



# 2015 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:  
Grant #: 20150529

\$25,000

## Organization / Agency Information

<b>Organization/Agency Name:</b> The Arc of Riverside County 241		
<b>Physical Address:</b> 8188 Lincoln Ave		<b>City/State/Zip:</b> Riverside, CA 92504
<b>Mailing Address:</b> 8188 Lincoln Ave		<b>City/State/Zip:</b> Riverside, CA 92504
<b>CEO or Director:</b> Jim Stream ✓		<b>Title:</b> Executive Director
<b>Phone:</b> (951) 688-5141 x227	<b>Fax:</b> (951) 688-5111	<b>Email:</b> Jstream287@aol.com
<b>Contact Person:</b> Samantha Calderon		<b>Title:</b> Director of Communications
<b>Phone:</b> (951) 688-5141 x225	<b>Fax:</b> (951) 688-5111	<b>Email:</b> scalderon@arc-riverside.org
<b>Web Site Address:</b> ArcRiverside.org		<b>Tax ID:</b> 95-1907771

## Program / Grant Information

**Interest Area:**  Animal Protection  Education  Environment  Health  Human Dignity

<b>Program/Project Name:</b> Brockton Resource Center Adaptive Equipment			<b>Amount of Grant Requested:</b> \$ 25,000
<b>Total Organization Budget:</b> \$4,861,080	<b>Per 990, Percentage of Program Service Expenses (Column B / Column A x 100):</b> 82.67%	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C / Column A x 100):</b> 16.18%	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b> 17.33%
<b>Purpose of Grant Request (one sentence):</b>  To provide a way to increase mobility options through the use of adaptive equipment and increase independence and dignity for individuals with cognitive and physical limitations who use wheelchairs for mobility.			
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> 2011- \$20,000			

## Signatures

<b>Board President / Chair: (Print name and Title)</b> Ron Domme, President	<b>Signature:</b> 	<b>Date:</b> 3-22-15
<b>Executive Director/President: (Print name and Title)</b> Jim Stream, Executive Director	<b>Signature:</b> 	<b>Date:</b> 3/23/15

## 2015 S.L. Gimbel Foundation Fund APPLICATION Narrative

### **I. Organization Background; Target Population**

A) The Arc of Riverside County is a private, non-profit corporation serving individuals with developmental disabilities. We take pride in providing much-needed services for these individuals; services including day services, vocational and job training, life skills training, job placement, advocacy and more. The Arc operates six (6) facilities in Western Riverside County providing services for those in need of full-time programming to ensure the development and maintenance of functional skills required for self-advocacy, community integration and self-care. Over the years The Arc has significantly increased the quality of life for the individuals we serve. Since 1953, The Arc has been and continues to be committed to securing for all individuals with developmental disabilities, in partnership with their families, legal guardians or conservators the opportunity to choose and realize their goals of where and how they learn, live, work and play.

B) Some of the special projects that go beyond the usual services we provide to 400 individuals with developmental disabilities on a daily basis are the following:

We have made a concerted effort to fill the gap for support, information and advocacy for younger families with children with special needs. In partnership with Riverside Park's Department we began My Play Club in Fairmount Park at the Universally Accessible Playground. Its purpose is to provide a structured time for children with and without disabilities to play together that will help begin to break down barriers between these two groups at a young age. This activity is now in its third year, the number of participants is growing and it is a huge success. In addition, we will be implementing our 3<sup>rd</sup> annual My Play Club Summer Day Camp for kids with special needs and their siblings in Riverside's Reid Park.

We began a closed Facebook page titled "Special Needs Community" that now has over 3,100 members. Through this page, family members of people with special needs can communicate with each other, find resources, help in accessing the system and use the forum to discuss and express opinions about Special Education and the Developmental Disabilities Service System.

We commissioned and helped create the National Wall of Respect in the parking lot of our main facility in Riverside. It is a mosaic mural that includes images of people with disabilities engaged in various activities with a backdrop of famous, local landmarks and icons. Its purpose is to promote the values of dignity, respect, inclusion and justice.

We created and helped launch an online survey on abuse of individuals with disabilities. Over 7,200 individuals responded. They included family members, individuals with disabilities, professionals in the field and those who respond to abuse as part of their job. The results are startling. The results indicate that over 65% of respondents have experienced abuse in one form or another.

We established the Aktion Club of Riverside. It is part of the family of Kiwanis Clubs and it is a way for people with intellectual disabilities to give back to their community. It has grown significantly over the last two years and is now the largest Aktion Club in the state.

Now we have begun the first program in the Inland Empire to increase the mobility of people that are confined to a wheelchair for most of their waking hours, as it is their only means for mobility. We are searching for funds to purchase the equipment that will fit their needs.

C) Currently we provide day services to about 400 adults each weekday that have an intellectual or developmental disability. Ages range from 18-80. These activities include development and maintenance of functional skills, self-advocacy, community integration, self-care, vocational skills, community awareness and social interaction skills. All individuals in our programs reside within Riverside County.

## **II. Project Information:**

**A)** To provide a way to increase mobility options through the use of adaptive equipment and increase independence and dignity for individuals with cognitive and physical limitations who use wheelchairs for mobility.

**B1)** Our project goal is to match individuals confined to wheelchairs and wish to become mobile with specific adaptive equipment that can be used during the day program to achieve their desired mobility. Dr. Scott Allen and Physical Therapist Rei Spickelmier have been retained to evaluate program participants and match them to the proper equipment. When an agreement has been met between the program participant, his/her parent/guardian/conservator and our consultants, we will provide the participant the equipment to begin a daily routine that will lead to greater mobility. No service in the Inland Empire is utilizing adaptive technology equipment in their programs; we are the first. As such, with our partnership with our experts we have been able to identify the benefits of using adaptive equipment that are so often neglected and lead to worsened health as individuals in programs like ours age. Overall, a dignified quality of life and a more accessible transition through increased mobility using the adaptive equipment is what we hope to obtain for each of these individuals.

**B2)**

**Objective I:** Move our entire facility to a location that is more accessible and suitable for this project.

**Activities: Phase 1:** Find location – Done

**Phase 2:** License and prepare location (tenant improvement) – in progress

**Phase 3:** Physically move the facility – By June 1, 2015

**Objective II:** Project enrollment medical evaluation and screening for each individual currently in the day program to find candidates.

**Activities: Phase 1:** Conduct medical evaluation by Dr. Scott Allen and on-staff nurse – Began in October 2014 and still in progress.

**Phase 2:** Physical Therapy evaluation by Rei Spickelmier to determine proper equipment and fitting – Began in October 2014 and still in progress.

**Phase 3:** Document evaluations and equipment into individuals Program Plans -ongoing

**Phase 4:** Obtain appropriate releases - ongoing

**Objective III:** Implement program plans into the individuals daily routine.

**Activities: Phase 1:** Train Direct Support Professionals by staff nurse and physical therapist Rei Spickelmier on proper and dignified use of all toileting equipment to be used by specific individuals.

**Phase 2:** Train Direct Support Professionals by staff nurse and physical therapist on the proper use of adaptive equipment that increases mobility.

**Phase 3:** Establish baseline mobility measurements to be evaluated in 3-month intervals for each participant in order to measure physical progress and communicate results to all parties.

**Phase 4:** Write specific rules and protocols for each individual participant.

### **TIMELINE:**

**June 1, 2015** – Move locations

**June 31, 2015** – Complete participant screenings

**August 15 – Ongoing** – Final acquisition of equipment & establish baseline mobility measurements

**July 16 – August 16, 2015**– Direct Support Professional training & Case managers to document evaluations into individuals program plans

**September 1, 2015** – Begin using adaptive equipment in daily routine.

**B3)** This grant will serve between 50-60 adults from the ages of 18-80 with an intellectual or developmental disability. Approximately 50% will be adults and 50% will be seniors that are in wheelchairs.

**B4)** Unfortunately for this underserved and underfunded population of individuals with intellectual and developmental disabilities, there are no service providers currently utilizing adaptive equipment in their programs. With in-depth consulting our experts have found that a project of this capacity should be a requirement for all service providers because of the increase in quality of life for these individuals. Not only does adaptive equipment increase accessibility and mobility, but also it gives the individuals a more dignified daily routine during tasks such as eating or toileting. Because of the medical care these individuals require, we feel that it is their right to be cared for by on-staff nurses, direct staff professionals and our volunteer medical doctor.

**C1)** With guidance from Dr. Allen and Rei Spickelmier, our key anticipated outcomes for our adaptive equipment project are increased dignity, mobility, preventative health, accessibility and a smoother transition as individuals age. Because of this explicit need in the community, we feel it is important to practice preventative health because medical reports state that getting up and moving provides much less stress on internal organs and results in fewer medical difficulties as individuals age. There is even evidence of longer life expectancy.

**C2)** We will know we have achieved the expected outcomes by:

- i. Number of participants using the equipment
- ii. Length of time of use for piece of equipment for each individual.
- iii. Survey of client and family members
- iv. When a client and family member want to use the equipment outside of our facility hours.

**C3)** Progress will be tracked and outcomes will be measured by:

- i. Satisfaction surveys
- ii. Monthly meetings between direct staff professionals and our experts
- iii. Monthly, 6-month and annual reports
- iv. Personal testimonies & anecdotes

**D)** Grant funds will be used to obtain the necessary adaptive equipment needed for these individuals to increase their quality of life during their daily routine in our day program.

### **III. Project Future**

**A)** Once the adaptive equipment is purchased, the primary expense will be met. We will assign 25% (\$30,000) of our annual fundraising to maintain this project.

### **IV. Governance, Executive Leadership and Key Personnel/Staff Qualifications**

**A)** The Board of Directors is composed of 50% family members of individuals with disabilities (By-Laws Requirement); Many active in the community and are leaders in their fields. The remaining members are community and business leaders that bring a range of experience and valuable skills to our agency. The Board is a policy-setting board that also actively participates in fundraising activities and is available to provide specific advice to the Executive Director when asked. The Board as a whole makes most major decisions. Committees of the board are as follows: Executive, Finance, and Ways & Means; Ad Hoc committees are convened for specific projects.

**B)** Describe the qualifications of key personnel/staff responsible for the project.

- i. Licensed Vocational Nurses
- ii. Certified Physical Therapist
- iii. Medical Doctor

## V. Project Budget

Provide a detailed line-item budget for your project by completing the table below.

**A breakdown of specific line item requests and attendant costs should include:**

- 1) Line item requests for materials, supplies, equipment and others:
  - a. Identify and list the type of materials, supplies, equipment, etc.
  - b. Specify the unit cost, number of units, and total cost
  - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff, compensation, benefits:
  - a. Identify the position; for each position request, specify the hourly rate and the number of hours (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
  - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)

Line Item Description	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Medium Gait Trainer	1 unit	\$0	\$0	\$4,200	\$4,200
Large Gait Trainer	1 unit	\$0	\$0	\$4,600	\$4,600
Changing Support Station	1 unit	\$0	\$0	\$3,200	\$3,200
Rifton Tram	1 unit	\$0	\$0	\$4,400	\$4,400
Easy Stand Stander	1 unit	\$0	\$0	\$5,000	\$5,000
Physical Therapist Consulting	\$25/hr x 6hrs/wk x 24 wks	\$0	0	\$3,600	\$3,600
Donated equipment from school district	2 units	\$0	\$10,000	\$0	\$10,000
Additional Equipment	5 units	\$10,000	\$15,000	\$0	\$25,000
Volunteer Medical Doctor from Board of Directors	Various hours per week	\$0	\$0	\$0	\$0
Physical Therapist	\$25/hr x 5hrs/wk x 24 wks	\$3,000	\$0	\$0	\$3,000
<b>TOTALS:</b>				25,000	\$63,000

## 2015 S.L. Gimbel Foundation APPLICATION

**VI. Sources of Funding:** Please list your current sources of funding and amounts.

### *Secured/Awarded*

Name of Funder: Foundation, Corporation, Government	Amount
Laura May Stewart Testamentary Trust Grant	\$2,400.00

### *Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Community Development Block Grant, City of Riverside	\$20,000	May
Community Development Block Grant, City of Moreno Valley	\$20,000	April
Kaiser Permanente Regional Grant	\$80,000	June

**Diversity of Funding Sources:** A financially healthy organization should have a diverse mix of funding sources. Complete those categories that apply to your organization using figures from your most recent fiscal year.

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$43,645	1.00%	Program Fees	\$3,830,195	89.51%
Fundraising/Special Events	\$16,858	.40%	Interest Income	\$7,100	0.17%
Corp/Foundation Grants	\$9,000	.21%	Other:	\$372,368	8.71%
Government Grants	\$0	0	Other:	\$0	0

**Notes:** N/A

## 2015 S.L. Gimbel Foundation APPLICATION

### VII. Financial Analysis

**Agency Name:** The Arc of Riverside County

**Most Current Fiscal Year (Dates):** From July 2013 To: June 2014

This section presents an overview of an applicant organization's financial health and will be reviewed along with the grant proposal. Provide all the information requested on your **entire organization**. Include any notes that may explain any extraordinary circumstances. Information should be taken from your most recent 990 and audit. **Double check your figures!**

#### Form 990, Part IX: Statement of Functional Expenses

**1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)**

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$ 4,242,282	\$ 3,507,078	\$ 686,698	\$ 48,506

**2) Calculate the percentages of Columns B, C, and D, over A (per totals above)**

- Program services (B) – A general rule is that at least 75% of total expenses should be used to support programs
- Management & general administration (C) – A general rule is that no more than 15% of total expenses should be used for management & general expenses
- Fundraising (D) – A general rule is that no more than 10% of total expenses should be used for fundraising

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	82.67 %	16.18 %	1.15 %

**3) Calculate the difference between your CURRENT year budget for management & general expenses and your previous management & general expenses per your 990 (Column C)**

Percentage of Organization's Current Total Budget used for Administration (from cover page)	Column C, Management & general expenses per 990 above	Differential
11.70 %	16.18 %	10.09 %

If the differential is above (+) or below (-) **10%**, provide an explanation:

We are above 10% by .09% because of the internal transitions of staff from indirect to direct.

## 2015 S.L. Gimbel Foundation APPLICATION

**Quick Ratio:** Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$ 115,070	\$ 399,623	\$338,441	1.52

### Excess or Deficit for the Year:

<b>Excess or (Deficit) Most recent fiscal year end</b>	<b>Excess or (Deficit) Prior fiscal year end</b>
\$ 36,885	\$ 32,308

Notes: N/A

### VIII. Application submission check list:

	<b><u>Submit FOUR (4) Copies: 1 ORIGINAL (WITH ORIGINAL SIGNATURES) and 3 copies, collated and stapled together of the following:</u></b>		<b><u>Submit ONE (1) Copy:</u></b>
✓	Completed Grant Application Form (cover sheet, narrative (3 pages maximum), budget and sources of funding, financial analysis page	✓	A copy of your current 501(c)(3) letter from the IRS
✓	A list of your Board members and their affiliations	✓	A copy of your most recent year-end financial statements (audited if available; double-sided)
✓	Your current operating budget and the previous year's actual expenses	✓	A copy of your most recent 990 ( double-sided)
✓	Part IX only of the 990 form, Statement of Functional Expenses (one page). If you completed a 990-EZ, fill out the attached Part IX, Functional Expenses of the 990 form using figures from your 990-EZ		
N/A	For past grantees, a copy of your most recent final report.		



# The Arc of Riverside County -- OPERATING BUDGET 2014-2015

PROGRAM: Consolidated

MANAGER: Martha Owsian

REVENUE: (01-19)	MONTHLY	ANNUAL
01 - Contribution	<u>3,200</u>	<u>38,400</u>
02- Summer Camp	<u>510</u>	<u>6,120</u>
03 - Special Events	<u>1,200</u>	<u>14,400</u>
04 - Contract Income	<u>30,000</u>	<u>360,000</u>
05 - Shipping	<u>420</u>	<u>5,040</u>
06 - Business Enterprise (Other)	<u>1,465</u>	<u>17,580</u>
07 - Fees	<u>368,205</u>	<u>4,418,460</u>
08 - Interest Income	<u>10</u>	<u>120</u>
09 - Miscellaneous Income	<u>170</u>	<u>2,040</u>
10 - Grants	<u>2,000</u>	<u>24,000</u>
11 - Golf Event	<u>2,800</u>	<u>33,600</u>
<b>TOTAL REVENUE:</b>	<b><u>409,980</u></b>	<b><u>4,919,760</u></b>
EXPENSES: (20-39)	MONTHLY	ANNUAL
20 - Client Production Wages	<u>9,700</u>	<u>116,400</u>
21 - Client Hourly Wages	<u>13,635</u>	<u>163,620</u>
22 - Salaries - Management	<u>42,250</u>	<u>507,000</u>
23 - Wages - Clerical	<u>5,075</u>	<u>60,900</u>
24 - Wages -- Staff	<u>114,600</u>	<u>1,375,200</u>
25 - Payroll Tax Expense	<u>13,000</u>	<u>156,000</u>
26 - Worker's Comp.	<u>20,000</u>	<u>240,000</u>
27 - Medical Insurance	<u>32,000</u>	<u>384,000</u>
28 - Client Benefit Pay	<u>1,300</u>	<u>15,600</u>
29 - Unemployment Claims	<u>635</u>	<u>7,620</u>
30 - Other Staff Benefits (Vacation / Sick)	V <u>6,675</u>	<u>80,100</u>
	S <u>1,950</u>	<u>23,400</u>
31-Life Insurance	<u>100</u>	<u>1,200</u>
<b>TOTAL WAGES &amp; BENEFITS:</b>	<b><u>260,920</u></b>	<b><u>3,131,040</u></b>

The Arc of Riverside County -- OPERATING BUDGET 2014-2015

	MONTHLY	ANNUAL
OTHER EXPENSES: (40-90)		
40 - Audit / Accounting	<u>1,000</u>	<u>12,000</u>
41 - Advertising	<u>500</u>	<u>6,000</u>
42 - Attorney	<u>-</u>	<u>-</u>
43 - Golf Tournament	<u>985</u>	<u>11,820</u>
44 - Bank Charges	<u>230</u>	<u>2,760</u>
45 - Consulting Services	<u>300</u>	<u>3,600</u>
46- Play Club	<u>600</u>	<u>7,200</u>
47 - Depreciation & Amortization	<u>4,000</u>	<u>48,000</u>
48 - Dues: CARF & Arc & CRA	<u>1,000</u>	<u>12,000</u>
49 - Dues & Publications	<u>1,300</u>	<u>15,600</u>
50 - Business Insurance / Auto	<u>3,300</u>	<u>39,600</u>
51 - Interest	<u>2,700</u>	<u>32,400</u>
52 - Meetings / Conferences / Special Events	<u>800</u>	<u>9,600</u>
53 - Travel / Conventions	<u>800</u>	<u>9,600</u>
54 - Miscellaneous Supplies	<u>200</u>	<u>2,400</u>
55 - Postage & Shipping	<u>400</u>	<u>4,800</u>
56 - Printing	<u>200</u>	<u>2,400</u>
57 - Rent	<u>28,200</u>	<u>338,400</u>
58 - Repair & Maintenance - Building	<u>900</u>	<u>10,800</u>
59 - Repair & Maintenance - Equipment	<u>140</u>	<u>1,680</u>
60 - Repair & Maintenance - Vehicles	<u>400</u>	<u>4,800</u>
61 - Contract Supplies	<u>500</u>	<u>6,000</u>
62 - Janitorial Supplies	<u>5,000</u>	<u>60,000</u>
63 - Office Supplies	<u>2,000</u>	<u>24,000</u>
64 - Safety Supplies	<u>900</u>	<u>10,800</u>
65 - Media Website	<u>440</u>	<u>5,280</u>
66 - Program Supplies	<u>4,800</u>	<u>57,600</u>
67 - Purchase Equipment	<u>300</u>	<u>3,600</u>

The Arc of Riverside County -- OPERATING BUDGET 2014-2015

OTHER EXPENSES:		
68 - Licenses & Permits	<u>300</u>	<u>3,600</u>
69 - Telephone & Telegram	<u>2,000</u>	<u>24,000</u>
70 - Training & Education	<u>125</u>	<u>1,500</u>
71 - Vehicle Mileage & Gas	<u>3,800</u>	<u>45,600</u>
72 - Utilities	<u>7,200</u>	<u>86,400</u>
73 - Vehicle Lease	<u>-</u>	<u>-</u>
74 - Equipment Rental	<u>1,100</u>	<u>13,200</u>
75 - Administration	<u>67,750</u>	<u>813,000</u>
TOTAL "OTHER" EXPENSES    \$	<u>144,170</u>	<u>1,730,040</u>
TOTAL EXPENSES	<u>405,090</u>	<u>4,861,080</u>
NET PROFIT (LOSS)	4,890	58,680

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	84,000.	8,400.	67,200.	8,400.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	2,374,075.	2,017,262.	322,337.	34,476.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	592,298.	503,714.	88,584.	
10 Payroll taxes	173,241.	142,057.	27,719.	3,465.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	13,650.		13,650.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	20,947.	12,792.	8,155.	
12 Advertising and promotion	22,892.		22,362.	530.
13 Office expenses				
14 Information technology				
15 Royalties				
16 Occupancy	508,269.	465,784.	40,918.	1,567.
17 Travel	49,210.	37,501.	11,709.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	11,781.	10,323.	1,458.	
20 Interest	28,351.	20,563.	7,788.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	52,564.	32,777.	19,787.	
23 Insurance	39,155.	21,694.	17,461.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a PROGRAM SUPPLIES	169,918.	169,918.		
b ADVERTISING/MISC.	62,098.	47,781.	14,317.	
c DUES/LICENSES/PERMITS	36,441.	14,844.	21,597.	
d PRINTING AND POSTAGE	3,392.	1,668.	1,656.	68.
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	4,242,282.	3,507,078.	686,698.	48,506.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here  if following SOP 98-2 (ASC 958-720)

## **The Arc of Riverside County 2013 – 2014 Board of Directors**

Ron Domme, **President**, Retired, 10 years

Dan Baldwin, **Vice President**, Owner of Baldwin A/C, 12 years

Sharon Nakama, **Secretary**, Principle in Los Angeles School District, 5 years

Bud Luppino, **Treasurer**, Owner of Bud's Tire Pro, 14 years

Bianca Blua, **Director**, School Teacher, 5 years

Mark Cloud, **Director**, PR Riverside Utilities, 1 year

Richard Lemire, **Director**, Sr. Public Info Specialist, Community Action, 10 years

Margie Lumbley, **Director**, Retired, 16 years

Stan Morrison, **Director**, PR for Security Bank, 5 years

Mike Warren, **Director**, Retired, 22 years

Richard Williams, **Director**, Retired, 6 years

Scott. A. Allen, MD, **Director**, Clinical Associate Professor UCR, 2 years

RECEIVED MAY 26 2004

**Internal Revenue Service**

**Date:** May 21, 2004

Arc Riverside  
8138 Mar Vista Court  
Riverside, CA 92504-4324

**Department of the Treasury**  
**P. O. Box 2508**  
**Cincinnati, OH 45201**

**Person to Contact:**  
Ronnie Clemons 31-04020  
Customer Service Representative  
**Toll Free Telephone Number:**  
8:00 a.m. to 6:30 p.m. EST  
877-829-5500  
**Fax Number:**  
513-263-3756  
**Federal Identification Number:**  
95-1907771

Dear Sir or Madam:

This is in response to your request of April 5, 2004, regarding your organization's tax-exempt status.

In March 1958, we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Based on information subsequently submitted, we classified your organization as one that is not a private foundation within the meaning of section 509(a) of the Code because it is an organization described in Section 509(a)(2).

This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's sources of support, or its character, method of operations, or purposes have changed, please let us know so we can consider the effect of the change on the exempt status and foundation status of your organization.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of \$20 a day, up to a maximum of \$10,000, when a return is filed late, unless there is reasonable cause for the delay.

All exempt organizations (unless specifically excluded) are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more paid to each employee during a calendar year. Your organization is not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes.

Donors may deduct contributions to your organization as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to your organization or for its use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.



The  
Community  
Foundation

Strengthening Inland Southern California through Philanthropy

*S. L. Gimbel Foundation Fund*

**BOARD OF DIRECTORS**

Philip Savage IV  
Chair of the Board

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Diane Valenzuela

Dr. Jonathan Lorenzo Yorba  
President and CEO

July 21, 2015

Mr. Jim Stream  
Executive Director  
The Arc of Riverside County  
8188 Lincoln Ave.  
Riverside, CA 92504

Dear Mr. Stream:

Congratulations! A grant has been approved for **The Arc of Riverside County** in the amount of **\$25,000** from the S.L. Gimbel Foundation. The **performance period for this grant is August 1, 2015 to July 31, 2016**. Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

***Brockton Resource Center Adaptive Equipment: To increase mobility options through the use of adaptive equipment and increase independence and dignity for individuals with cognitive and physical limitations who use wheelchairs for mobility.***

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, please sign and date the enclosed copy and return the original copy to The Community Foundation within the next two weeks. Please retain a copy of the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

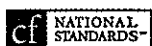
A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. The **Grant Evaluation is due by August 15, 2016** and a copy will be available online.

We wish you great success and look forward to working with you during the grant performance period.

If you have any questions, please call me at 951-684-4192 ext. 114 or email me at [ccudiamat@thecommunityfoundation.net](mailto:ccudiamat@thecommunityfoundation.net).

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs



Confirmed in Compliance  
with National Standards for  
U.S. Community Foundations

241 The Arc of Riverside County 20150529

GIMBEL

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**2015 S.L. Gimbel Foundation Fund**

**Grant Agreement**

**Organization:** The Arc of Riverside County

**Grant Amount:** \$ 25,000 **Grant Number:** 20150529

**Grant Period:** August 1, 2015 to July 31, 2016 (Evaluations due by August 15, 2016)

**Purpose:** **Brockton Resource Center Adaptive Equipment: To increase mobility options through the use of adaptive equipment and increase independence and dignity for individuals with cognitive and physical limitations who use wheelchairs for mobility.**

**1. Use of Grant Funds**

Grant funds must be expended within the grant period, for the purpose and objectives described in your grant proposal. Grant funds may not be expended for any other purpose without prior written approval by The Community Foundation. If there are significant difficulties in making use of the funds as specified in your proposal, or if the grant funds cannot be spent within the grant period, notify us in writing promptly.

Formal requests for extensions or variances must be submitted to the Foundation's Board of Directors for approval a minimum of 60 days before the end of the grant period.

Requests for variances or extensions are reviewed on a case-by-case basis and approved by the Board of Directors. If a request is denied, unused funds must be immediately refunded to the Foundation.

**2. Payment of Grant Funds**

The grant funds will be paid in full by the Foundation upon receipt of the signed Grant Agreement. Challenge grant funds will be paid in full upon receipt of the signed Grant Agreement and upon receipt of documentation providing evidence that condition(s) of the challenge grant has/have been met.

**3. Certification and Maintenance of Exempt Organization Status**

This grant is specifically conditioned upon Grantee's status as an eligible grantee of The Community Foundation. The Foundation has obtained a copy of the Grantee's IRS determination letter. Grantee confirms that it has not had any change in its tax-exempt status, and shall notify the Foundation immediately of any such change.

**4. Final Report and Records**

The Grantee will submit the Grant Evaluation report per the deadline set forth in the award letter. This report includes a narrative on outcomes based on goals and objectives set forth in the grant proposal and an expenditure report documenting use of grant funds. If equipment was purchased, copies of receipts need to be included.

**5. Grantee's Financial Responsibilities**

Grantee will keep records of receipts and expenditures of grant funds and other supporting documentation related to the grant at least four (4) years after completion of the grant and will make such records of receipts, expenditures and supporting documentation available to the Foundation upon request.

**6. Publicity**

The Community Foundation recommends publicity for the grant and acknowledging The Community Foundation in internal correspondence, brochures as appropriate; newsletters, annual reports and email blasts or e-newsletters.



The credit line of "Made possible in part by a grant from the "S.L. Gimbel Foundation Advised Fund at The Community Foundation – Inland Southern California" is suggested. When your donors are listed in printed materials, include the S.L. Gimbel Foundation Advised Fund at The Community Foundation in the appropriate contribution size category. When publishing our name, please note the "The" at the beginning of our name is a legal part of our name. It should always be used and capitalized. Attaching our logo is also appreciated. Our logo can be downloaded from our website at [www.thecommunityfoundation.net](http://www.thecommunityfoundation.net).

**7. Indemnification**

In the event that a claim of any kind is asserted against the Grantee or the Foundation related to or arising from the project funded by the Grant and a proceeding is brought against the Foundation by reason of such claim, the Grantee, upon written notice from the Foundation, shall, at the Grantee's expense, resist or defend such action or proceeding, at no cost to the Foundation, by counsel approved by the Foundation in writing.

Grantee hereby agrees, to the fullest extent permitted by law, to defend, indemnify, and hold harmless the Foundation, its offices, directors, employees, and agents, from and against any and all claims, liabilities, losses, and expenses (including reasonable attorneys' fees) directly, indirectly, wholly, or partially arising from or in connection with any act or omission by Grantee, its employees, or agents in applying for or accepting the Grant, in expending or applying the Grant funds or in carrying out any project or program supported by the Grant, except to the extent that such claims, liabilities, losses, and expenses arise from or in connection with any bad faith act or omission by the Foundation, its officers, directors, employees, or agent.

**8. Termination**

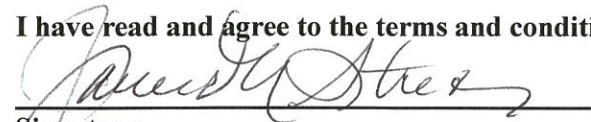
The Community Foundation may terminate this agreement, withhold payments, or both at any time, if, in the Community Foundation's judgment: a) The Community Foundation is not satisfied with the quality of the Grantee's progress toward achieving the project goals and objectives; b) the Grantee dissolves or fails to operate; c) the Grantee fails to comply with the terms and conditions of this agreement.

**9. Limitation of Support**

This Agreement contains the entire agreement between the parties with respect to the Grant and supersedes any previous oral or written understandings or agreements.

\*\*\*\*\*

I have read and agree to the terms and conditions of the Grant Agreement.



Signature

James N. Stream

Printed Name

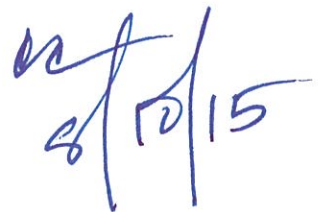
8/3/15

Date

Executive Director

Title

Organization: 241 The Arc of Riverside County  
Grant Number: 20150529





The  
Community  
Foundation

Strengthening Inland Southern California through Philanthropy

*S. L. Gimbel Foundation Fund*

BOARD OF DIRECTORS

August 10, 2015

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D. Matthew Pim

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Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Mr. Jim Stream  
Executive Director  
The Arc of Riverside County  
8188 Lincoln Ave.  
Riverside, CA 92504

Dear Mr. Stream:

The Community Foundation is pleased to enclose a grant check for **\$25,000** from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned. The completed Grant Evaluation form is due by August 15, 2016 and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

We greatly appreciate any help you can give us in publicizing the grant. **Please use the following credit in any grant announcements or materials funded by the grant: "The (name of project/program) is supported by a grant from The S. L. Gimbel Foundation."** You may send copies of articles printed in local papers, stories in your agency newsletter, annual report, press releases, and other publications for our files.

If you have any questions, please contact me at 951-684-4194.

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

20150529

39527

GIMB3

Dr. Jonathan Lorenzo Yorba  
President and CEO



Confirmed in Compliance  
with National Standards for  
U.S. Community Foundations

HOLD TO LIGHT TO VIEW WATERMARK IN PAPER. HEAT SENSITIVE RED IMAGE DISAPPEARS WITH HEAT. DETECTION CIRCLE REVEALS A LOCK WHEN TESTED.

39527



Strengthening Inland Southern California through Philanthropy  
3700 SIXTH STREET, SUITE 200  
RIVERSIDE, CA 92501  
951-241-7777 / FAX 951-684-1911



A Financial Services Company  
3695 Main Street, Riverside, CA 92501  
90-3414-1222

Check Fraud  
Protection for Business

PAY \* Twenty-Five Thousand and no/100 \*

TO THE ORDER OF

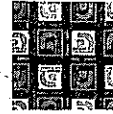
DATE

07/23/2015

AMOUNT

\$\*\*\*\*25,000.00

The Arc of Riverside County  
8188 Lincoln Ave.  
Riverside, CA 92504



*Jonathan Lorenzo York*  
*Celia Andriamat*  
AUTHORIZED SIGNATURE

Security features. Details on back.

⑈039527⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

39527

241 The Arc of Riverside County

07/23/2015 039527

20150529	07/21/2015	Brockton Resource Center Adaptive Equipment	25,000.00	25,000.00
GIMB		S.L. Gimbel Foundation Advised Fund	25,000.00	

CHECK TOTAL: \$\*\*\*\*25,000.00

The Community Foundation

39527

241 The Arc of Riverside County

07/23/2015 039527

20150529	07/21/2015	Brockton Resource Center Adaptive Equipment	25,000.00	25,000.00
GIMB		S.L. Gimbel Foundation Advised Fund	25,000.00	

CHECK TOTAL: \$\*\*\*\*25,000.00