



**Beverly Hills City Council Liaison/ Human Relations Commission  
Committee will conduct a Special Meeting, at the following time and place,  
and will address the agenda listed below:**

**CITY HALL  
455 North Rexford Drive  
4th Floor Conference Room A  
Beverly Hills, CA 90210**

**Wednesday, May 2, 2018  
4:30 PM**

**AGENDA**

**1) Public Comment**

Members of the public will be given the opportunity to directly address the Committee on any item listed on the agenda.

**2) Recommendations of the Human Relations and Charitable  
Solicitation Commissions for Allocation of Community Assistance  
Grant Fund Recommendations for Fiscal Year 2018/19**

**3) Tenant/Landlord Forum**

**4) Adjournment**

A handwritten signature in black ink, appearing to read "Byron Pope", written over a horizontal line.  
**Byron Pope, City Clerk**

**Posted: April 27, 2018**

***A DETAILED LIAISON AGENDA PACKET IS AVAILABLE FOR REVIEW IN THE LIBRARY  
AND CITY CLERK'S OFFICE.***

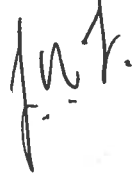


In accordance with the Americans with Disabilities Act, Conference Room A is wheelchair accessible. If you need special assistance to attend this meeting, please call the City Manager's Office at (310) 285-1014 or TTY (310) 285-6881. Please notify the City Manager's Office at least twenty-four (24) hours prior to the meeting if you require captioning service so that reasonable arrangements can be made.



**CITY OF BEVERLY HILLS**  
**HUMAN SERVICES DIVISION**  
**MEMORANDUM**

**To:** Human Relations Council Liaisons

**From:** James R. Latta, LCSW, Human Services Administrator 

**Date:** May 2, 2018

**Subject:** Community Assistance Grant Funding: Applications for FY 2018/19

**Attachment:** 1. Social Service Goals and Populations Served  
2. CAGF FY 18/19 Requests and Recommendations  
3. CAGF FY 18/19 Application Summaries

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**INTRODUCTION**

Maintaining a social service safety net is a public service priority stated in the City's General Plan. The City's Community Assistance Grant Funding (CAGF) enables the City to secure partnerships with local social service agencies to support the quality of life of Beverly Hills' residents. The City's safety net creates a continuum of care for the most vulnerable members of the community including active and frail elderly, disabled and low-means residents, and homeless individuals (Attachment 1). The Community Services Department's Human Services Division administers the CAGF program.

- Proposals for fiscal year (FY) 2018/2019 total \$1,262,500 plus in-kind funding.
- An allocation of \$969,500 will maintain services at FY 2017/18 levels (\$837,000 budgeted plus an allocation of \$132,500 for the increase in 2017-18 services)
- The Human Relations Commission recommends the budget be augmented by an additional \$248,500 to expand services from last year for a total budget of \$1,085,500.

To prepare for the FY 18/19 funding cycle, the Charitable Solicitations (CSC) and Human Relations (HRC) Commissions worked together with Human Services and Police Department staff to evaluate proposals and recommend programs for funding by City Council. The CSC evaluated the fiscal health of each organization using its solicitations permit criteria. The HRC weighed community needs with the programs proposed using criteria set by the City. The commissions also attempted to avoid duplication of services.

**DISCUSSION**

The City prioritizes funding for services to benefit the most vulnerable members of the community. Active and frail elderly, disabled and low-means residents, and homeless individuals continue to be the primary populations in need of assistance. The City targets services through CAGF that address these populations' special needs.

A total of 21 organizations submitted proposals for funding for the FY 2018/19 cycle. Of the 21 proposals, 16 are from organizations currently funded in FY17/18, one of is an organization that applied in FY 16/17 and FY 17/18 and was declined, and four are from new organizations. All five of these applications are for additional social services. See Attachment 2 for a list of applicant organizations (column [col.] 1), funding history (col. 2) and current requests (col. 8). See Attachment 3 for a summary of each application received including details about the program proposed, agency description and funding history.

FY 18/19 CAGF proposals respond to City priorities and community concerns and can be organized under the following themes:

- **Homeless Services** – All Saints' Episcopal Church (meal program/support services), People Assisting the Homeless (shelter beds), Step Up On Second (mental health and housing), Westside Food Bank (nutrition).
- **Senior Services** – Affordable Living for the Aging (aging-in-place), Bet Tzedek (legal services for seniors), Beverly Hills Active Adult Club (socialization), Covia/Senior Episcopal Communities (senior companion program and telephonic socialization program for seniors), Jewish Family Service of Los Angeles (case management, emergency services), The Maple Counseling Center (mental health).
- **Health & Wellbeing** – America Lung Association (smoking cessation), Beverly Hills CPR, Cedars-Sinai Medical Care Foundation (smoking cessation), Chiron Center, Inc. (crisis response), Loving Home Hospice (palliative care for children), The Maple Counseling Center (mental health), Saban Community Clinic (medical, dental), Step Up On Second (case management, mental health), ETTA (advocacy for young adults who are developmentally disabled).
- **Education** –Beverly Hills Education Foundation (community events), Covia/Episcopal Senior Communities (telephonic and online educational programming for seniors)
- **Legal Services** – Bet Tzedek (pro bono legal services for seniors and for housing rights); Housing Rights Center (housing discrimination legal advocacy)
- **Cultural Enhancement** –Theatre 40 and Wallis Annenberg Center for the Performing Arts.

The proposed social service programs were evaluated based on the criteria listed below. Additionally the CSC utilized their standard Solicitations Permit assessment process to evaluate the fiscal health of each applicant organization.

#### *CAGF Proposal Evaluation Criteria*

1. Organization provides services that support the City's commitment to the provision of a social service safety net for the most vulnerable members of the community.
2. Organization provides a unique service that addresses an unmet need of the community and does not duplicate other providers or programs.
3. Organization does not rely solely on community assistance funding to remain viable and the services would cost more to the City if the City provided them directly.
4. Organization provides regional services that enable the City to meet its regional obligation to help ameliorate social issues.
5. Organization is a 501c.3 or in partnership with a 501c.3.

#### *Cultural CAGF Proposal Evaluation Criteria*

1. Organization provides a unique service that addresses an unmet need of the community and does not duplicate other providers or programs.

2. Organization does not rely solely on community assistance funding to remain viable and the services would cost more to the City if the City provided them directly.
3. Must be an existing Beverly Hills organization that has demonstrated a history of exemplary cultural opportunities which respond to community needs.

### **Commission Recommendations**

The Charitable Solicitations and Human Relations Commissions appointed ad-hoc committees to review the program proposals (evaluated by the HRC) and each organization's fiscal status (evaluated by the CSC). The ad hocs then met jointly in April 2, 2018 to synthesize their findings and combine recommendations into one report. The following applicant organizations were invited to this meeting to clarify questions about their proposed program or the financial status of their organization: American Lung Association, Bet Tzedek Legal Services, Cedars –Sinai Medical care Foundation, Covia / Episcopal Senior Communities, ETTA, Housing Rights Center, Loving Home Hospice and Theatre 40. The final joint ad-hoc report was then presented to the respective commissions at their April formal meetings – Charitable Solicitations on April 11, 2018, Human Relations on April 19, 2018.

At both April formal commission meetings, the CSC and HRC unanimously approved their ad hoc's recommendations to inform the Council Liaisons on which proposals to fund. The Commissions made the following observations for Council consideration:

**American Lung Association** –The two Commissions did not recommend funding as they were not local, administration of the program would be an additional cost and questioned the effectiveness of online treatment.

**Housing Rights Center** - The HRC and the CSC did not recommend funding. This organization specializes in reasonable accommodation and discrimination advocacy for tenants. Staffed by counselors and volunteers, aren't familiar with Beverly Hill's revised Rent Stabilization Ordinance and have limited means to litigate cases.

**Loving Home Hospice for Children**- The HRC and CSC did not make a recommendation to fund this organization as they were unable to demonstrate the service was unique to this community and was an unmet need. The organization's finances were in decline.

**Theatre 40**-The HRC and CSC recommended funding Theatre 40 with the same allocation as last year, noting they already receive approximately \$85,000 of in-kind funding for their annual production of *The Manor – Murder and Madness at Greystone*. It was also noted that the organization's finances are in decline.

### **FISCAL IMPACT**

Recognizing that \$837,000 is currently the formal base budget for CAGF, Council may add additional funding once Commission recommendations are presented to Council. Staff typically utilizes the prior year's allocation as a starting point to discuss current allocations. However, in order to incorporate new programs and expand existing ones to meet increasing demand, some existing organizations will experience a reduction in funding if the City wishes to maintain the same allocation as last year. Recommended allocations to maintain the 2017-18 CAGF funding levels of \$969,500 are in Attachment 2, column 9.

To account for the joint recommendations by the CSC and HRC, the organizations' prior performance, current community needs, and projected demand for services, the HRC in agreement with staff, recommends a CAGF budget of \$1,085,500. This will be allocated from the General Fund to enhance services and increase the size of several programs serving populations



with growing needs. This funding would be allocated as part of City Council's FY 18/19 budget process currently underway.

### **RECOMMENDATION**

The Liaison Committee is asked to review the applications and make recommendations on funding allocations to the City Council (Attachment 4).

The Charitable Solicitations and Human Relations Commissions recommend the following to City Council as it reaches consensus on the programs to fund through FY 18/19 Community Assistance Grant Funding:

1. *Prioritize Vulnerable Populations:* Continue funding for priority services for the most vulnerable (e.g., at-risk individuals, frail elderly, chronically homeless).
2. *Funding Allocations:* Fund cultural grant component while still enhancing grant funding for both priority services and qualified long term recipient organizations. Recommended distribution levels are listed in Attachment 2.

Representatives from the Human Relations Commission, the Charitable Solicitations Commissions, and staff liaisons from the Human Services Division and the Police Department will be in attendance to answer Council Liaison questions.



Nancy Hunt-Coffey Director Community Services

Approved By

## **Attachment 1**

## City of Beverly Hills Human Services Goals and Populations Served

### **Public Services Goals**

Source: City of Beverly Hills General Plan, Adopted June 2010

*The provision of human services that meet the needs of residents of the community.*

PS 4.1 Social Services Safety Net. Continue to prevent crises through benefits advocacy, legal assistance, and services that address food, shelter, health maintenance, and transportation.

PS 4.2 Diversity Awareness/Education. Maintain a sense of community and increase public awareness of, and respect for, the cultural diversity of the City. Promote a positive social environment between the members of individual neighborhoods and the community at large.

PS 4.3 Elderly Assistance/Education. Continue to provide educational and human services to the City's active and frail elderly residents, to maintain and improve their quality of life, personal growth, and enrichment.

PS 4.4 Regional Social Responsibility. Collaborate with other communities to develop programs, resources, and outreach for the prevention of and intervention for emerging local and regional issues such as homelessness.

### **Populations Served**

#### **Older Adults**

Beverly Hills residents qualify for older adult programs beginning at age 55. The core services support older adults' safety and independence as they age in place by addressing basic material needs, health, mental health, access to public/gov't benefits, home safety, and housing retention. With basic needs met, services also focus on maintaining and improving quality of life, personal growth, and enrichment.

- Adults age 65+ represent 19% of the City's population, significantly higher than the 11% County-wide average.
  - Of adults age 65+, over half are age 75+, 31 percent have a disability.
- The population age 60 and older represents 25.6% of the population or 8,757 people.
- The population age 50 and older represents 39.3% of the population or 13,706 people.
- Issues facing older adults include: health/mobility, nutrition, frailty, transportation, housing, isolation, mental health, cognitive functioning, elder abuse (financial).

#### **Homeless Individuals**

The Beverly Hills homeless population includes individuals who consistently stay in the Beverly Hills area as well as individuals who pass through from nearby cities or other states.

- The Changing Lives and Sharing Places (CLASP) homeless outreach team is dually focused on (1) connecting long-time Beverly Hills' homeless with supportive services to move from the streets into permanent housing and (2) quickly linking new arrivals to services throughout the region that will address their immediate needs.
- Services start with identifying the person through outreach, engagement, assessment. Then developing a plan appropriate to their presenting problem. Case management services may include: family reunification, linkages to benefits, food, medical/mental health, shelter beds, permanent supportive housing and other pertinent supports
- The 2018 Beverly Hills Homeless Count documented 15 individuals, one make-shift shelter, and one van. In recent years, the number of homeless people in Beverly Hills has declined from 42 homeless individuals in 2009, 37 individuals in 2011, 37 individuals in 2013, 29 individuals in 2015, 14 individuals in 2016 and 22 individuals in 2017.

# Community Assistance Grant Funding - Populations Served



## Services for Older Adults Living in Beverly Hills

- Affordable Living for the Aging: Matches roommates with local seniors seeking additional monthly income by renting a room in their home.
- Beverly Hills Active Adult Club: Assists local seniors with opportunities for entertainment, education, wellness, and social activities at Roxbury Park.
- Jewish Family Service of Los Angeles: Provides case management for residents 55 and older.
- Bet Tzedek Legal Services: Pro bono legal services for seniors living in Beverly Hills.



## Homeless All Ages

- All Saints' Episcopal Church: Provides weekly hot meals, case management, and alternatives to living on the streets.
- People Assisting the Homeless: Provides "a hand up, not a handout"; shelter beds for chronically homeless individuals in our community.
- Step Up on Second: Providing help, hope, and home for individuals experiencing mental health issues.



## General Community

- BH CPR: Provides training in life saving techniques of CPR, as well as the use of AED's (automated external defibrillators), first aid and how to assist a choking victim.
- Bet Tzedek Legal Services: Pro bono housing legal services for individuals living in Beverly Hills.
- Beverly Hills Education Foundation: Supports the Beverly Hills Unified School District through fundraising and events.
- Chiron Center: Provides 24/7 on scene support, information, and referral to Beverly Hills Community members affected by trauma or serious loss during the initial hours after a critical incident.
- ETTA: Provides supportive services to individuals with special needs and their families.
- The Maple Counseling Center: Sliding scale mental health counseling.
- Saban Community Clinic: Free medical and dental care, behavioral and social services for people in need.
- Westside Food Bank: Purchases food in bulk and collects donated food for distribution to economically vulnerable people on the Westside.

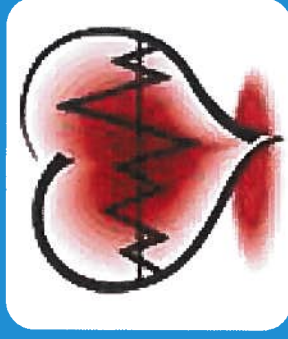


## Cultural Grants

- Theatre 40: Produces theatre productions in Beverly Hills.
- Wallis Annenberg Center for Performing Arts: Provides theatre, dance, music, and educational programs in Beverly Hills.

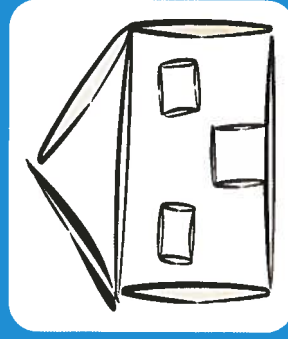


# Community Assistance Grant Funding - Social Service Safety Net



## Services for *Urgent* Needs

- **BH CPR:** Provides training in life saving techniques of CPR, as well as the use of AED's (automated external defibrillators), first aid and how to assist a choking victim.
- **Chiron Center:** Provides 24/7 on scene support, information and referral to Beverly Hills Community members affected by trauma or serious loss during the initial hours after a critical incident; services are requested by BH Police and Fire.



## Services to *Stabilize* Housing, Health, and Wellness

- **Affordable Living for the Aging:** Matches roommates with local seniors seeking additional monthly income by renting a room in their home.
- **All Saints' Episcopal Church:** Provides weekly hot meals, case management, and alternatives to living on the streets.
- **Jewish Family Service of Los Angeles:** Provides case management for residents 55 and older.
- **The Maple Counseling Center:** Sliding scale mental health counseling.
- **People Assisting the Homeless:** Provides "a hand up, not a handout"; shelter beds for chronically homeless individuals in our community.
- **Saban Community Clinic:** Free medical and dental care, behavioral and social services for people in need.
- **Step Up on Second:** Providing help, hope, and home for individuals experiencing mental health issues.



## Services to *Enhance* Quality of Life

- **Beverly Hills Active Adult Club:** Assists local seniors with opportunities for entertainment, education, wellness, and social activities at Roxbury Park.
- **Beverly Hills Education Foundation:** Supports the Beverly Hills Unified School District through fundraising and events.
- **Westside Food Bank:** Purchases food in bulk and collects donated food for distribution to economically vulnerable people on the Westside.

## **Attachment 2**

# Community Assistance Grant Funding

FY 18/19 Requests

1	2	3	4	6	7	8	9	10	11
Organization Name	Funding History	Service Provided	City Funding Began	2016/17 Allocation	2017/18 Allocation	2018/19 Request	Allocations In Budget	HRC Funding Recs	City Council Liaison Funding Recs
Affordable Living for the Aging	Ongoing	Roommate matching for older adults to age in place	2015	\$8,500	\$8,500	\$8,500	\$8,500	\$8,500	
All Saints' Homeless Assistance Program	Ongoing	Homeless Assistance, Case Management, and Bus Tokens	2003	\$21,000	\$24,000	\$29,000	\$24,000	\$26,000	
American Lung Association	New	Smoking Cessation	N/A	N/A	N/A	\$10,000	\$0	\$0	
Bet Tzedek Legal Services	Ongoing	Legal Services	N/A	N/A	\$110,000	\$110,000	\$110,000	\$110,000	
Beverly Hills Active Adult Club	Ongoing	Senior Activities Club	1974	\$17,000	\$17,000	\$18,000	\$17,000	\$18,000	
*** Beverly Hills CPR	Ongoing	CPR Education and Training	2009	\$50,000	\$50,000	\$60,000	\$50,000	\$60,000	
*** Beverly Hills Education Foundation	Ongoing	Fundraising Activities for School District	2006	\$20,000 In-Kind Only	\$20,000 In-Kind Only	\$25,000 In-Kind Only	\$25,000 In-Kind Only	\$25,000 In-Kind Only	
**Cedars- Sinai Medical Care Foundation	New	Smoking Cessation	N/A	N/A	N/A	\$8,000	\$0	\$8,000	
Chiron Center Inc.	Ongoing	Crisis Response Team	2011	\$30,000 And In-Kind	\$30,000 And In-Kind	\$30,000 And In-Kind	\$30,000 And In-Kind	\$30,000 And In-Kind	
***** Covia/Episcopal Senior Communities	New	Senior Companion Program & Telephonic Senior Programming	N/A	N/A	N/A	\$45,000	\$10,000	\$30,000	
**** ETTA		Families & Individuals w/ Special Needs	2017-18	NA	\$10,000	\$25,000	\$10,000	\$30,000	
Housing Rights Center	New	Legal Services	N/A	N/A	N/A	\$55,000	\$0	\$0	
Jewish Family Service	Ongoing	Service for Beverly Hills Seniors	2005	\$250,000	\$250,000	\$275,000	\$250,000	\$275,000	

## FY 18/19 Requests

- \* Cultural Applicant
- \*\* Late Application
- \*\*\* Increase of ask after application deadline
- \*\*\*\*\* Staff recommended \$5000 less than the HRC

\*\*\*\* Staff recommended \$5000 less than the HRC



## **Attachment 3**



### **Program Proposals**

1. Affordable Living for the Aging
2. All Saints' Homeless Assistance Program
3. American Lung Association
4. Bet Tzedek
5. Beverly Hills Active Adult Club
6. Beverly Hills CPR
7. Beverly Hills Education Foundation
8. Cedars-Sinai Medical Care Foundation
9. Chiron Center, Inc.
10. Covia/Episcopal Senior Communities
11. ETTA
12. Housing Rights Center
13. Jewish Family Service of Los Angeles
14. Loving Home Hospice
15. People Assisting the Homeless (PATH)
16. Saban Community Clinic
17. Step Up on Second
18. The Maple Counseling Center
19. Theatre 40
20. Wallis Annenberg Center for the Performing Arts
21. Westside Food Bank

TAB

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## APPLICATION SUMMARY FY 2018/19

**Agency:** Affordable Living for the Aging

**Requested amount:** \$8,500

**History of City funding:** 2015/16: \$6,500; 2016/17: \$8,500; 2017/18: \$8,500

**Agency description:** Housing matching program promotes independent living for older adults and supports aging in place.

**Proposed use of Community Assistance Grant Funds:** Recipient proposes to match older adults to share homes. Affordable Living for the Aging (ALA) will work with older adult residents (renters and owners) in Beverly Hills who have an extra bedroom and are willing to share their home as a way to: 1) boost monthly income, 2) increase social support. ALA staff conducts home visits, assessments, background screening and reference checks to ensure participants receive introductions to reliable roommates. After introductions, staff provides coaching, monitor a trial period, and assist with a written agreement on the terms of the living arrangement.

**Target population/Primary service:** Older adult residents (home owners and renters).

**Percentage of total program utilized by Beverly Hills residents/community:** In the first six months of FY 2017-2018, ALA enrolled four Beverly Hills residents into the Shared Housing Program. This represents 6% of service users.

**Quantifiable Services and Measures:** In the first six months of FY 2017-2018, ALA enrolled four Beverly Hills residents into the Shared Housing Program.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

Older adults living on fixed incomes are particularly vulnerable to rent increases and costs associated with changes in health status and independence. By having a roommate, older adults gain extra income and benefit from companionship.

**Percentage of annual funding City's contribution represents:** \$8,500 represents .4% of ALA's total revenue and income of \$2,148,782.

**Ratio of administrative to operating costs:** 12% are administrative.

**Service Profile:** Needs-based ☐ Quality of life-based ☐ Social Service ☒

Health ☐ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	AFFORDABLE LIVING FOR THE AGING / SHARED HOUSING
ADDRESS:	2029 Century Park East. Ste. 4393 Los Angeles, CA 90067
CONTACT PERSON:	Miriam Hall, Program Director
PHONE:	213-261-3862
FAX:	213-989-1630
EMAIL:	Miriam@alaseniorliving.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3      ☐ We are in a partnership with a 501c.3  
  
☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.
2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

Affordable Living for the Aging offers shared housing services for isolated and financially vulnerable seniors. The program matches seniors together to share homes. This model provides another option for people who cannot afford high housing costs and for seniors living alone who require additional support to remain safely at home. The Shared Housing Program is both an aging-in-place initiative and an important intervention for easing the city's housing affordability challenges.

Service delivery includes:

- Home visits
- One-on-one interviews
- Applicant screening (reference check, income verification, background check)
- Counseling to establish expectations and set program guidelines
- Client introductions
- Overseeing completion of the Roommate Agreement
- Monitoring the match to offer ongoing support

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

Shared housing services are critical at a time when aging residents are at-risk of isolation and falling through the cracks with no one to check-in on them or connect them to services. Having a roommate and companion gives older adults access to socialization, informal support, and the security of having someone around in case of an emergency. In addition to offering companionship, ALA roommates can assist with transportation, meal preparation, and chores around the home. These basic activities are often the difference between someone being able to stay at home or having to consider other living arrangements. Seniors who accept roommates report feeling a greater sense of security that there is someone to whom they can turn for help.

For residents who cannot afford the cost of fair market rents, becoming a roommate is an opportunity to offer meaningful assistance to an older adult in exchange for housing accommodations they can afford.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

In the first six months of the 2017-2018 contract year ALA enrolled four Beverly Hills residents into the Shared Housing Program. This represents 6% of service users.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

ALA requests \$8,500 for the funding year beginning on July 1, 2018. If the program continues to fill an unmet need and receives new referrals from the City then ALA will consider reapplying in future funding cycles.

6. What percentage of your annual funding would the City's contribution represent?

$\$8,500 / \$2,148,782 = 0.4\%$

7. What is the ratio of your organization's administrative operating costs to total gross operating budget?

12%

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.

Please see attachments.

- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal.

ALA's leadership team cares deeply about ensuring that residents of Beverly Hills and all aging Angelinos have the opportunity to age with dignity. An extension of ALA's partnerships with the City and its network of community agencies will allow ALA to respond to residents' need for companionship and affordable housing.

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

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## APPLICATION SUMMARY FY 2018/19

**Agency:** All Saints' Homeless Assistance Program

**Requested amount:** \$29,000

**History of City funding:** 2003/4: \$1,200; 2004/5: \$1,200; 2006: \$6,200; 2007: \$1200/bus tokens and \$8,800; 2008/9: \$1200/tokens and \$9,100; 2009/10: \$10,300; 2010/11: \$9,300; 2011/12: \$9,300; 2012/13: \$9,300; 2013/14: \$9,300; 2014/15: \$18,000; 2015/16: \$18,000; 2016/17: \$21,000; 2017/18: \$24,000

**Agency description:** Faith-based organization providing non-sectarian homeless assistance through comprehensive services not currently provided by local government.

**Proposed use of Community Assistance Grant Funds:** Recipient shall use the funds to operate the Homeless Assistance Program including items such as food, hygiene supplies, transportation, rent payment, and Project Homecoming. These resources will be available to the City's Changing Lives and Sharing Places (CLASP) homeless outreach team for use with their clients. The church provides a hot meal on Mondays which serves as a site for CLASP to engage homeless and at-risk individuals and link to services.

With the \$29,000 in funding, All Saints would support two primary initiatives. First, \$21,000 would be allocated toward emergency housing, "Project Homecoming" and supportive pastoral counseling. Second, \$8,000 would be allocated toward the Monday Meal (Homeless Assistance Program) at All Saints' to help fund food and hygiene supplies.

**Target population/Primary service:** Homeless and working poor; fills gap in service and safety net; housing stability assistance and navigation to available social services.

**Percentage of total program utilized by Beverly Hills residents/community:** More than 5% of people served are low or fixed income Beverly Hills residents in need of meals provided each week.

**Quantifiable Services and Measures:** The Monday Meal serves over 100 meals per week, with a team of 30 volunteers.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

The All Saints' Homeless Assistance Program began in 1992 with four people and two guests, and now serves over 100 guests each week, with a team of 30 volunteers. They are known as a safe haven where homeless individuals come every Monday for a hot meal, companionship and support. All Saints' attends the monthly Beverly Hills Homeless Collaboration and participates in case coordination to minimize duplication of service and expedite linkages to resources.

**Percentage of annual funding City's contribution represents:** The requested funding amount of \$29,000 represents approximately 20% of the costs associated with supporting the Homeless Assistance Program; the dedicated use of facilities on Monday (kitchen, parish hall, classrooms, patio, restrooms and chapel), and storage space for clothing and supplies.

**Ratio of administrative to operating costs:** 15%

**Service Profile:** Needs-based ☒ Quality of life-based ☒ Social Service ☒

Health ☐ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☒ All Saints is a religious non-profit organization which derives its 501c.3 status as an entity of The Episcopal Church (Documentation provided)



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	All Saints' Homeless Assistance
ADDRESS:	504 N. Camden Drive, Beverly Hills, CA 90210
CONTACT PERSON:	Rev. Scott Taylor
PHONE:	(310) 275-0123 x116
FAX:	
EMAIL:	staylor@allsaintsbh.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3 ☐ We are in a partnership with a 501c.3

☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

Since 1992, the All Saints' Homeless Assistance Program has been feeding hungry and homeless people. The All Saints' program provides a comprehensive array of services that are essential to the homeless population and are not currently provided by local government agencies. The church provides a hot healthy meal on Monday, as well as on-demand food during the week. We distribute hygiene supplies, clean clothes including coats at the annual Martin Luther King, Jr. Day Coat Drive, and bus tokens upon request. We will continue to offer these services in 2018-2019.

Emergency housing funds are an important safety feature provided by All Saints'. As part of our commitment to "housing first" we work with the City to identify appropriate individuals that could access housing if given immediate financial support. In partnership with the City, we also assist individuals with various needs, from clothing to medical. Last year "Project Homecoming" in partnership with the city was successful in reuniting several individuals with families that could provide permanent housing.

In the 2017-2018 grant year, we deepened our social services offerings and provided pastoral counseling to people that were vulnerable to homelessness. Last year pastoral counseling and social assistance was provided to many individuals who were on the verge of losing their housing. Although other agencies provide therapy, no other partner provides long-term pastoral counseling with an objective of preventing imminent homelessness. This year many people are experiencing evictions and we anticipate an increased need.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

All Saints' is known as a safe haven where the homeless gather every Monday for food, hygiene supplies, fellowship, and pastoral support. All Saints' is committed to an all-encompassing, collaborative approach, working with the City and non-profit agencies to reduce chronic homelessness.

We provide a venue for the homeless outreach team (CLASP) from Step Up On Second to meet and interact with its client base. We work with the Beverly Hills Homeless Collaboration committee and research the current needs of the homeless in Beverly Hills. All Saints' works with the city to reduce panhandling, by promoting "positive change, not spare change."

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

All Saints' Homeless Assistance Program is open to all who wish to participate, including those at risk for homelessness, the homeless, and the food insecure. Given the longevity of the program, we believe we interact in some way with many of the homeless individuals in the city. In addition to serving the homeless and the transient homeless in the city, approximately 5% of those served are Beverly Hills residents who subsist on low, fixed incomes, and who are in need of the meals, clothing, and other services we provide each week. We believe that funding for long-term supportive pastoral counseling would help prevent homelessness.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

All Saints' is requesting \$29,000 for 2018-2019. At this level we would be able to support two primary initiatives. First, we would allocate \$21,000 towards emergency housing, long-term supportive pastoral counseling, and "Project Homecoming." These funds would be available throughout the 2018-2019 cycle. At the end of the cycle, any unused housing funds would be directed towards All Saints' Homeless Assistance Program.

Second, we would allocate \$8,000 to the Monday Meal (Homeless Assistance Program) at All Saints' to help fund hygiene supplies and food. The church funds the Monday Meal through an operating budget of \$30,000, which does not include staff, overhead, insurance, etc. The Monday Meal is the largest of our many outreach programs, and represents a very important part of our parish life. We anticipate continuing the program for years to come, and being a useful partner to the City's efforts. We will be applying for future cycles.

6. What percentage of your annual funding would the City's contribution represent?

The requested funding amount would represent about 20% of the actual costs associated with supporting the program. This includes direct expenditures for food, hygiene supplies, clothing, bus tokens, and cash disbursements for rent and housing assistance, as well as the administrative overhead associated with running the program, including the allocation of personnel and facilities costs.

7. What is the ratio of your organization's administrative operating costs?

The administrative/operating ratio for All Saints' is projected to be 15%.

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

All Saints' Homeless Assistance Program, known as the Monday Meal, began in 1992 with the goal of providing a meal to the City's homeless. Today the program has grown far beyond a basic meal to a program that attempts to address several aspects of the problem of homelessness.

The Monday Meal coordinator, Josh Paget, demonstrates All Saints' commitment to assisting at-risk residents and guests. Rev. Scott Taylor, a board-certified clinical chaplain and pastoral counselor (certified by the College of Pastoral Supervision and Psychotherapy), provides pastoral counseling and supervise the grant.

It takes many organizations working together to address the problems of homelessness. All Saints' has demonstrated its ability to work with the City and function as a partner for identification, support, and follow-through, and to provide for the most basic needs of the City's homeless. We are excited about working with the City on providing emergency housing funds and home reunification through Project Homecoming, and also pastoral counseling for residents and guests who are vulnerable to becoming homeless without additional support. We look forward to continuing to work with the City to identify ways to make these services available to all who need them.



Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☐ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

TAB 3

## APPLICATION SUMMARY FY 2018/19

**Agency:** American Lung Association

**Requested amount:** \$10,000

**History of City funding:** First time applicant

**Agency description:** The American Lung Association (ALA) is the leading organization working to save lives by improving lung health and preventing lung disease, through research, education and advocacy. Their work is focused on five strategic imperatives: to defeat lung cancer; to improve the air we breathe; to reduce the burden of lung disease on individuals and their families; to eliminate tobacco use and tobacco-related diseases; and to accelerate fundraising and enhance organizational effectiveness to support the urgency of our mission.

**Proposed use of Community Assistance Grant Funds:** ALA would like to partner with the City to offer Freedom From Smoking ®, a comprehensive evidence-based tobacco cessation program. Freedom From Smoking ® is a proven-effective gold standard smoking clinic program, which has successfully helped smokers quit for over 40 years, and boasts a 57% quit rate at six months when used in combination with a quit-smoking medication. Finally, this program has been ranked as the most effective smoking cessation program in a study by the Fordham University Graduate School of Business.

The program is available in a variety of formats, and ALA proposes to implement the highly interactive online behavioral change program, Freedom From Smoking ® Plus. The funding would provide free membership to 100 identified Beverly Hills residents valued at \$99.95 per individual. The enrolled residents would receive a 12 month membership that includes the online smoking cessation program and continuous telephonic support from the ALA's treatment counselors. The ALA will also provide 100 American Lung Association Freedom From Smoking ® Self Help Guides for the City to disseminate.

**Target population/Primary service:** Residents of Beverly Hills who are trying to quit smoking

**Percentage of total program utilized by Beverly Hills residents/community:** N/A – First time applicant.

**Quantifiable Services and Measures:** Will be able to quantify and measure impact based on enrollment and services provided.

**Current Performance:** N/A – First time applicant.

**General Comment(s)** *(e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):*

This is American Lung Association's first application for CAGF support.

The Centers for Disease Control and Prevention (CDC) research shows that nearly seven out of ten adult smokers would like to stop smoking, and more than five out of ten adult smokers have made an attempt to quit in the past year. However, the CDC's research shows that only 4-7% of smokers who attempt to quit without support (cold turkey), are successful in remaining



smokefree for one year. In their application, ALA cites that by enrolling in a behavioral counseling program, residents can double their chances of success.

According to the ALA, of the 34,000+ residents in Beverly Hills, 78% of residents are above the minimum legal age to purchase tobacco and nicotine products. The adult smoking prevalence in the City of Beverly Hills is 8%, which accounts for over 2,000 residents who would be in need of smoking cessation services.

**Percentage of annual funding City's contribution represents:** The request for \$10,000 would represent 0.11% the American Lung Association in California's annual funding.

**Ratio of administrative to operating costs:** 17% are administrative.

**Service Profile:** Needs-based ☐ Quality of life-based ☐ Social Service ☐

Health ☒ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☒ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	American Lung Association
ADDRESS:	3325 Wilshire Blvd #900, Los Angeles, CA 90010
CONTACT PERSON:	Daisy Ly
PHONE:	310-735-9857
FAX:	866-881-7865
EMAIL:	daisy.ly@lung.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3 ☐ We are in a partnership with a 501c.3

☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

American Lung Association would like to partner with the City of Beverly Hills to offer a comprehensive evidence-based tobacco cessation program to the community which has recently implemented several vital smokefree policies. Freedom From Smoking® is a proven-effective gold standard smoking cessation clinic program, which:

- Has successfully helped smokers quit for over 40 years
- Boasts a 57% quit rate at 6 months when used in combination with a quit-smoking medication
- Is ranked most effective smoking cessation program in a study by Fordham University Graduate School of Business

The program is available in a variety of different formats to meet the needs of any population, including Freedom From Smoking® Plus. This course is a highly-interactive online behavioral change program that addresses today's mobile lifestyles available on desktop, laptop, tablet, and smartphones. Users receive membership that includes an online cessation program to assist an individual in a step-by-step quitting process at their own pace, along with continuous telephonic support from American Lung Association's tobacco treatment counselors. Freedom From Smoking® Plus provides a certificate of completion, is ACA compliant, and offers a tracking system that allows the City of Beverly Hills to track their memberships and progress of completion by community members. This provides instant access to ongoing data collection and outcome measures to prove the effectiveness and impact this program is having on your population served.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

With the recent smokefree policy implementation in Beverly Hills, it is crucial that residents are provided with a comprehensive tobacco cessation service to support their efforts to quit. Centers for Disease Control and Prevention research shows that nearly 7 in 10 adult smokers want to stop smoking. More than 5 in 10 adult smokers have made a quit attempt in the past year. Unfortunately, the majority of those individuals will return to smoking without the right plan in place. Only 4 to 7 percent of smokers who attempt to quit cold turkey (without support) are successful in remaining smokefree for one year. By enrolling in a behavioral counseling program, residents can double their chances of success.

If the City of Beverly Hills were to make Freedom From Smoking Plus memberships available to their residents, they would remove any barriers to accessing effective cessation programming, help to reduce the impact tobacco use has on our community both through decreased initiation rates among youth and lowered smoking prevalence rates among adults, improve overall health, decrease chronic illness, disease and death and provide an overall healthier and cleaner environment for all.

Of the 34,000+ residents in Beverly Hills, 78% of residents are above the minimum legal age to purchase tobacco and nicotine products. The adult smoking prevalence in the City of Beverly Hills is 8% (while lower than overall smoking prevalence in California at 11%) accounts for over 2,000 residents who are in need of smoking cessation services.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

Although Freedom From Smoking has been successful in helping individuals quit for over 40 years it is not a program currently implemented and utilized by members of the Beverly Hills community. American Lung Association feels that Freedom From Smoking Plus would be a tremendous benefit to partner with the recently passed smokefree policies. It is anticipated that 5,500 community members Nationwide will benefit from Freedom From Smoking Plus this year. Although the City of Beverly Hills would be a small percentage to the overall nationwide population utilizing this service, those residents to enroll will benefit from a network of others on the same journey to freedom throughout the entire state of California as well as coast to coast.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

The American Lung Association would like to request \$10,000 between July 1, 2018 through June 30, 2019 to implement the Freedom From Smoking Plus program within the City of Beverly Hills. If, within the first year of implementation, this program receives an overwhelming response from the community and after close examination of data collection and outcome measure results proving its success, we would plan to reapply during future cycles to continue to ensure this program is made available to residents as a comprehensive benefit.

The funding would provide FREE membership to Freedom From Smoking Plus to 100 identified Beverly Hills residents valued at \$99.95 per individual. Residents enrolling in Freedom From Smoking Plus will receive a 12 month membership that includes the online cessation program and continuous telephonic support from the American Lung Association's tobacco treatment counselors. Freedom From Smoking Plus memberships are valid for two years after date of purchase.

In addition, the City of Beverly Hills can support residents who prefer an offline system or who are not ready to start their online membership via the American Lung Association Freedom From Smoking® Self-Help Guide. The American Lung Association will provide 100 Guides (\$5.99/Guide) for the City of Beverly Hills to disseminate.

6. What percentage of your annual funding would the City's contribution represent?

The Community Assistance Grant Funding (\$10,000) would represent 0.11% of the American Lung Association in California's annual funding.

7. What is the ratio of your organization's administrative operating costs?

The American Lung Association in California's administrative operating costs is 17%.

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

The American Lung Association was solicited by City of Beverly Hills staff to apply for grant funding to provide tobacco cessation services to residents.

The American Lung Association's mission is to save lives by improving lung health and preventing lung disease. The Lung Association has been addressing the lung health needs of the American public since 1904. As America's oldest voluntary health organization, the Lung Association is among the first to tackle smoking as the nation's greatest preventable health risk, and to make the connection between air pollution and lung disease. With a community-based presence in all fifty states and the District of Columbia, the American Lung Association continually seeks to collaborate with other organizations and agencies that are committed to lung health.

As of July 1, 2017, the American Lung Association and all affiliates have merged into a one-tiered national organization to maximize mission impact and increase organizational effectiveness. Prior to this date, the American Lung Association in California operated under a separate tax ID as an affiliate of the American Lung Association. Both 501c3 IRS Determinations Letters have been submitted at the recommendation of Beverly Hill staff. The 990 for Lung Association in California is provided as it reflects our local impact.

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
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TAB 4

## APPLICATION SUMMARY FY 2018/19

**Agency:** Bet Tzedek

**Requested amount:** \$110,000

**History of City funding:** 2017/18: \$110,000

**Agency description:** Bet Tzedek (BT), The House of Justice, provides free legal assistance to thousands of people who would otherwise be denied access to the legal system. For more than 30 years, BT has been the exclusive provider of free legal services to seniors and caregivers for the City and County of Los Angeles under the Older Americans Act. BT's staff are the regional experts on senior legal needs and provide a full complement of services: representation, advice, outreach, self-help information and impact litigation.

**Proposed use of Community Assistance Grant Funds:** In FY 2018-19, Bet Tzedek proposes to deepen their presence in Beverly Hills, and expand their and expand their ability to reach all eligible residents in need. Bet Tzedek proposes \$50,000 for their Senior Legal Services Program and \$60,000 for their Housing Rights Legal Services, totaling \$110,000. Program components include:

Intake: through the following channels - a dedicated Beverly Hills intake line, and in person at Roxbury Park Community Center (La Cienega Community Center will also be utilized if needed).

Legal Services: will include brief advice and counsel, advocacy, and limited and full scope representation on the following:

- **Senior Legal Services:** Bet Tzedek offers the only senior-focused legal services program in LA County and boasts one of the largest elder law practices in the nation. Services include the following: 1. Public Benefits (state and federal programs, improper denials, reductions, terminations and overpayments of benefits including Social Security, Medi-Cal, In Home Supportive Services KinGAP/ guardianships, and veteran benefits); 2. Family Caregiver Services (conservatorships, guardianships, long-term care planning such as wills, power of attorney, advance healthcare directives); 3. Elder Abuse Services; 4. Holocaust Survivor Services; 5. Conservatorship Clinics; 6. Real Estate Tittle Fraud
- **Housing Rights Legal Services:** In January 2017, when the City revised the Rent Stabilization Ordinance, the need for pro bono housing rights legal services grew. Bet Tzedek fills this need by addressing the following tenant focused legal issues 1. Rights and Responsibilities under the BH Municipal Code; 2. Tenant-Landlord Issues (e.g. rent payment, rent increases security deposit issues, lease violations and tenancy terminations); 3. Housing Conditions (habitability).

Educational Outreach: in the community regarding their services and how to seek assistance. Outreach will be held at the Beverly Hills Public Library, La Cienega Park Community Center, and Roxbury Park Community Center.

**Target population/Primary service:** Seniors and their family caregivers, living in Beverly Hills (Senior Legal Services Program), and individuals in need of tenant landlord legal services living in Beverly Hills (Housing Rights Legal Services Program).

**Percentage of total program utilized by Beverly Hills residents/community:** Since receiving CAGF support in the first half of this fiscal year, Bet Tzedek's Beverly Hills caseload has increased by 42%

**Quantifiable Services and Measures:** Since receiving CAGF support in the first half of this fiscal year, Bet Tzedek's has opened 27 cases (1% of cases opened agency wide) for Beverly Hills residents qualifying under the grant. Bet Tzedek anticipates that the numbers will continue to grow as the beginning of the funding period was focused on developing the program.

**Historical Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

When tenants have access to legal aid, they experience better housing outcomes. Bet Tzedek cites a study which found that 51% of tenants in eviction proceedings without attorneys lost their homes, while only 21% with attorneys lost possession. Even when an attorney cannot prevent an eviction, their involvement makes a vital difference, helping to negotiate a "soft landing" which is can be critical to preventing homelessness.

By the year 2030, the number of seniors in LA County is expected to more than double. With one of the largest senior populations and one of the highest median ages in the County, Beverly Hills is disproportionately impacted. Aging seniors often face complex financial, legal and social issues, and without legal assistance, can severely undermine their quality of life. Seniors face elder abuse and cognitive decline which are two issues that require legal assistance. Additionally, complex matters related to housing and public benefits may also require legal expertise.

**Percentage of annual funding City's contribution represents:** A grant in the amount of \$110,000 represents 1.4% of BT's projected current fiscal year revenue of \$7,809,967.

**Ratio of administrative to operating costs:** 4% are administrative.

**Service Profile:** Needs-based ☒ Quality of life-based ☐ Social Service ☒

Health ☐ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐





CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Bet Tzedek - Senior Legal Services Program & Housing Rights Legal Services Program
ADDRESS:	3250 Wilshire Blvd. 13th Floor
CONTACT PERSON:	Sarah Jampol
PHONE:	323-648-4711
FAX:	213-4714570
EMAIL:	<a href="mailto:sjampol@bettzedek.org">sjampol@bettzedek.org</a>

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3      ☐ We are in a partnership with a 501c.3  
☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.
2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

See Attached.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

See Attached.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

See Attached.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

See Attached.

6. What percentage of your annual funding would the City's contribution represent?

See Attached.

7. What is the ratio of your organization's administrative operating costs?

See Attached.

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

See Attached.

Submission of the following documents is required:

- ☒ Completed CAGF application,
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- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

## **2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?**

In FY 2017-18, the City of Beverly Hills filled a tremendous gap in service by awarding Bet Tzedek its first Community Assistance Grant Funding to provide senior legal services and housing rights legal services to eligible residents. With this request, we seek renewed funding to continue this important partnership, a partnership that ensures the City's most vulnerable community members – seniors and moderate-to-low-income renters – have access to vital, free legal services that address basic needs: housing, healthcare, government benefits, and protection from abuse.

In the first seven-months of the FY 2017-18 grant period, Bet Tzedek worked closely with the City's Human Services Division to develop and launch the City of Beverly Hills Housing Rights and Senior Legal Services Program. We secured staffing for the project, created a dedicated Beverly Hills intake line, developed program fliers, offered community intake, provided educational outreach, and assisted 27 clients from Beverly Hills.

In FY 2018-19, with continued support from the City of Beverly Hills, we hope to deepen our presence in Beverly Hills and expand our ability to reach all eligible residents in need. Program components will include:

### **1. Intake** through the following channels:

- **Telephone Intake:** Residents can call a dedicated, Beverly Hills intake line at Bet Tzedek to initiate services (323-939-0506, ext. 499). Calls are returned within 24-48 hours.
- **Community Intake:** In January 2018, Bet Tzedek began offering onsite intake at the Roxbury Park Community Center. Intakes occur every Monday from 10am-12pm. If a need exists, we may conduct some intakes at La Cienega Community Center.

### **2. Legal services** will include brief advice and counsel, advocacy, and limited- and full-scope representation on the following:

- **Senior Legal Services:**  
Bet Tzedek offers the only senior-focused legal services program in Los Angeles County, and boasts one of the largest elder law practices in the nation. Services include the following:
  - **Public Benefits:** Bet Tzedek helps seniors with a variety of state and federal government benefits programs (improper denials, reductions, and terminations, and/or overpayments of benefits), including appeals and waivers. Specific benefit programs include Social Security & Supplemental Security Income (SSI), Medi-Cal, In-Home Supportive Services (IHSS), KinGAP (Guardianships), and Veterans Benefits.
  - **Family Caregiver Services:** Bet Tzedek staff are the regional experts on legal issues of aging/disabled and frail seniors and their caregivers. Specific services include: conservatorships, guardianship, and long-term care planning (wills, powers of attorney, advance healthcare directives).

- Elder Abuse Services: BT is the only legal aid agency in LA County addressing the growing problem of elder abuse. Our team of legal specialists and staff social worker partner with mental health experts, law enforcement and others to address victims' holistic needs; and provide educational outreach to seniors to prevent abuse. Specific services include: elder abuse restraining orders; powers of attorney and revocations of; conservatorships; advance healthcare directives; and wills.
  - Holocaust Survivor Services: We remain one of just two legal aids in the nation helping aging survivors gain reparations from Germany and other nations. Survivors also receive wraparound elder law services to address holistic needs.
  - Conservatorship Clinic: Operating at 4 county courthouses, our clinic helps more than 1,400 families per year with the complex legal process of filing for conservatorships to protect and manage the personal and financial affairs of an aging/disabled loved one. Approximately 70% of the probate conservatorships filed in Los Angeles County are prepared at our clinics.
  - Real Estate Title Fraud: Bet Tzedek attorneys help elderly homeowners who wrongfully lost title to their home at the hands of scammers, family members, alleged "friends", and caregivers. Our team files lawsuits to return title to them and cancel fraudulent mortgages and liens so they remain in possession of their homes and can age in place.
- Housing Rights Legal Services:  
In January 2017, when the City of Beverly Hills courageously implemented more stringent tenant protections by revising the City's existing rent stabilization policy, the need for free housing rights legal services grew. Bet Tzedek fills this need by addressing the following tenant-focused legal needs for City residents:
    - Rights and Responsibilities under the Beverly Hills Municipal Code, including the Rent Stabilizations sections at Title 4, Chapters 5 and 6
    - Landlord-Tenant Issues (e.g., rent payment, rent increase, security deposit issues, lease violation and tenancy terminations)
    - Housing Conditions (habitability)

**3. Educational Outreach** in the community about our services and how to seek assistance. Outreach will be held at Beverly Hills Public Library, La Cienega Park Community Center, and/or Roxbury Park Community Center. In addition, we will distribute flyers about our services at presentations and throughout the City.

**3. Why are these services considered critical (e.g., enhanced quality of life, improve public safety)?**

Senior Legal Services:

Senior-focused legal services have never been more important. As baby boomers age and medical advancement lengthens life expectancy, the size of our senior population increases exponentially. In the next 20 years, the number of adults 65 yrs. or older will double. With one

of the largest senior populations (18.7%) and one of the highest median ages in the county, Beverly Hills is disproportionately impacted. City services address basic needs, but aging seniors often face complex medical, financial, and social issues, including age-related disabilities, cognitive decline, chronic health conditions, loss of income, and elder abuse. Without legal assistance, health, well-being, quality of life, and one's ability to age in place can be seriously undermined.

The tragic reality is that one in nine seniors age 65 and older has Alzheimer's; and one in three will die with it or some other form of dementia. Without legal plans and protections in place, as seniors lose the ability to care for themselves, they also lose the opportunity to ensure their wishes are honored regarding long-term healthcare, finances, and personal care. Bet Tzedek attorneys can help with long-term care planning (e.g., wills, powers of attorney, advance healthcare directives) before a senior loses capacity.

Elder abuse is another serious problem impacting seniors. The veil of silence shrouding this troubling issue makes it impossible to know the full extent of the problem, but estimates suggest that one in every 10 older Americans will be abused, though the actual number of victims is likely higher, as 4 out of 5 cases go unreported. Based on these estimates and the City's population figures, more than 2,500 seniors in Beverly Hills are abused annually. Elder abuse devastates lives--victims are at greatly increased risk of premature death, being admitted to a nursing home, hospitalization, illness, and depression. Elder financial abuse is particularly devastating; seniors rarely recoup losses and financial victimization often leads to isolation, loss of independence, reliance on public benefits, and illness. In Beverly Hills, where many seniors own homes with considerable equity, real estate title fraud is a serious threat. Because many seniors' only asset is their home, its loss is truly catastrophic, often leading to homelessness or premature institutionalization.

With more than 40 years of elder law expertise, Bet Tzedek's seniors legal services address the multifaceted needs of seniors. Our services improve long-term stability and help make it possible for seniors to remain independent and age with dignity.

#### Housing Rights Legal Services:

Housing security is fundamental to health and well-being. In Los Angeles County, however, where a housing affordability crisis continues to gain momentum, housing insecurity is a reality for more families than ever before. Rising rents, incomes that have not kept pace, and demand simply outpacing supply all contribute to the growing crisis and put more families at risk of homelessness. In the last year, homelessness rose 26% in Los Angeles County.

Recognizing a need to intervene, the City of Beverly Hills took a bold step to protect its more than 17,000 renters by revising existing rent stabilization policies in January 2017. Changes include a 3% cap on rent increases, relocation fees for no-cause evictions, and the creation of a rental registry program. These protections will have little impact, however, if tenants (and landlords) lack an understanding about their rights and where to seek assistance if rights are

violated. Educational outreach and access to free, legal services will be essential to ensuring these new protections are enforced.

When tenants have access to legal aid, they experience better housing outcomes – one study found that 51% of tenants in eviction proceedings without lawyers lost their homes, while only 21% with lawyers lost possession. Even when an attorney cannot prevent an eviction, their involvement makes a vital difference, helping to negotiate a “soft landing” (e.g., extra weeks to move out or forgiveness of unpaid rent) can be critical to preventing homelessness in the wake of eviction. Legal aid can also help address and resolve issues related to housing conditions (habitability) that make a critical difference for tenants’ health, safety, and well-being.

Bet Tzedek’s Housing Rights Legal Services Program addresses the multifaceted housing rights issues impacting Beverly Hills tenants. In addition to direct legal services, the program provides educational outreach in the City to ensure the public is aware of their rights and where to seek aid.

**4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?**

Since receiving City of Beverly Hills Community Assistance Grant Funding, Bet Tzedek’s Beverly Hills client caseload jumped 42%. During the current 7-month grant period (07/01/2017-01/31/2018) we opened 27 cases (1% of cases opened agency wide). During the same period in the previous fiscal year, we opened just 19 cases. We anticipate this percentage increase will grow even more because much of the beginning of the grant period focused on developing the project (i.e., working with the City on program eligibility criteria, developing program fliers, and identifying and securing intake sites) and we have only recently been able to focus on outreach and client intake.

**5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?**

Bet Tzedek requests renewed support for the Seniors Legal Services Program and the Housing Rights Legal Services Program in the same amount received in FY2017-18:

Seniors Legal Services Program: \$50,000

Housing Rights Legal Services Program: \$60,000

**6. What percentage of your annual funding would the City’s contribution represent?**

Bet Tzedek’s FY18 budget is \$7,809,967. A grant in the amount of \$110,000 would represent 1.4% of our annual funding.

**7. What is the ratio of your organization’s administrative operating cost?**



Bet Tzedek's administrative operating cost is 6.2% of our overall budget.

**9. Provide any additional info that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.**

Bet Tzedek is extremely enthusiastic about continuing our partnership with the City of Beverly Hills to bring vital, safety-net services to vulnerable residents. In FY2017-18, we worked closely with the City to develop a program that will be accessible and effective for residents, now we are well-positioned to bring the project to scale and serve more residents in need. We thank the City for allowing us to submit this request for FY2018-19 Community Assistance Grant Funding in the amount of \$110,000.

TAB 5

## APPLICATION SUMMARY FY 2018/19

**Agency:** Beverly Hills Active Adult Club (BHAAC)

**Requested amount:** \$18,000

**History of City funding:** 1974-1995: \$12,000 annually in Recreation and Parks budget; 1995-1998: \$8,000; 1999: \$11,000; 2000-2007: \$8,000; 2008/9: \$8,200; 2009/10: \$2,000; 2010/11: \$5,500, 2011/12: \$5,500 plus supplemental funding of \$5,500 approved by City Council 12/6/11; 2012/13: \$11,000; 2013/14: \$11,000; 2014/15: \$15,000; 2015/16: \$15,000; 2016/17: \$17,000; 2017/18: \$17,000

**Agency description:** Provides quality leisure activities to the community's senior adults including social gatherings, entertainment, community forums, wellness and educational speakers, as well as leadership and volunteer opportunities. Exists under the auspices of the Community Services Department, but operates independently with its own elected Executive Board.

**Proposed use of Community Assistance Grant Funds:** Recipient shall use the funds for entertainment, socialization and recreation, wellness and educational speakers, leadership and volunteer opportunities for seniors.

**Target population/Primary service:** Active senior adults/quality leisure and a sense of belonging and helping others.

**Percentage of total program utilized by Beverly Hills residents/community:** The total Club membership is 257, of which 38% residents, 62% non-residents.

**Quantifiable Services and Measures:** The weekly meetings attract the largest senior adult attendance. Many of these attendees are also active in senior adult recreation, exercise and enrichment classes. The club is focused on promoting health education through its partnership with Cedars-Sinai.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** *(e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):*

The funding would allow the continuation of the very popular Monday entertainment and coffee social, holiday parties, several dances per year, supplemental funds for day trips and special events for current members. Increased funding is requested for an additional dance and to charter private buses for day excursions to increase the number of attendees. The club will continue to use its newly instituted photo membership card and charge a minimal fee (\$5 residents / \$7 non-residents).

This year, the Club provided an increase to the weekly entertainers by \$25 per week. The entertainers had not received an increase in over five years, which resulted in approximately \$2,575 in additional costs.

**Percentage of annual funding City's contribution represents:** 100%

**Ratio of administrative to operating costs:** No portion of the funding is used for administration as the services are provided by City staff.

**Service Profile:** Needs-based ☐ Quality of life-based ☒ Social Service ☒

Health ☒ Education ☐ Other ☒

**Agency Scope:** Local ☒ Regional ☐ National ☐ International ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Beverly Hills Active Adult Club
ADDRESS:	471 S. Roxbury Drive, Beverly Hills, CA 90210
CONTACT PERSON:	Patty Acuña and Les Bronte
PHONE:	310.285.6842
FAX:	310.553.3862
EMAIL:	pacuna@beverlyhills.org

Please type your answers to the following questions:

**1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?**

- ☐ We are a 501c.3      ☐ We are in a partnership with a 501c.3
- ☐ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

**2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?**

The Beverly Hills Active Adult Club (BHAAC) has been in existence for over 40 years. Based from the City of Beverly Hills Roxbury Park Community Center, BHAAC provides a social network of quality leisure activities to senior adults through Club gatherings, weekly musical entertainment, free community theater offerings, dances, community forums, wellness and educational speakers, philanthropic endeavors, as well as leadership and volunteer opportunities.

The BHAAC provides additional offerings that the City does not provide such as weekly entertainment, movie afternoons at both Roxbury and La Cienega Community Centers, special themed dances, individualized computer instruction, in addition to sponsoring Thanksgiving baskets to needy families. The Club also sponsors the senior knitters by purchasing yarn for the production of knitted hats and scarves that are donated to various groups. The Club also created the Donna Goldstein Volunteer Service Plaque, honoring longtime active member Donna Goldstein. The Award will honor and place other deserving member's names on the plaque who notably contribute their time and service towards the Club's mission.

**3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?**

Socialization and participation is vital to a senior adult's health and well-being and helpful to prevent isolation. The Club strives to provide a variety of opportunities to keep senior adults actively engaged mentally and physically, as well as being in the company of and assisting others. Participation in these activities at the Community Centers in Beverly Hills provides Club members and City staff the opportunity to get to know them, engage in conversation, and become aware if any health or safety concerns need to be addressed. At times, the Club serves as a safety net if a Club member stops coming to the weekly activities or events. Club members or the Board's Sunshine Committee have stepped in to call the Club member or family to check-in, make sure everything is OK, and encourage to return.

**4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?**

Current Club membership is 257 members comprised of 96 Beverly Hills residents and 161 non-residents or 38% residents and 62% non-residents. Membership indicates a slight decrease in members and the resident participation percentage. As Roxbury Community Center borders Los Angeles, many of the non-resident Club members are of walking distance from the Center and choose to be members here as opposed to other Los Angeles parks/community centers. Club members, both resident and non-resident can also be members of other Senior Clubs in locations such as Culver City and Pan Pacific where different programs of interest or excursions might be offered. The weekly Monday Entertainment is still the most popular program offered by the Club and attracts 60-80 members each week. Much of the Community Assistance Grant Funding is used to cover the weekly entertainment expense. The Club continues to charge a membership fee of \$5 for residents, \$7 for non-residents. Membership, along with the Community Assistance Grant allows free and/or lower cost for the weekly entertainment, dance admittance, class supplies, instruction costs, and excursion costs. The Club recently increased offering Bingo from one day a month to two days per month. The Club also is offering more full-day excursions. A trip to Palm Springs to see musical performances at the Cabaret Theater has sparked interest and many seniors have registered.

**5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?**

The Beverly Hills Active Adult Club kindly requests to increase grant funding by \$1,000 to a total of \$18,000 per year. This funding would allow for the continuation of the Monday entertainment program, three annual dances which include the expense of a big band orchestra. To maintain the quality of the entertainment that the members appreciate, an increase to the entertainer's fee

was approved by the Club's Board. The increase for weekly entertainment was increased by \$25.00 to \$175 per week. Special themed dances such as Halloween and Sumer Luau were increased to \$1,000. An increase to entertainers had not been provided in over 5 years. The increase results in approximately \$2,575.00 in additional annual expenses. In addition, the members enjoy refreshments at many of the events to attract larger participation. Supplemental funds for day excursions, class expenses, bi-monthly bingo and other special events have resulted in increased costs. Yes, the Club would continue to annually request funds.

**6. What percentage of your annual funding would the City's contribution represent?**

Club membership fees, \$5 residents, \$7 non-residents are the only other source of revenue for the Club which for the current fiscal year has brought in approximately \$1,560. The Annual Funding represents approximately 85-90% of the Club's funding. The Club's current balance as of December 31st, 2017 is \$13,370.49. In addition, the Club has earmarked the donations received last fiscal year in honor of past member Donna Goldstein which accounts for an additional \$3,500.

The Club also has a separate account of \$11,349.70 that is exclusively used each year to support the awarding of two \$500 scholarships to deserving Beverly Hills High School seniors.

**7. What is the ratio of your organization's administrative operating costs?**

The Beverly Hills Active Adult Club is operated under an elected board of volunteers. There are no direct administrative/operating costs.

**8. Financial Statement:**

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

**9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.**

The Club continues to thrive through collaborative efforts with Cedars-Sinai Medical Center to provide an Annual Senior Health Fair, the Beverly Hills Firefighters' Association for the Annual Thanksgiving Luncheon, and the Beverly Hills Police Officers' Association for a Valentine's Day Dance and Dessert event. Senior Recreation Supervisor, Patty Acuna, is the new City's Liaison to the Club overseeing the Club and Senior Adult activities and programs.

Submission of the following documents is required:

- ☐ Completed CAGF application,
- ☐ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☐ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City



TAB 6

## APPLICATION SUMMARY FY 2018/19

**Agency:** Beverly Hills CPR

**Requested amount:** \$60,000 and in-kind

**History of City funding:** 2009/10: \$50,000 and in-kind support (ten-year lease at \$1.00/year for space at City Hall); 2010/11: \$50,000; 2011/12: \$50,000; 2012/13: \$50,000; 2013/14: \$50,000; 2014/15: \$50,000 and in-kind.; 2015/16: \$50,000; 2016/17: \$50,000; 2017/18: \$50,000

**Agency description:** American Heart Association CPR instruction

**Proposed use of Community Assistance Grant Funds:** This year, BH CPR will be advancing their curriculum to include a national program, "Stop the Bleed," which will be taught to all students who register for a First Aid course, including Police, Fire and BHUSD staff. The funding will also be utilized to purchase additional equipment as required by the American Heart Association.

**Target population/Primary service:** Residents, workers in the community, students, teachers and school administrators, police and fire personnel and other first responders.

**Percentage of total program utilized by Beverly Hills residents/community:** During the 2017 calendar year, 60% of the classes were taught to the Police Department, Fire Department, City Staff and teachers and staff at Beverly Hills Unified School District.

**Quantifiable Services and Measures:** CPR, First Aid and defibrillator instruction to be provided.

**Current Performance:**

FY 17/18: (Q1 & Q2)      ☒ Satisfactory      ☐ Unsatisfactory

**General Comment(s)** (*e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations*):

BHCPR continues to expand their CPR classes, and in 2017, instructed over 7,000 individuals, and is in the top 20% in Los Angeles County.

**Percentage of annual funding City's contribution represents:** 40%

**Ratio of administrative to operating costs:** 12%

**Service Profile:** Needs-based ☐ Quality of life-based ☐ Social Service ☐

Health ☒ Education ☒ Other ☐

**Agency Scope:** Local ☒ Regional ☐ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	BEVERLY HILLS CPR
ADDRESS:	455 N REXFORD DRIVE
CONTACT PERSON:	LES BRONTE
PHONE:	310 281 2753
FAX:	310 550 5900
EMAIL:	CONTACT@BHCPR.ORG

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3      ☐ We are in a partnership with a 501c.3  
☐ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.
2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

BEVERLY HILLS CONTINUE TO EXPAND OUR CPR CLASSES AND THIS PAST YEAR TO HAVE INSTRUCTED OVER 7,000 INDIVIDUALS. WE ARE NOW IN THE TOP 20% IN LOS ANGELES COUNTY.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

THE COMPONENTS OF OUR CLASSES ARE LIFE SAVING.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

DURING THE CALENDAR YEAR OF 2017, 60% OF OUR CLASSES STUDENTS WERE STAFF AND TEACHERS FROM THE BEVERLY HILLS UNIFIED SCHOOL DISTRICT, POLICE AND FIRE DEPARTMENTS AND CITYSTAFF PERSONNEL.

IN ADDITION, WE TEACH STUDENT AND INSTRUCTORS FROM THE LOCAL PRIVATE SCHOOLS.

THE GRAND TOTAL OF STUDENT FOR THE CALENDAR YEAR WAS APPROXIMATELY 7000.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

WE ARE REQUESTING \$50,000 WHICH WILL FUND THE FOLLOW PROGRAMS:

ADVANCING OUR CIRCULLUM TO INCLUDE A NATIONAL PROGRAM CALLED "STOP THE BLEED. THIS CLASS WITH BE TAUGHT TO ALL STUDENT WHO SIGN UP FOR FIRST AID CLASSES INCLUDING POLICE, FIRE AND SCHOOL.

PURCHASING ADDITIONAL ADVANCE EQUIPMENT AS REQUIRED BY AMERICAN HEART.

6. What percentage of your annual funding would the City's contribution represent?  
FORTY PERCENT

7. What is the ratio of your organization's administrative operating costs?  
TWELVE PERCENT

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
  - b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.
-

9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

NOTE. OUR MOST RECENT FINANCIALS ARE ON FILE . WE HAD NOT ANY SOLICITATION CAMPAIGNS DURING FISCAL YEAR 2016 TO 2017.

WE ARE COMPLAINT WITH THE NEW INSTURANCE REQUIRENTS.

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☐ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☐ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

TAB  
7

## APPLICATION SUMMARY FY 2018/19

**Agency:** Beverly Hills Education Foundation (BHEF)

**Requested amount:** \$25,000 in-kind

**History of City funding:** [prior to *grant* funding, City provided General funds] 2006: \$10,000 (\$3,360 grant and \$20,000 in-kind "outside" the 2006-7 funding cycle); 2007: \$13,345 and \$20,000 in-kind; 2008/9: \$13,900 and \$20,000 in-kind; 2009/10: \$20,000 in-kind only; 2010/11: \$10,000 in-kind only (\$5,000 each for two scheduled events); 2011/12: \$10,000 in-kind only (\$5,000 each for two scheduled events); 2012/13: \$10,000 in-kind only (for one scheduled event); 2013/14: \$10,000 in-kind only (for one scheduled event); 2014/15: \$15,000 in-kind only; 2015/16: \$20,000 in-kind only; 2016/17: \$20,000 in-kind only; 2017/18: \$20,000 in-kind only

**Agency description:** BHEF provides funding to the Beverly Hills Unified School District to supplement public dollars allocated to the school district and allow for programs and services that enrich the quality of education that the schools could not otherwise afford.

**Proposed use of Community Assistance Grant Funds:** Requested funds will defray the costs of the street closures for events during the school year and enable them to direct their existing resources to the schools instead.

**Target population/Primary service:** Beverly Hills Unified School District.

**Percentage of total program utilized by Beverly Hills residents/community:** 100%

**Quantifiable Services and Measures:** BHSUD serves 4,000 families in the District.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** *(e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):*

Funds have historically been allocated as in-kind dollars meaning money is only "issued" when an event occurs. For the first time in several years, the allocated in-kind funds were utilized.

**Percentage of annual funding City's contribution represents:** 5%.

**Ratio of administrative to operating costs:** 15%

**Service Profile:** Needs-based ☐ Quality of life-based ☐ Social Service ☐

Health ☐ Education ☒ Other ☐

**Agency Scope:** Local ☒ Regional ☐ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐





CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Beverly Hills Education Foundation
ADDRESS:	255 S. Lasky Drive, BH 90212
CONTACT PERSON:	Krissy Austin
PHONE:	310-557-0651
FAX:	
EMAIL:	manager@bhef.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3 ☐ We are in a partnership with a 501c.3

☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

The Beverly Hills Education Foundation (BHEF) provides funding to the Beverly Hills Unified School District (BHUSD) to supplement public dollars allocated to the school district to provide for programs and services that enrich the quality of education that the schools could not otherwise afford. BHEF has several community events that offer activities for families and parents in the district. Because of our unique connection to community families and the schools, and the diverse composition of our Board of Directors, we create events and opportunities and provide funding for the schools not otherwise delivered by local government.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

BHEF helps the Beverly Hills public schools set the standard for excellence in education. BHEF provides funding to assist counseling services, library specialists, teachers, athletic opportunities, art programs, and summer school for the entire community and nearby area. The schools are central to the financial success of Beverly Hills and are crucial to our city. Maintaining their level of excellence is critical to this city's welfare.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

The BHUSD serves over 4,000 families in the district. Our events and programs are open to all residents in Beverly Hills and are enjoyed by many people who live in the city and may not currently have children in the schools, as well as those outside of the city.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

We are requesting \$20,000 for this funding cycle. This is in anticipation of a Fall, 2018 event and a Spring, 2019 event. Since we may have 2 or more events which may require street closures this year, we are hoping that we can use all the funding throughout the year to help defray the additional costs and enable us to increase funding to the schools.

6. What percentage of your annual funding would the City's contribution represent?

This grant covers direct city costs that were previously "waived" by the City in light of our support of the public schools of the City. It represents approximately 5% of our budget.

7. What is the ratio of your organization's administrative operating costs to total gross operating budget?

Our administrative/operating costs to what we earn are approximately 15%.

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.

b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal.

The following documents are required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☒ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

TAB 8

## APPLICATION SUMMARY FY 2018/19

**Agency:** Cedars-Sinai Medical Care Foundation

**Requested amount:** \$8,000

**History of City funding:** First time applicant

**Agency description:** The Cedars-Sinai Medical Care Foundation was formed to enhance the ability of the Medical Center to effectively and efficiently deliver health care services to the residents of Los Angeles County. In particular, the Medical Center believes the Foundation will further its charitable health care purposes by providing medical education, research, and various medical benefits to the community.

**Proposed use of Community Assistance Grant Funds:** CAGF funds would be used for Cedars-Sinai's Smoking Cessation Program for City residents. The Smoking Cessation Program offered by Cedars-Sinai offers one-on-one counseling with a clinical pharmacist, health information about smoking and the benefits of stopping, a smoking cessation plan that is tailored to individual needs, strategies for behavior modification and to control cravings, prescriptions for medications or nicotine replacement aids, when appropriate, and carbon monoxide level monitoring at each visit.

The Cedars-Sinai Smoking Cessation program is available to those who wish to participate at a cost of \$40 dollars per half-hour visit. Services are not covered by insurance. The program typically consists of a one-hour initial visit followed by five-to-six half-hour visits each month thereafter for a total of cost of approximately \$320 per patient that completes the program. Their total funding request is for \$8,000, which they estimate would provide the full program to approximately 25 residents.

**Target population/Primary service:** Smoking Cessation Counseling services to Beverly Hill residents

**Percentage of total program utilized by Beverly Hills community:** The Smoking Cessation Program at Cedars-Sinai is currently open to all who wish to participate. There is limited data to provide an estimate of how many patients are residents of Beverly Hills, as Cedars-Sinai services the regional community.

**Quantifiable Services and Measures:** Will be able to quantify and measure impact based on community participation numbers.

**Current Performance:** N/A - New Applicant

**General Comment(s)** *(e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):*

This is Cedars-Sinai Medical Care Foundation's first application for CAGF support.

Due to the City's recently adopted a Smoke-Free Multi-Unit Housing Ordinance, which prohibits smoking in all multi-family residences in Beverly Hills, the City Council expressed interest in offering a City-sponsored smoking cessation program. The City has researched

smoking cessation programs nearby Beverly Hills, and contacted Cedars-Sinai to submit an application for Community Assistance Grant Funding.

According to the United States Surgeon General's reports on smoking and health:

(1) There is no safe level of exposure to tobacco smoke. Any exposure to tobacco smoke—even an occasional cigarette or exposure to secondhand smoke—is harmful. (2) Damage from tobacco smoke is immediate. Tobacco smoke contains more than 7,000 chemicals and chemical compounds that reach the lungs when inhaled. Blood then carries the poisons to all parts of the body. These poisons damage DNA, which can lead to cancer; damage blood vessels and cause clotting, which can cause heart attacks and strokes; and damage the lungs, which can cause asthma attacks, emphysema, and chronic bronchitis. (3) Smoking longer means more damage. Both the risk and the severity of many diseases caused by smoking are directly related to how long the smoker has smoked and the number of cigarettes smoked per day. (4) Cigarettes are designed for addiction. The design and contents of tobacco products make them more attractive and addictive than ever before. Nicotine addiction keeps people smoking even when they want to quit. (5) Even low levels of exposure, including exposure to secondhand tobacco smoke, are dangerous. An individual does not need to be a heavy smoker or a long-time smoker to get a smoking-related disease or have a heart attack or stroke triggered by smoke.

Smoking remains the leading preventable cause of death and disease in the United States. Recent studies show that smokers who talk with a clinician about how to quit dramatically increase their chances of quitting successfully

**Percentage of annual funding City's contribution represents:** Not specifically stated in application. Per the 2015 Foundation 990 Form, there is \$365 million in revenue, thus the grant of \$8,000 would be estimate would be .0002% of annual funding.

**Ratio of administrative to operating costs:** .042%

**Service Profile:** Needs-based ☒ Quality of life-based ☐ Social Service ☐  
Health ☒ Education ☐ Cultural ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Cedars-Sinai Medical Care Foundation
ADDRESS:	200 N. Robertson Blvd., Suite 101
CONTACT PERSON:	Rachel Mashburn, PharmD, MPH
PHONE:	(310) 385-3534 option #3
FAX:	(310) 385-3577
EMAIL:	mashburnr@csmns.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3                      ☐ We are in a partnership with a 501c.3

☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

The City of Beverly Hills has implemented a number of smoke-free policies throughout the city over the past several years. Most recently, the City has adopted a Smoke-Free Multi-Unit Housing Ordinance, which prohibits smoking in all multi-family residences in Beverly Hills. In September 2017, the City Council expressed interest in offering a City-sponsored smoking cessation program. The City has researched smoking cessation programs nearby Beverly Hills and has contacted Cedars-Sinai to submit an application for Community Assistance Grant Funding.

The Smoking Cessation Program offered by Cedars-Sinai offers one-on-one counseling with a clinical pharmacist, health information about smoking and the benefits of stopping, a smoking cessation plan that is tailored to individual needs, strategies for behavior modification and to control cravings, prescriptions for medications or nicotine replacement aids, when appropriate, and carbon monoxide level monitoring at each visit.

The Cedars-Sinai Smoking Cessation program is available to those who wish to participate at a cost of \$40 dollars per half-hour visit. Services are not covered by insurance. The program typically consists of a one-hour initial visit followed by five-to-six half-hour visits each month thereafter for a total of cost of approximately \$320 per patient that completes the program. Our total funding request is for \$8,000, which we estimate would provide the full program to approximately 25 residents.



3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

According to the United States Surgeon General's reports on smoking and health:

(1) There is no safe level of exposure to tobacco smoke. Any exposure to tobacco smoke—even an occasional cigarette or exposure to secondhand smoke—is harmful. (2) Damage from tobacco smoke is immediate. Tobacco smoke contains more than 7,000 chemicals and chemical compounds that reach the lungs when inhaled. Blood then carries the poisons to all parts of the body. These poisons damage DNA, which can lead to cancer; damage blood vessels and cause clotting, which can cause heart attacks and strokes; and damage the lungs, which can cause asthma attacks, emphysema, and chronic bronchitis. (3) Smoking longer means more damage. Both the risk and the severity of many diseases caused by smoking are directly related to how long the smoker has smoked and the number of cigarettes smoked per day. (4) Cigarettes are designed for addiction. The design and contents of tobacco products make them more attractive and addictive than ever before. Nicotine addiction keeps people smoking even when they want to quit. (5) Even low levels of exposure, including exposure to secondhand tobacco smoke, are dangerous. An individual does not need to be a heavy smoker or a long-time smoker to get a smoking-related disease or have a heart attack or stroke triggered by smoke.

Smoking remains the leading preventable cause of death and disease in the United States. Recent studies show that smokers who talk with a clinician about how to quit dramatically increase their chances of quitting successfully

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

The Smoking Cessation Program at Cedars-Sinai is currently active and open to all who wish to participate. There is limited data to provide an estimate of how many patients are residents of Beverly Hills. Cedars-Sinai services the regional community. As such, we anticipate that a small percentage of program participants would be Beverly Hills residents.

If awarded Beverly Hills Community Assistance Grant Funds, this would be the initial year offering these services for free to Beverly Hills residents. We would evaluate program participation and use this information for any future CAGF requests.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

For the period between July 1, 2018 and June 30, 2019, we are requesting \$8,000. We are estimating an approximate cost of \$320 per patient that completes the program, which would be sufficient to provide the full program to approximately 25 residents. This funding would be available a first-come-first-serve basis to those who demonstrate proof of their Beverly Hills residency. This would be the first year requesting Beverly Hills Community Assistance Grant Funds for this program. We would evaluate program participation during this period and determine whether to reapply for future years.

6. What percentage of your annual funding would the City's contribution represent?

According to the 2015 Cedars-Sinai Medical Care Foundation 990 Form, the Foundation has approximately \$365 million in revenue from patient care and other sources. While this funding request represents only a small fraction of the total organizational funding, it would allow an added benefit to Beverly Hills residents.

7. What is the ratio of your organization's administrative operating costs?

0.042

This ratio represents the sum of management and general expenses and fundraising expenses divided by total expenses. Amounts are derived from Form 990 for the Fiscal Year ending June 30, 2016.

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

N/A

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

TAB<sup>3</sup><sub>9</sub>

## APPLICATION SUMMARY FY 2018/19

**Agency:** Chiron Center, Inc.

**Requested amount:** \$30,000 and in-kind

**History of City funding:** 2011/12: \$20,000; 2012/13: \$15,000 in-kind; 2013/14: \$20,000; 2014/15: \$22,000 and in-kind; 2015/16: \$30,000 and in-kind; 2016/7: \$ 30,000 and in-kind; 2017/18: \$30,000 and in-kind

**Agency description:** The Crisis Response Team (CRT) provides free, 24/7, 365, on-scene support, information and referrals to those affected by a trauma or serious loss during the initial hours after a critical incident.

**Proposed use of Community Assistance Grant Funds:** This funding request maintains the program at its current capacity. CRT provides on-scene support immediately after a crisis. Requests for service are generated by the BH Fire and Police Departments. The most typical requests for service are in response to fatal traffic collisions, completed suicide, homicide, death or serious injury of a child, workplace violence, and accidental or sudden death discovered by a family member, friend, or co-worker. The proposed use of in-kind donations include: a meeting and training space with technical support, a fee waiver on the Beverly Hills Police Department Livescan "rolling fee, and a fee waiver on the Livescan FBI background check for approximately 15-20 background checks per year.

**Target population/Primary service:** Crisis response to the Beverly Hills community and Beverly Hills Unified School District.

**Percentage of total program utilized by Beverly Hills residents/community:** Over 60% of requests for on-scene services are from the community of Beverly Hills.

**Quantifiable Services and Measures:** The CRT responds immediately to between 20-25 calls from the Beverly Hills Police and Fire departments per year with an average of 2-9 people served per call (school calls average 20-30+ community members served per day; CRT is typically on campus 3-5 days), providing hundreds of on-scene hours by CRT staff and volunteers each year. This includes an average of over 200 on-scene support hours at Beverly Hills schools annually, providing CRT services after serious accidents or deaths of students or school personnel.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

CRT provides the critical after-care needed to support impacted individuals for incidents requiring police and fire response. This service falls outside the scope of police and fire. Follow-up crisis intervention support by CRT volunteers is typically 1-3 sessions to help transition impacted individuals into additional or long-term support. CRT members with advanced training may also provide direct behavioral health information, support, and

resources to uniformed personnel, other emergency services professionals, and their families/loved ones.

**Percentage of annual funding City's contribution represents:** The \$30,000 year contribution from the City of Beverly Hills would represent approximately 9% of the \$340,000 annual budget. With the in-kind donation, the percentage of the award would increase in proportion to the value of the award give.

**Ratio of administrative to operating costs:** 14% Administrative: 86% operating.

**Service Profile:** Needs-based ☐ Quality of life-based ☐ Social Service ☒

Health ☐ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



**CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT APPLICATION  
FY 2018-2019**

**AGENCY/PROJECT NAME:**

Chiron Center, Inc.  
The Crisis Response Team  
([www.ChironCenter.org](http://www.ChironCenter.org))

**ADDRESS:**

9903 Santa Monica Boulevard  
Suite 383  
Beverly Hills, CA 90212

**CONTACT PERSON:**

Anne E. Kellogg

**PHONE:**

Cell: (310) 701-1140  
Work: (855) 343-6012, x700

**FAX:** N/A

**EMAIL:**

[Anne.Kellogg@ChironCenter.org](mailto:Anne.Kellogg@ChironCenter.org)

***Please type your answers to the following questions:***

- 1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
Please provide documentation.**

Chiron Center, Inc. is a registered non-profit in the state of California (EIN 26-3438852). Our 501(c)3 tax exempt number is: 26-3438852. Documentation is included.

**2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?**

**On/Near-Scene Response:** The Crisis Response Team (CRT) provides free, 24/7, 365, on-scene support, information, and referrals to those affected by a trauma or serious loss during the initial hours after a critical incident. **The CRT responds immediately to between 20 - 25 calls from the police and fire in the community of Beverly Hills per year with an average of 2 - 9 people served per call (school calls average 20 - 30+ community members served per day; CRT is typically on campus 3 - 5 days), providing hundreds of on-scene hours by CRT staff and volunteers each year.** The individuals served represent all ages, cultures, spiritual traditions, ethnicities, and backgrounds. Our average response time to arrive on-scene is 20 - 30 minutes and we usually remain at the scene for 2 - 4 hours. The most typical requests for service are in response to fatal traffic collisions, completed suicide, homicide, death or serious injury of a child, workplace violence, and accidental or sudden death discovered by a family member, friend, or co-worker.

**Follow-up Crisis Intervention Support:** CRT members may provide limited follow-up contact (typically 1 - 3 sessions) to help transition impacted individuals into additional or longer-term support.

**Direct Support to Emergency Services Personnel:** CRT members with advanced training may also provide direct behavioral health information, support, and resources to uniformed personnel, other emergency services professionals, and their families/loved ones. Historically, these services have been requested after a line-of-duty or off-duty death, a significant injury or loss to a Department member, a larger-scale, or high-profile incident.

**Organizational and Community Services Consultation:** Select members of the CRT consult with leadership within Emergency Services Departments, City Government, Educational Institutions, Community Organizations, Businesses and others regarding collaborative crisis response services.

**Crisis Response Team Training:** The CRT facilitates a 30 hour Crisis Response Team training, typically featuring speakers and experts on acute trauma and serious loss from local law enforcement and fire departments, the Coroner's Office, Survivors After Suicide, Compassionate Friends, Our House, the Rape Treatment Center, Sojourn, and other similar community-based resources. Subsequent in depth training is offered on an "invitation only basis," and is dedicated to more "hands on" training to those candidates specifically interested in joining the Team. This includes advanced education regarding the physiological affects of trauma, cultural differences related to grief and loss, specific training on the CRT's approach to on-scene crisis intervention, and opportunities for candidates to practice through role plays and other interactive exercises.

**Education and Outreach:** Specialized CRT members also provide presentations, trainings, interviews, and educational opportunities to area schools, businesses, emergency services



agencies, community organizations, media, and other entities regarding CRT services and acute, on-scene crisis support as requested.

### 3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

Those who experience trauma have a significantly higher probability of developing Post-Traumatic Stress Disorder (PTSD), (and other mental health-related issues), as well as drug and alcohol misuse/abuse as a result of the traumatic exposure. According to the PTSD Alliance:

- Persons experiencing a severe beating or physical assault are 4.5 times more likely to develop PTSD than the general population;
- Serious accident or injury survivors (e.g. traffic collision or auto vs. pedestrian) are 2.5 times more likely to develop PTSD;
- Shooting or stabbing survivors are over 2 times more likely;
- Similarly, those who experience the sudden or unexpected death of a family member, friend, or co-worker are also over 2 times more likely to develop PTSD.

The tangible and intangible costs to society for untreated PTSD are extremely high. According to national PTSD expert Mark Goulston, MD some of the basic costs to society as a result of PTSD include:

- Lost lives: Every year, society loses many of its best and brightest to the pain of untreated PTSD because the disorder significantly increases the risk of suicidal thoughts or behavior. The risk of suicide is especially high for people who develop both PTSD and depression, unless they receive effective treatment.
- High medical costs: People who don't get treatment for the fallout from trauma have higher rates of disability, more physical symptoms, more mental disorders, more medical diagnoses from doctors, and more risky health behaviors than other people. **The costs of untreated trauma-related alcohol and drug abuse alone are estimated to be \$160 billion per year in the U.S.**
- Legal woes: PTSD can impair judgment, self-esteem, the ability to plan for the future, and the ability to control anger, putting people at increased risk for impulsive or destructive behavior. Studies show that PTSD is a strong risk factor for both adult crime and juvenile delinquency and that it plays a powerful role in steering people into prostitution, drug dealing, and pathological gambling.
- Poor work performance and, in turn, lost jobs: PTSD can impair a person's concentration and productivity, create problems in getting along with co-workers, and trigger emotional outbursts on the job. All these factors, as well as the health problems associated with PTSD can make it hard for people with PTSD to get and keep jobs, resulting in higher-than-normal rates of unemployment. In addition, people with PTSD often have difficulty making upward career moves and frequently stay stuck in a low-salary rut because of their symptoms. **Experts estimate that the United States loses \$3 billion each year due to work problems caused by PTSD.**

- **Family troubles:** PTSD makes it hard to control emotions, empathize with other people, cope with financial matters, and handle the day-to-day pressures of relationships. It also ups the risk for substance abuse and other self-destructive behaviors. Because of this, the divorce rate for people with untreated PTSD is sky-high. In addition, children in families dealing with untreated PTSD have more learning and emotional problems than their peers. Rates of physical and verbal abuse are also high in families with a member suffering from PTSD.

Similarly, the U.S. government's National Technical Information Service states that untreated PTSD is "one of the most prevalent of all mental disorders, surpassed only by substance use disorders and depression as major public and mental health issues" – all of which are directly linked to exposure to trauma and serious loss.

**However, research also concludes that immediate, concrete, and direct information along with access to strong social support and incident-specific resources can significantly decrease this overall potential risk for PTSD, substance misuse, and other trauma-related impact.** The Crisis Response Team Program provides these critical, direct services in the immediate aftermath of the critical incident, creating the potential to significantly influence the overall health and wellbeing of survivors of trauma and serious loss, and the choices they will make during their process of recovery. Furthermore, CRT personnel serve as a referral resource for additional services and/or for the longer-term recovery options for those impacted by the traumatic events.

**The CRT also provides an invaluable link between those directly impacted by the events and the uniformed personnel responding to the scene.** Although CRT personnel always defer to the priorities of the responding emergency service personnel, we are able to assist with the practical and emotional needs of the community members. This complement of resources allows the uniformed personnel to focus on their primary tasks, knowing that CRT members will attend to other elements of the overall behavioral health and wellness of those impacted by the event. By bridging the divide between emergency services and community members, all those involved in the incident ultimately benefit from a more collaborative, comprehensive, and effective level of service and support.

**Having CRT personnel on-scene creates a significant direct cost savings to the communities served as well,** with an estimated minimum value of over \$60 - \$125 per hour in savings to the community. Emergency services personnel (with an average \$40/hour salary) are able to clear the scene significantly quicker, while still attending to the immediate needs of those affected by the emergency. Utilizing volunteer counselors (estimated at a minimum value of \$23.30 per hour) similarly reduces overall expenses while maintaining integrity of service. A less calculable, yet also important value-increasing factor is the peace of mind and positive "good will" generated between community members and the city's emergency services by providing these transitional safety-net services offered by The CRT.

**Crisis Response training, education and outreach similarly provides an invaluable cost saving and life-enhancing resource to the Beverly Hills Community.** Public presentations;

participation in community health and safety events; specialized education and outreach; and the annual CRT training provide free, “best practices” information to professionals and lay persons alike. Research confirms that access to pre-incident education, support, and resources has a significant positive effect on subsequent response after exposure to trauma. Regardless if the participants ever directly utilize CRT clinical services, their access to this pre-incident education and support will increase their knowledge related to common reactions, how to access resources, and practical strategies to support themselves, colleagues, and/or loved ones in times of loss and transition.

**4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?**

**Over 60% of the Crisis Response Team’s requests for on-scene services are from the community of Beverly Hills.**

We also maintain consistent and extensive contact with the Beverly Hills constituents including emergency services personnel; community and government leadership; local schools; the business community; and area residents through the following activities:

- Facilitate post-incident disposition and follow-up contact with emergency services personnel;
- Require mandatory ride alongs by all CRT participants (Police and Fire Departments);
- Regularly attend Emergency Services briefings and role calls;
- Provide training for emergency services and city personnel;
- Participate in “Every 15 minutes” and other school-based programs as requested;
- Attend and provide CRT representation at community safety & health fairs, and other local celebrations as requested;
- Provide informational presentations at meetings and community gatherings including: City Counsel, Beverly Hills School District, PTA and HS PTSA, Chamber of Commerce, Rotary, and like organizations as requested.

Additionally, the CRT specifically recruits, trains and utilizes Beverly Hills-based volunteers for our programs. This exceptional volunteer opportunity encourages a highly specialized and unique way for community members to “give back” to their family, friends, neighbors, schools, businesses and visitors to Beverly Hills, while serving along side our emergency response personnel. This collaboration exemplifies community-based partnership whereby the community truly serves their own during the most exceptional of circumstances.

**5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested?**

The funding amount request is **\$30,000 per year, plus requested in-kind donations** to include:

- A meeting and training space complete with technical support (audio & video/media equipment, a white board, tables, and chairs for training purposes) that can comfortably accommodate 30 – 40 people, and
- A fee waiver on the Beverly Hills Police Department Livescan “rolling fee” (\$32 per applicant), and a fee waiver on the Livescan FBI background check (\$19 per applicant) for approximately 15 - 20 background checks per year.

**Would you plan to reapply during future cycles?** Yes.

**6. What percentage of your annual funding would the City’s contribution represent?**

A \$30,000 yearly contribution from the city of Beverly Hills would represent approximately 9% of the total \$340,000.00 Chiron annual budget. If in-kind donations are granted, the percentage of the award would increase in proportion to the value of the award given.

**7. What is the ratio of your organization’s administrative:operating costs?**

Chiron Center Inc.’s 2016 overall cost ratio was: 14% Administrative costs, 86% Operating Costs.

**8. Financial Statement:**

- **For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.**

Please refer to the included document:

- Chiron Center’s 2016 990-EZ Tax Return

**9. Provide any additional information that may be useful in evaluating your request.**

Chiron’s Crisis Response Team services provide a unique service that directly addresses the unmet needs of the community during the most critical of circumstances. No other non-profit (or any other agency) provides the level of on-scene professional, immediate, effective, and trusted support that Chiron’s staff and counselors have earned and maintained since 1998.

Our unprecedented level of support from the Police and Fire Departments as well as the Beverly Hills High School has established our services as critical to meet regional obligations to help ameliorate social issues; and hundreds of hours per year of on-scene support offered by Chiron’s staff and counselors saves the community literally hundreds of thousands of dollars

each year. Furthermore, CRT services engender a deep sense of caring, respect, and appreciation by both recipients as well as uniformed personnel during the most difficult events that our community faces each year. Finally, the CRT Program also provides a unique opportunity for local volunteers to directly and significantly “give back” to their fellow community members and organizations.

This unique CRT Program has no equivalent resource or agency that provides similar types of comprehensive, acute, on-scene support service within our response areas. Numerous other quality agencies serve as referral resources for the CRT; they provide excellent follow-up and on-going treatment for survivors of trauma and serious loss, but they do not respond on-scene in the initial moments after the incident has occurred. Thus, the Crisis Response Team fills a unique gap in service related to the overall health and wellbeing of those impacted by trauma and serious loss, and remains as THE premier program for information, support, resources, and training related to acute, on-scene crisis response intervention.

Please visit our website, [www.ChironCenter.org](http://www.ChironCenter.org) for additional information.

Thank you for the opportunity to continue our partnership with our home community, Beverly Hills, and for considering our Community Assistant Grant application.

TAB  
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## APPLICATION SUMMARY FY 2018/19

**Agency:** Covia/Episcopal Senior Communities

**Requested amount:** \$45,000

**History of City funding:** First time applicant

**Agency description:** For the past 50 years, Episcopal Senior Communities (ESC) has operated with their mission to cultivate and build healthy communities with a continuum of residential and innovative aging services that actively promote intellectual, physical, social and spiritual well-being. To accomplish this, ESC owns and operates Life Plan and affordable senior housing communities throughout California. In addition, ESC provides an array of services to seniors living outside of the walls of their communities.

**Proposed use of Community Assistance Grant Funds:** ESC proposes using the grant to support ESC Community Services in Beverly Hills by provided the following services at no cost to residents:

ElderWISE: ESC's friendly visitor program, which provides meaningful individual connection to adults 60 and older, regardless of income. ElderWISE provides a weekly visit either in person or by phone, relying on a ranges of ages, including seniors as visitors. This program is offered to older adults living in their own home or as well as senior housing communities or retirement facilities. To ensure participant safety, all friendly visitor volunteers must pass an initial screening attend training and complete a federal Livescan background check.

Senior Center Without Walls (SCWW): An award winning program offering phone and online activities that help seniors build community, thus increasing social connection and alleviating loneliness. Through its virtual programs, SCWW offers education, conversation, lectures, classes and support groups that keep seniors intellectually active and vital across the country. This program serves seniors 60+, many whom are homebound. About 40% of the 1000 seniors registered for SCWW are low-vision or blind. To combat loneliness and to increase intellectual engagement seniors can registered for any of the 70+ weekly groups. In many cases, seniors registered for SCWW are calling in over ten times per week.

**Target population/Primary service:** Seniors (60+) living in the City of Beverly Hills

**Percentage of total program utilized by Beverly Hills community:** At this time, ESC is not providing services to Beverly Hills residents. With a Senior Resource Director dedicated to serving residents in Southern California, ESC will focus outreach and education efforts to reach the senior population in Beverly Hills by targeting senior housing communities (both affordable and market rate), skilled nursing facilities, senior centers, churches, synagogues and other senior service providers throughout Beverly Hills. In the first year, ESC anticipates enrolling at least 50 seniors in the SCWW and engaging 40 seniors in ElderWISE. Additionally, ESC expects to recruit and train at least 15 senior volunteers to participate and support either SSWW or ElderWISE.

**Quantifiable Services and Measures:** Will be able to quantify and measure impact based on community participation numbers.

**Current Performance:** N/A - New Applicant

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

This is Senior Episcopal Communitates' first application for CAGF support.

The risk of social isolation and loneliness has doubled in the US since the 1980s. Seniors who lack stimulation in their lives are much more prone to adverse physical and mental health, cognitive decline, increased risk of dementia, increased need for long-term care, and even vulnerability to elder abuse. ESC's programs are designed to create volunteers out of participants, engaging older adults and encouraging them to give back, fostering a stronger sense of purpose as well as community.

According to the 2010 census, over 6,000 seniors reside in Beverly Hills. Although SCWW and ElderWISE are open to all seniors living in the City, the benefits for isolated and/or homebound older adult are particularly beneficial. ESC will make an especially strong effort to reach those seniors to with participate or volunteer with their programs. With support from the City, ESC plans to partner with programs serving City residents including Meals on Wheels, the BH Shuttle, senior lunch programs and senior housing communities.

**Percentage of annual funding City's contribution represents:** 6%

**Ratio of administrative to operating costs:** For ESC's Community Services/Home and Community Based Services Division, 13% of all expenses are administrative.

**Service Profile:** Needs-based ☒ Quality of life-based ☒ Social Service ☐  
Health ☐ Education ☒ Cultural ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐





CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Episcopal Senior Communities/Friendly Visitor
ADDRESS:	2185 N. California Blvd., Suite 575 Walnut Creek, CA 94596
CONTACT PERSON:	Vanessa Sacks and Tracy Powell
PHONE:	323.928.2240; 510.593.0954
FAX:	323.872.5207
EMAIL:	vsacks@jtm-esc.org; tpowell@jtm-esc.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3 ☐ We are in a partnership with a 501c.3  
☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.
2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

Please see attached narrative

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

Please see attached narrative

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

please see attached narrative

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

please see attached narrative

6. What percentage of your annual funding would the City's contribution represent?

please see attached narrative

7. What is the ratio of your organization's administrative operating costs?

please see attached narrative

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

**CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019**

**AGENCY/PROJECT NAME:** Episcopal Senior Communities/Friendly Visitor  
**ADDRESS:** 2185 N. California Blvd., Suite 575  
Walnut Creek, CA 94596  
**SOUTHERN CA OFFICE:** Senior Resources/Los Angeles  
2916 St. George Street, Suite 106  
Los Angeles, CA 90027  
**CONTACT PERSON:** Vanessa Sacks  
**PHONE:** 323-928-2240  
**FAX:** 323-872-5207  
**E-MAIL:** vsacks@jtm-esc.org

**Please type your answers to the following questions:**

**Is your organization a 501c.3 or are you in partnership with a 501c.3 organization:**

Episcopal Senior Communities is a 501c.3. Documentation showing our 501c.3 status is attached.

**What services do you propose to provide the Beverly Hills community that local government is not currently providing?**

For the last 50 years, Episcopal Senior Communities (ESC) has honored its mission to cultivate and build healthy communities with a continuum of residential and innovative aging services that actively promote intellectual, physical, social, and spiritual well-being. To accomplish this, ESC owns and operates both Life Plan and affordable senior housing communities throughout California (please visit ESC's website at [www.jtm-esc.org](http://www.jtm-esc.org) for more information about our organization). In addition, ESC provides an array of services to seniors living outside the walls of our communities, and sees opportunity to serve older adults residing in Beverly Hills with two Community Service programs: ElderWISE and Senior Center Without Walls (SCWW).

With an overarching goal of increasing social connection amongst seniors aging in place, ElderWISE and SCWW have the ability to reach seniors in their homes and provide socialization, connection, and intellectual stimulation through unique programming. Researchers at Brigham Young University have found that feeling lonely is as dangerous to one's health as smoking 15 cigarettes a day. In fact, loneliness and social isolation are correlated with health issues such as impaired mental performance, weakening of the immune system, and increased risk of vascular, inflammatory, and heart diseases, as well as mortality.

This year, in collaboration with Dr. Carla Perissinotto, Associate Chief for Geriatrics Clinical Programs at UCSF, ElderWISE and SCWW will measure increased social connection by administering the UCLA loneliness scale to new participants. This scale will be administered to

participants at the point of registration, and will be tracked regularly to gauge the successful outcomes of engaging in interactive and stimulating programming. This data will inform us as to the real physical and emotional health benefits of participating in ESC Community Services' programs from the comfort of home, and how we can better serve a wider audience of adults in need of connection and stimulation. In addition, satisfaction is tracked on an annual basis, giving us important information and feedback about the efficacy of our programs. This feedback is actively used to improve services to best meet the needs of our participants and volunteers.

A grant from the City of Beverly Hills will be used to support ESC Community Services in Beverly Hills by providing the following services at no-cost to participants:

#### ElderWISE

As we age, we face many transitions - loss of spouse, friends, nearby family, mobility, and transportation access, which affect our ability to join social services, community events, and find support. This often leads to loneliness, a lack of connection with the outside world or the activities that once gave us fulfillment, and a loss of sense of community.

ElderWISE, ESC's friendly visitor program, provides meaningful individual connection to adults age 60 and older, regardless of income. Initially started in the Bay Area in 2009, ElderWISE now serves five counties in California, including Los Angeles. Many program participants live alone in their homes, while some may live with a partner, family member or housemate, yet still feel a need for connection. ElderWISE is a unique friendly visiting program by virtue of providing a weekly visit either in person or by phone, relying on a ranges of ages—including seniors—as visitors. Additionally, the visiting program is offered to older adults living in their own home as well as in senior housing communities or retirement facilities, because research shows that many people may feel lonely even when living with others. Trained volunteers make weekly visits to share stories, actively listen and engage. Participants and volunteers may spend their time looking at old family albums or movies, working on art projects, reading together, enjoying tea or coffee, or chatting about current and past events with the ultimate goal of building a strong and unique friendship. ElderWISE volunteers are present and connect emotionally with their matches, empathize with loss and suffering, and appreciate their new friend's unique gifts and contributions to society. It's a mutually enriching relationship, as the match and the volunteer have the opportunity to remain engaged and receive consistent emotional support.

While our volunteers are adults aged 18 and over, many are actually seniors themselves, ensuring a strong empathetic connection with ElderWISE participants. To ensure participant safety, all friendly visiting volunteers must pass an initial screening, attend training, and complete a federal Livescan background check, paid for by the program. ElderWISE volunteers can assist with identifying social services in the community as well. Maintaining personal health and safety are additional perks of friendly visits, as volunteers note warning signs such as lack of food, frequent falls, elder abuse, or other red flags. ElderWISE staff provide ongoing support to both program participants and volunteers. Volunteers commit to at least six months of in -person or telephone visits,

promoting consistency and stability. It is becoming increasingly clear to organizations working to alleviate social isolation, that through common interests and experience you can establish a relationship that will broaden and deepen the senior's life. The ElderWISE Friendly Visiting Program does just that, connects and engages individuals with each other in an enriching way.

Silvia, an 88-year-old participant writes of her friendly visitor, "Celeste is an angel. She has made me feel more secure because I know she cares about me."

Another senior participant who lives in an affordable housing community shares, "I love this program—it works perfectly. The volunteer plays an important role in my life. She helps me with my daily life chores such as translating my letters and helping me make a call. I know she really cares about me, and this makes me feel happy and grateful. The ElderWISE program is essential for our senior residents like me in La Pintoresca Community—it definitely helps make our lives better!"

### Senior Center Without Walls

SCWW is an award-winning program offering phone and online activities that help seniors build community, thus increasing social connection and alleviating loneliness. Through its virtual programs, SCWW offers education, conversation, lectures, classes, and support groups that keep seniors intellectually active and vital in 34 states across the country. This innovative model provides a way for seniors to meet new friends and stay connected while also engaging in intellectual stimulation essential for good cognitive health and maintenance of mental acuity. SCWW's current offerings can be found here: <https://www.seniorcenterwithoutwalls.org/wp-content/uploads/sites/31/2017/12/Winter-2018-Catalog.pdf>

SCWW primarily serves seniors aged 60+, many of whom are homebound. About 40% of the more than 1,000 seniors registered with the program are low-vision or blind, making services such as SCWW more important than ever. To combat loneliness and increase intellectual engagement, seniors can register for any of the 70+ weekly groups offered in a broad range of categories. While traditional friendly visitor programs are offered only once a week for one hour, SCWW provides opportunities to engage with others across the country every single day: in many cases, participants are calling in over ten times a week. A portion of participants even call in 5-6 times a day. For times when loneliness might spike, such as holidays, SCWW provides important support.

After a senior joins the program, they receive SCWW's current catalogue of offerings, with new catalogues each quarter. To participate in a class, members dial a conference call number and enter a code. Calls are led by trained volunteer facilitators, most of whom are older adults and participants themselves. This allows SCWW to utilize the wealth of knowledge and engage the skills of its own community, connecting members on a deeper level. Many facilitators have said in surveys that this volunteer activity brings a sense of purpose to their lives. Other facilitators include expert staff from partner organizations whose own communities participate in SCWW. For example, the Low-

Vision Support Group is led by Lighthouse for the Blind, LGBTQ Chat by Openhouse of San Francisco and the Museums at Home by Docents at esteemed Museums throughout the country.

Mark, a 71-year-old participant from Sacramento shared, “Words can’t express how much I have benefited, and continue to enjoy participating in a variety of the SCWW groups. I have grown so much, experienced profound healing, and become very fond of the folks that I meet with every week. Thank you with all my heart! I’ll see you on the telephone!”

A major benefit for our seniors seeking reprieve from isolation is the pairing of ElderWISE with our robust telephone program, Senior Center Without Walls. Participants are able to avail themselves of increased conversation and choose from myriad offerings that keep them engaged in between ElderWISE visits; some seniors even find they enjoy sharing a SCWW call with their ElderWISE volunteer. By offering these two programs, ESC seeks to include each senior in a caring community, increase their sense of wellbeing, and ensure they feel valued and important.

In southern California, ElderWISE currently partners with Menorah Housing, ESC’s own Resident Services Coordinators in ten senior housing sites, WISE and Healthy Aging, the LA LGBT Center, West Hollywood Community Housing Corporation, St. Barnabas Senior Services, Neilson Villa, Action on Aging, the LA DOVIA group, the Motion Picture Television and Film Association, and the Pasadena Care Center. Another unique feature of ESC’s Community Services programs include a “wrap around” service: our Director of Senior Resources will follow up with all seniors enrolled in the program to ensure they are also aware of other resources in the greater community, and to offer our Emergency Funds program if appropriate. We can also work with the City of Beverly Hills to determine if a Senior Produce Market (which offers fresh fruits and vegetables at wholesale prices) would be a resource to supplement access to nutrition for its seniors.

**Why are these services considered critical (e.g., enhance quality of life, improve public safety)?**

The risk of social isolation and loneliness has doubled in the US since the 1980s. Seniors who lack stimulation in their lives are much more prone to adverse physical and mental health, cognitive decline, increased risk of dementia, increased need for long-term care, and even increased vulnerability to elder abuse. ESC's programs are designed to create volunteers out of participants, engaging elders and encouraging them to give back, fostering a stronger sense of purpose as well as community.

ElderWISE and SCWW aim to decrease social isolation and loneliness, both of which are correlated with major health risks for seniors. Dr. Perisinnotto from UCSF states, “the profound effects of loneliness on health and independence are a critical public health problem.” According to McMaster University, “having more supportive social relationships was indeed



related to a decreased mortality risk. Based on the strength of the findings... [the] lack of social relationships is as strong a risk factor for mortality as are smoking, obesity, or lack of physical activity. Similarly, older adults who are lonely have an increased risk of dying sooner and are more likely to experience a decline in their mobility, compared to those who are not lonely.”

Seniors are also at an increased risk of cognitive decline and dementia. The scientific community has long sought effective strategies to optimize cognitive function of older adults, preventing or slowing these age-related illnesses and challenges. According to an article in *Aging Health*, as cited by the National Institute of Health (NIH), “Engagement in activities stimulate cognitive functioning, be it through leisure or structured training tasks, is emerging as one of the most promising approaches to promote cognitive health with aging...healthy and cognitively impaired older adults are likely to benefit from engaging in activities that ‘exercise the brain’.”

According to the 2010 census, over 6,000 seniors reside in Beverly Hills. Although ElderWISE and SCWW are open to all of the city's older adults, the benefits for seniors who are homebound and isolated are particularly profound in terms of social connections and potential health benefits. Roughly 12% of Beverly Hills older adults (65+) live alone and, through partnerships with other organizations, ESC makes an especially strong effort to reach these seniors to either participate or volunteer with ESC programs. With support from the City of Beverly Hills, ESC will increase activity to reach seniors living in Beverly Hills through partnerships with local organizations including: Meals on Wheels, senior lunch programs, the Senior Shuttle Service, Villages, senior and community centers, and senior housing communities.

Isolation and loneliness know no bounds; they can be experienced by all. EW and SCWW make programs available to all older adults regardless of race, ethnicity, sex, religion, national origin, sexual orientation, gender identity, ancestry, military discharge status, marital status, source or level of income, housing status, or any other protected classification.

By 2030, the senior population (65+) in California is expected to grow by four million, which creates an unprecedented risk of declining health due to isolation, loneliness and/or cognitive impairment. ESC seeks to disrupt the patterns of loneliness and isolation by providing a mechanism for social engagement, intellectual stimulation, education, and support. ESC programs help older adults to increase physical, emotional, and mental health while aging in place, at home.

**What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?**

Episcopal Senior Communities and its two programs, ElderWISE and Senior Center Without Walls, are not currently providing services to Beverly Hills residents. With a Senior Resource Director dedicated to serving residents in southern California, we will focus outreach and education efforts to reach the Beverly Hills senior population by targeting the following venues: senior housing communities (affordable and market rate), skilled nursing facilities, the senior centers, hospitals, churches, synagogues and other senior service providers throughout Beverly

Hills. Outreach presentations will be made in person or virtually depending on the specific needs of each community. In the first year, we anticipate enrolling at least 50 seniors in Senior Center Without Walls, and engaging 40 seniors in ElderWISE. Additionally we expect to recruit and train at least 15 senior volunteers to participate and support either SCWW or ElderWISE.

**The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?**

Episcopal Senior Communities requests funding in the amount of \$45,000. After the initial pilot year, we would expect to reapply for funding, but believe we would be able to build on this first year and increase participation in year two as well as rely on some local fundraising efforts with individual, families, and local business.

**What percentage of your annual funding would the City's contribution represent?**

Senior Center Without Walls's budget:	\$401,264
ElderWISE's budget:	295,590
Total:	\$696,854

(see attached Income Statement for Home and Community Based Services)

Beverly Hill's contribution of \$45,000 is 6% of the annual funding of these two Community Services programs.

**What is the ratio of your organization's administrative operating costs?**

For ESC's Community Services/Home and Community Based Services division, 13% of all expenses are administrative.

**Financial Statement:**

For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.

For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

**Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.**

**Submission of the following documents is required:**

Completed CAGF application

Documentation of 501c.3 status or proof of 501c.3 status through partnership.

Copy of most recent Form 990 – Return of Organization Exempt from Income Tax

Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills

Please note that insurance requirements have changed for FY 2018-19. Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)

The City must be named as additionally insured under each policy

Subrogation must be waived for each insurance policy

An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City.

TAB 11

## APPLICATION SUMMARY FY 2018/19

**Agency:** ETTA

**Requested amount:** \$25,000

**History of City funding:** 2017-18: \$10,000

**Agency description:** ETTA's mission is to provide programs and services that enable people with disabilities, and the families who love them, to live fully enriched, independent and active lives; our vision is an inclusive, participatory community of people with and without special needs, succeeding and growing together. ETTA offers a full spectrum of services for adults with intellectual and developmental disabilities, including residential housing, case management, employment training and placement, educational services and social services – all to support their clients to achieve greater independence, autonomy and inclusion.

**Proposed use of Community Assistance Grant Funds:** Grant funds would be used for the Transitions program. The program helps individuals with special needs and their families determine and access the right combination of public and/or private programs to achieve a healthy and fulfilling transition to adulthood. This is achieved through a combination of education, support, coaching, and guidance. The program provides training workshops to introduce and educate individuals and families to the issues involved. The program provides direct services to families, and provides consultations to families regarding their service needs.

In FY 2018-19, ETTA plans continue and expand their work with Transitions Program, and increase their reach by holding workshops in Beverly Hills (and conducting marketing and outreach for the workshops), and encouraging residents to follow up with them for consultation and direct services. This follow-up is the critical element given the financial stress experienced by many families with special needs.

**Target population/Primary service:** Individuals with intellectual and developmental disabilities below the age of 25, and their families.

**Percentage of total program utilized by Beverly Hills residents/community:** Currently, ETTA services approximately 125 clients – 20 of whom (15%) are Beverly Hills residents. Approximately 50% of their clients live within a three mile radius of Beverly Hills.

**Quantifiable Services and Measures:** In the first five months of the 2017-18 funding cycle, intensive personal services were provided to 14 families in Beverly Hills or adjacent communities through the Transitions Program. An aggregate of 275 hours were spent providing services to these families at no cost to them. Among the outcomes achieved, was to connect six of these families to their entitled services. By examining the range of services provided by the Regional Center, and by those qualifying for Social Security Disability income, ETTA estimates that the six clients will be receiving, on average, over \$50,000 annually for as long as their disability needs continue (which in the case for each of these clients, would be funding for the span of their lifetime).

**Historical Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

In 2012, the Center for Disease Control (CDC) estimated that annual medical expenditures per child with Autism Spectrum Disorder range from \$2,100 to \$11,000, and that intense behavioral interventions can cost from \$40,000 to \$60,000 per year. Many families cannot afford to purchase additional services beyond direct care.

The number of Department of Development Services (DDS) consumers in California has increased by 57% since 2000, while the general population has only grown by 14%. Autism is the fastest growing of the developmental disabilities; incidences have increased by 1,148% since 2003, and during the same period, incidences of mental retardation increased by 24%, epilepsy by 21% and cerebral palsy by 19%. It is estimated that 30-35% of individuals with developmental disabilities have a dual diagnosis, increasing the level of their needs.

Within the Iranian community, ETTA has been a champion for inclusion, support and programming, and strives to change deeply entrenched community attitudes that stigmatize disabilities. ETTA has a large Iranian-American Division with the capacity to teach and converse in Farsi.

**Percentage of annual funding City's contribution represents:** .4% annual budget of \$6.3 million.

**Ratio of administrative to operating costs:** 14.7% are administrative.

**Service Profile:** Needs-based ☐ Quality of life-based ☐ Social Service ☒

Health ☐ Education ☒ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	ETTA/Transitions Program
ADDRESS:	1427 S. Robertson Boulevard: Los Angeles, CA
CONTACT PERSON:	Dr. Michael Held
PHONE:	310-422-9883
FAX:	424-249-3361
EMAIL:	michael@etta.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3 ☐ We are in a partnership with a 501c.3  
☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

ETTA's mission is to provide programs and services that enable people with disabilities, and the families who love them, to live fully enriched, independent and active lives; our vision is an inclusive, participatory community of people with and without special needs, succeeding and growing together. Founded in 1993 to serve the greater Los Angeles area, ETTA has consistently expanded opportunities: today we offer a full spectrum of services for adults with intellectual and developmental disabilities, including residential housing, case management, employment training and placement, educational services, and social services - all to support our clients to achieve greater independence, autonomy and inclusion. While we have a special expertise serving Jewish clients, we serve all who come to us without discrimination.

Last year, the City of Beverly Hills awarded us a Community Assistance Grant to support our Transitions program; this important service helps individuals with special needs and their families determine and access the right combination of public and/or private programs to achieve a healthy and fulfilling transition to adulthood. Your funding helped us provide intensive personal services during the first 5 months of the grant cycle to 14 families who are residents of Beverly Hills or adjacent communities. Between August 1 and November 30, we spent an aggregate of 275 hours with these families (an average of 19.5 hours each) - all at no cost to them. Among the outcomes achieved, was to connect 6 of these families to their entitled services. By examining the range of services provided by the Regional Center and by those qualifying for Social Security Disability income, we can estimate that these 6 clients will be receiving, on average, over \$50,000 annually for as long as their disability needs continue, which, in the case of these six clients (and most of the I/DD population) is for the span of their lifetime. So, the leverage of City of Beverly Hills dollars is considerable -- ETTA's casework and advocacy support is enabling clients to gain a lifetime of entitled services.

We want to continue and expand this work to serve still more members of the extended Beverly Hills community. Your grant will again support intensive services - as well as added outreach: we plan to offer training workshops to introduce the process more widely and educate families about the issues involved. Workshops will cover Individual Transition Plans and Person-Centered Planning; an overview of the legal matters to be considered (power of attorney, conservatorship, representative payee..); the benefits and complications of Social Security and the Regional Center system; an explanation of healthcare options, living arrangements and options; the School Transition Process and continued education; community integration and how to build a meaningful life; and a listing of generic resources available in the community.

In all, we ask for your help in providing services that will optimize the transition to adulthood for your local residents, and help them find meaningful programs, services, housing, jobs and supports.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

The services not only address critical health and welfare issues for community members – they are transformative, enhancing not only clients' immediate quality of life but also their entire life trajectory. Meanwhile, no one else is offering them.

The proper services will determine whether individuals with intellectual and developmental disabilities (I/DD) can live independently, find paid employment (or meaningful volunteer work), integrate into their communities – and so much more – but too many families are unaware of their very existence. For one, many people want to transition to independent living - but have no idea how to go about this, or even that supportive services are available to make their desires a reality. Similarly, too many families are misinformed about the options and benefits which are available and consequently make mistakes along the way that require a great deal of effort to unwind. An example of this: families often fail to follow the prescribed "order" of solutions and establish bank accounts for their children before SSI benefits are determined; they therefore find themselves denied benefits despite a clear and compelling need (and are forced to spend down the funds in the account rather than using them as originally intended).

And then there is the emotional component, which cannot be overlooked. As one parent put it, "...if I had someone by my side, walking through this with me who understood all of the components that needed to be put into place and what order they needed to be done - as well as reassuring me that I was making the best decisions -- it would have been a completely different experience for me."

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

Currently, ETTA serves approximately 125 full-time clients – 20 of whom (15%) are Beverly Hills. In addition, we provide information and referral to another 200 callers annually, residents. Our work is convenient to the area: while our administrative office is located in North Hollywood, our main Day Program is less than two blocks away from the Beverly Hills border; as a result, approximately 50% of our clients live within a 3-mile radius of the Beverly Hills city limits. Too, we note that both the Chairman and President of our Board of Directors are Beverly Hills residents.

This program currently serves a comparable percentage of Beverly Hills residents – but of course, your funding – which would be dedicated to members of the Beverly Hills community – would ensure that this proportion would dramatically increase.

While our goal would be to deliver to Beverly Hills service numbers comparable to those we achieved last year, we believe we would exceed those expectations. To ensure this, we would look to partner with key Beverly Hills institutions, institutions with whom we have worked in the past and whose contributions are central to the City: the Special Education Division of Beverly Hills High School; the Beverly Hills Library (as a seminar/workshop location); the Maple Center (part of the City's Social Services Safety Net); and of course local synagogues like Nessah, Chabad, Beth Jacob and Young Israel of Beverly Hills (we say "local synagogues" but they are far more than that - Nessah is the largest Persian-Jewish congregation in the United States; its landmark building also houses an important educational and cultural center. Beth Jacob is the largest Orthodox synagogue in the Western United States. The others also are important Beverly Hills institutions).



5. The funding year is July 1, 2017 to June 30, 2018. What is the funding amount requested? Would you plan to reapply during future cycles?

We respectfully request a grant of \$25,000. Last year, we made excellent use of the first half of your \$10,000 grant to provide 275 hours of intensive services to 14 local families in the first five months of the grant cycle (which would have cost them almost \$30,000). This year we would again focus on providing those services – and also on increasing our reach by holding workshops in Beverly Hills (and conducting the outreach and marketing for those workshops) and encouraging residents to follow up with us for consultation and services. It will make such a difference that we will be able to assure them that these transformative services will not cost them anything: most families with children who have special needs experience terrible financial stress. In 2012, the Centers for Disease Control estimated that annual medical expenditures per child with Autism Spectrum Disorder range from \$2,100 to \$11,000 - and that intense behavioral interventions can cost from \$40,000-\$60,000 per year; these expenses increase for adults (because of housing, job support, day programs etc.) – and all of these figures are higher in a high-cost area like Los Angeles. Many families simply cannot afford to purchase additional services beyond direct care.

While each year will of course be judged on a standalone basis, we would expect to reapply in future cycles – both because no one else is providing these services and because the need is rising. In the 1990s, the special needs community faced the alarming news that more and more children were being identified as having developmental disabilities, and the trend is steadily worsening. The number of Department of Developmental Services (DDS) consumers in California has increased by 57% since 2000, while the general population has grown only by 14%. Autism is the fastest-growing of the developmental disabilities; incidences have increased by 1,148% since 2003 (during that same period, mental retardation increased by 34%, epilepsy by 21%, and cerebral palsy by 19%). Even more challenging, it is estimated that 30-35% of individuals with developmental disabilities have a dual diagnosis (a co-occurring mental health issue), increasing the level of their needs. Organizations rose to meet the challenge of this explosive trend with early interventions, diagnostic evaluations, adjunct school services, social skills training and a host of other services – but today this tsunami of children are aging-out of school-aged programs, entailing a new set of challenges as new systems need to be put into place. This program will continue to increase in importance.

6. What percentage of your annual funding would the City's contribution represent?

ETTA's annual budget is \$6.3 million and growing. We are experts at leveraging public and private funding to ensure we can provide our important services.

The City's contribution would represent a small percentage of our overall annual funding - but an important piece of the funding of this program. Your commitment and the trust it represents will help us secure other philanthropical support, and we are prepared to devote our own organizational funds to ensure that the value we deliver far exceeds the amount of your grant.

7. What is the ratio of your organization's administrative operating costs?

Of our annual \$6.3 million budget, \$4.989 million (79%) is spent directly on program costs. Administrative costs represent approximately 14.7% of our budget, and fundraising costs account for the remaining 6.4%.

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal.  
Cultural applicants, please describe your program here.

ETTA is the only organization in Los Angeles that can truly meet the needs of Beverly Hills' thriving Iranian-American population: we have been a pioneering champion for inclusion, support and programming for this group, working to change deeply entrenched community attitudes that stigmatized disabilities. Today we have a large and unique Iranian-American Division with the capacity to teach and converse in Farsi and enjoy tremendous support from this important community.

ETTA is also an organization that allows clients to rise to their own abilities. One of our Group Home residents had been in a non-ETTA day program for years, placed in an old-style vocational workshop where he spent his time stuffing envelopes. When that program closed, he came to us – but did not want to be in a Day Program: he wanted to find paid employment. Our JOBS Program placed him in a volunteer position at a synagogue to help him build his skills (including soft skills like showing up on time and being socially appropriate). He was recently hired by the Veterans Administration to act as a greeter – and he has never been happier. He loves what he does and is proud to be earning money. We are all thrilled at the personal transformation he has seen.

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☒ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

TAB  
12

## APPLICATION SUMMARY FY 2018/19

**Agency:** Housing Rights Center

**Requested amount:** \$55,000

**History of City funding:** First time applicant

**Agency description:** The Housing Rights Center (HRC) was created in 1986 to lead the fight for equal access in housing in Los Angeles County. HRC's mission is to actively support and promote fair housing through education, advocacy and litigation, to the end that all persons have the opportunity to secure the housing they desire and can afford, without discrimination based on their race, color, religion, gender, sexual orientation, gender identity, gender expression, national origin, familial status, marital status, disability, genetic information ancestry, age, source of income or other characteristic protected by law.

**Proposed use of Community Assistance Grant Funds:** The HRC proposes to do the following with the CAGF funds: HRC will staff weekly clinics in Beverly Hills providing landlord tenant and fair housing services, and will make appointments with residents in the City who are not able to attend a clinic. HRC reports that they are also uniquely capable of investigating and mediating complaints involving housing discrimination and reasonable accommodations and modification requests. HRC's multilingual staff will provide discrimination complaint investigation, landlord tenant counseling, education and outreach, and fair housing legal services. Through their Fair Housing Program, HRC will seek to address complaints of housing discrimination, prevent homelessness by keeping tenants in their housing and will prevent future incidents of housing discrimination from occurring by enforcing fair housing laws. HRC will provide landlords, real estate brokers and lenders education about their responsibilities to tenants and home seekers. Finally, HRC will provide the City with the outcome of 15 random audits to be conducted in the City for discrimination against the elderly, families with children, persons with disabilities and other protected classes.

**Target population/Primary service:** Tenants and landlords in Beverly Hills.

**Percentage of total program utilized by Beverly Hills residents/community:** Of the total number of LA County residents HRC served in 2017, 2,752 households, HRC provided landlord-tenant services to 50 Beverly Hills residents (1.82%), almost all of whom happened to be moderate to extremely low income. If selected, HRC anticipates that serving approximately 200 Beverly Hills residents in the first year (7.28%).

**Quantifiable Services and Measures:** Will be able to quantify and measure impact based on enrollments and community participation numbers.

**Current Performance:** N/A

**General Comment(s)** *(e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):*

This is Housing Rights Center's first application for CAGF support.

Although HRC offers mediation services, the City already contracts with another provider for mediation.

Under a current \$200,000 annual grant from the County of Los Angeles, the HRC provides general tenant/landlord information to approximately one third of LA County's 10 million residents, including the residents of Beverly Hills. However, the current LA County grant does not cover workshops, clinics and more personalized services to the City's residents on a regular basis. Twenty four cities in LA and Ventura counties contract with the HRC to provide tenant landlord and fair housing services to their residents.

**Percentage of annual funding City's contribution represents:** Of the \$55,000, HRC will charge about 10% in administrative operating costs. HRC reports that their actual amount is 14%, but that they will leverage their resources and use other funding to subsidize that cost.

**Ratio of administrative to operating costs:** 4% are administrative.

**Service Profile:** Needs-based ☒ Quality of life-based ☐ Social Service ☒

Health ☐ Education ☒ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Housing Rights Center/Landlord-tenant and Fair Housing Services
ADDRESS:	3255 Wilshire Blvd., Suite 1150, Los Angeles, CA 90010
CONTACT PERSON:	Laurel Steven
PHONE:	(213) 387-8400, ext. 1112
FAX:	(213) 381-8555
EMAIL:	lsteven@housingrightscenter.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3                      ☐ We are in a partnership with a 501c.3  
  
☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.
2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

The Housing Rights Center (HRC) was created in 1968 to lead the fight for equal access in housing in Los Angeles County. Beverly Hills refers residents to HRC on its website: (<http://www.beverlyhills.org/citygovernment/departments/communityservices/humanservicesdivision/housingrights/>) but it does not fund HRC for these services. Under this proposal, HRC will staff weekly clinics in Beverly Hills providing landlord-tenant and fair housing services. HRC will make appointments with city residents who cannot attend a clinic. As the nation's largest and one of its oldest fair housing councils, HRC is also uniquely capable of investigating and mediating complaints involving housing discrimination and reasonable accommodations and modifications requests. HRC has a multilingual staff who will provide (1) Discrimination Complaint Investigation, (2) Landlord/Tenant Counseling, (3) Education and Outreach, and (4) Fair Housing Legal Services. Through our Fair Housing Program, HRC seeks to address complaints of housing discrimination, prevent homelessness by keeping tenants in their housing and prevent future incidents of housing discrimination from occurring by enforcing fair housing laws. Any Beverly Hills resident can also come to our mid-city LA office Monday through Friday from 8:30am to 5:00pm or call our toll-free 800 number, or our TTY number for the hearing impaired. In addition, HRC will provide workshops for landlords, real estate brokers and lenders to educate them about their responsibilities to tenants and home seekers. Finally, under this program, HRC will provide the City with the outcome of 15 random audits to be conducted in the City for discrimination against the elderly, families with children, persons with disabilities and other protected classes.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

Even with a rent stabilization ordinance, many of Beverly Hills' residents who are elderly, families with children and disabled face a possibility of homelessness and displacement everyday. Although significant strides have been made in addressing issues of discrimination, HRC's work has shown that, unfortunately, discrimination in housing continues. In order to address these problems, the Housing Rights Center proposes to provide a comprehensive fair housing and landlord/tenant counseling services program. Through our Program, HRC seeks to provide landlord-tenant information and address complaints of housing discrimination and prevent future incidents of housing discrimination from occurring. HRC is uniquely suited to accomplish the Fair Housing Program as our mission is to actively support and promote fair housing through education and advocacy to the end that all persons have the opportunity to secure the housing they desire and can afford, without discrimination based on their race, color, religion, gender, sexual orientation, national origin, familial status, marital status, disability, ancestry, age, source of income or other characteristics protected by law. Under a current contract with LA County, HRC is offered to provide general landlord/tenant information to approximately a third of LA County's 10 million residents including the residents of the City of Beverly Hills. The \$200,000 annual grant to provide these services, however, does not allow HRC to conduct workshops or clinics or more personalized services on a regular basis for the city's residents. For this reason, 24 cities in LA and Ventura counties contract with HRC directly to provide enhanced landlord-tenant and fair housing services for their residents. HRC proposes to provide a specialized program for the city's residents including its landlords and tenants.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

Of the total number of LA County residents HRC served in 2017, 2,752 households, HRC provided landlord-tenant services to 50 Beverly Hills residents (1.82%) Almost all of whom happened to be moderate to extremely low income. If HRC is selected for this program, it anticipates serving an anticipated 200 Beverly Hills residents in the first year (7.28%). The number will undoubtedly increase with HRC's planned media campaign targeted to Beverly Hills residents.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

The funding request is \$55,000 for the fiscal year. HRC plans to apply for other funding cycles as well.

6. What percentage of your annual funding would the City's contribution represent?

HRC's annual funding amount is \$1.9 million. HRC's request of \$55,000 would represent 2.89% of its annual funding.

7. What is the ratio of your organization's administrative operating costs?

Of the \$55,000 requested, HRC will charge about 10% in administrative operating costs. The actual amount is about 14% but HRC will leverage its resources and use other funding to subsidize this cost.

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.



9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

The Housing Rights Center's proposed program will provide telephone and in-person counseling to both tenants and landlords regarding their respective rights and responsibilities under California law and Beverly Hills city ordinances. In addition to answering basic housing questions, Counselors will advise clients on how to resolve their housing problems or issues. For example, staff members commonly cite specific civil codes that pertain to the client's matter and/or provide sample letters that discuss a particular issue. HRC staff will draft letters, reasonable accommodations requests and repair requests letters for city residents. HRC staff will also provide mediation services to resolve landlord-tenant disputes. Tenant/landlord counseling not only facilitates housing-rights education of residents, but also serves to empower them in their efforts to achieve fair housing for themselves and in their communities.

Under the proposed program, the Housing Rights Center will provide training on landlord-tenant, fair housing and related government laws to Beverly Hills city staff and its partner agencies.

HRC maintains a detailed database, and will provide the city with regular reporting of the services provided.

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

TAB 13

## APPLICATION SUMMARY FY 2018/19

**Agency:** Jewish Family Service (JFS)

**Requested amount:** \$275,000

**History of City funding:** (City-funding of JFS began in 1994. CAGF was established in 2005) 2005: \$5,000; 2006: \$46,360; 2008/9: \$50,500; 2009/10: \$50,500; 2010/11: \$56,000; 2011/12: \$86,000; 2012/13: \$80,000; 2013/14: \$120,000; 2014/15: \$180,000; 2015/16: \$225,000; 2016/17: \$250,000; 2017/18: \$250,000

**Agency description:** Founded in 1854, JFS has a long history of providing services on a non-sectarian basis to families and individuals in need. JFS is a leader in the provision of a continuum of care for older adults throughout Los Angeles County.

**Proposed use of Community Assistance Grant Funds:** Support older adult residing in Beverly Hills to maintain their independent living in the community by continuing the existing Beverly Hills Care Management Program. Due to their new outreach efforts, intakes and referrals have doubled in the past year and are expected to increase. The additional funding is being requested to respond to the needs of all residents of Beverly Hills who can benefit from services.

**Target population/Primary service:** A continuum of supportive services for Beverly Hills older adults who are frail, economically disadvantaged, socially isolated, and have minimal or no family support.

**Percentage of total program utilized by Beverly Hills residents/community:** 100%.

### **Quantifiable Services and Measures:**

Care Management: Services will be provided to 50 at-risk Beverly Hills residents age 55+. Care management provides a continuum of supportive services including: assessment, individual care plan, service coordination, monitoring/home visits, emergency response (Lifeline medical alert), and supportive counseling.

Information and Referral: JFS geriatric care managers will provide assistance to older adults, as well as their caregivers, families, and support network, through information and referrals, consultation, short-term counseling, advocacy, and crisis management. JFS will work in collaboration with Beverly Hills staff to identify sites to target Beverly Hills residents.

Community Education: Educational and experiential workshops to address topics of interest to older adults such as effective communication with family members and healthcare providers. Upon request, information and training will be provided for the City's Police and Fire Department personnel in order to help public safety workers determine when a call involving an older adult may warrant a social services referral.

Telephone Reassurance: Supportive check-in calls to frail, homebound seniors to monitor well-being, provide socialization and maintain home safety.

Homecare Support Services: Limited homecare support services to low income, frail Beverly Hills seniors provided by aides through contracted homecare agencies. Aides may assist with bathing, cooking, shopping, cleaning, and other tasks as determined with the client.

**Wraparound Services:** For clients who are facing imminent eviction, pose a safety risk to themselves or the community, or are otherwise at immediate grave risk, intensive short-term Wraparound services will be available. The JFS case manager, after assessing the client's emergent needs, will identify resources in the community and in the client's life that can be utilized to address these needs with the goal of maintaining the client's independence and safety in the least restrictive environment possible. The case manager will then convene a multidisciplinary team (family, healthcare professionals, City departments, neighbors, etc.) to develop a plan to address the client's needs. The case manager will coordinate team operations, monitoring interventions and progress towards goals, and ensuring that all services are delivered with a holistic, person-centered approach.

**Evidenced-Base Programs:** Through a variety of evidence-based classes, older adults and their caregivers will be provided with powerful tools and effective strategies to manage the physical and mental health challenges they face. Classes offered will be based on the needs of the community and may include the Arthritis Foundation Exercise Program and the Chronic Disease Self-Management Program.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

JFS has linked older adult Beverly Hills residents with vital social services since 1992, and is critical to enabling the older adults in the City to age with dignity and independence.

JFS's Beverly Hills Care Management Program is collaborating with the agency's Freda Mohr Multipurpose Center, creating a bridge between Roxbury Park and other venues, and providing Beverly Hills residents access to center based-based activities and events.

JFS works closely with Menorah Housing, which manages the Beverly Hills Senior Housing apartments on Crescent Drive. They collaborate with many other service providers in the area to ensure a coordinated system of care for older adult constituents, providing access to a wide array of resources to meet client needs, while avoiding duplication of services.

**Percentage of annual funding City's contribution represents:** 0.92%.

**Ratio of administrative to operating costs:** 19% administrative, 81% programming

**Service Profile:** Needs-based ☒ Quality of life-based ☐ Social Service ☒

Health ☐ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Jewish Family Service of Los Angeles
ADDRESS:	3580 Wilshire Blvd. Suite 700
CONTACT PERSON:	Sheila Moore, Senior Director of Comprehensive Senior Services
PHONE:	213-260-7962
FAX:	323-761-8801
EMAIL:	smoore@jfsla.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
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Please see attached

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

Please see attached

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Please see attached

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

Please see attached

6. What percentage of your annual funding would the City's contribution represent?

Please see attached

7. What is the ratio of your organization's administrative operating costs?

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- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
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- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City



2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

JFS requests Community Assistance funds from the City of Beverly Hills to continue the services of the JFS Beverly Hills Care Management Program, which supports older adult Beverly Hills residents in maintaining their independent living within the community.

Services to be provided:

Care Management: An array of supportive services will be provided by JFS geriatric care managers to 50 at-risk older adults residing in the City of Beverly Hills, targeting those seniors who are most frail, financially insolvent, socially isolated, or without access to help from family members. Care Management includes the following components:

- **Comprehensive Assessment**: An in-home psychosocial assessment conducted by a geriatric care manager will assess the client's functional level, support network, financial status, and potential safety risks, as well as strengths and abilities.
- **Development of an Individual Care Plan**: The care manager and client will create an Individualized Care Plan which will outline the client's unique needs, develop goals and benchmarks, and identify resources that will help the client remain as independent as possible. The Individual Care Plan will be reviewed regularly and revised as needed.
- **Service Coordination**: The geriatric care manager will link the client with appropriate services, which may include medical/dental/vision services, in-home care, telephone reassurance, the Friendly Visitors program, home-delivered meals, emergency response services, access to government benefits, transportation assistance, and others as needed. The care manager will also support coordination of these services to ensure that the client's comprehensive needs are met.
- **Monitoring/Home Visits**: The care manager will monitor the client's well-being via monthly phone calls and regularly scheduled home visits, ensuring the quality and progress of all received services. Consistent contact with the client will enable staff to provide the most effective care possible, allowing for adjustment of each client's Individual Care Plan as their needs change. Paraprofessional home visitors may assist the geriatric care manager in providing ongoing monitoring of clients in their homes.
- **Emergency Response Services**: JFS will continue to contract with Lifeline Medical Alert Service to provide the frailest and most isolated homebound clients residing in the City of Beverly Hills with in-home medical response services. The current contract includes the initial installation of a medical alert unit and monthly monitoring for three clients at a time.
- **Supportive Counseling**: The geriatric care manager may provide supportive counseling to older adults to help them cope with life transitions through evidence-based best practices. Clients may also be referred to other mental health services offered by JFS and other providers. Social work staff will also routinely assess all clients for depression, suicide risk, alcohol abuse, and medication misuse, making referrals as appropriate.

Information and Resource Referral: JFS geriatric care managers will provide assistance to older adults, as well as to their caregivers, families, and support network, through information and referrals, consultation, short-term counseling, advocacy, and crisis management. JFS will work in collaboration with Beverly Hills staff to identify sites to target Beverly Hills residents.

Community Education: Educational and experiential workshops at Roxbury Park, or other identified locations will address topics of interest to older adults, such as effective communication with family members and healthcare providers, understanding mental health issues, common medication concerns, discussion/reflection groups, stress release and coping skills, and others.

Upon request, information and training will be provided for the city's police, paramedics and fire department personnel in order to help public safety workers determine when a call involving an older adult may warrant a social service referral.

Support Groups for Caregivers: The role of a family caregiver is difficult. Aside from taking care of their loved ones, they must also continue to lead their lives, which often includes working, caring for family, grocery shopping and many other potentially stress-inducing responsibilities. Being in a support group allows caregivers to focus on their own needs, not only the needs of the care receiver. Support groups for caregivers foster sharing information, insight, advice and encouragement. They provide an opportunity to learn from others who face the same challenges, and allow caregivers to talk about their experiences.

Telephone Reassurance: Supportive check-in calls will be made to frail, homebound seniors to monitor their well-being, provide socialization, and maintain their safety in their homes. Trained volunteers from JFS' senior centers will make these calls, under the supervision of professional social workers.

Homecare Support Services: Limited homecare support services to low income, frail Beverly Hills seniors will be provided by aides through contracted homecare agencies. Aides may assist with bathing, cooking, shopping, cleaning, and other tasks as determined with the client.

Wraparound Services: For clients who are facing imminent eviction, pose a safety risk to themselves or the community or are otherwise at immediate grave risk, intensive short-term Wraparound services will be available. The case manager, after assessing the client's emergent needs, will identify resources in the community and in the client's life that can be utilized to address these needs, with the goal of maintaining the client's independence and safety in the least restrictive environment possible. The case manager will then convene a multi-disciplinary team, which might include family members, neighbors, medical professionals, legal counsel, representatives of West Hollywood departments and divisions (i.e. police, human services, housing, etc.) and others as appropriate. The team will develop a plan to address the client's needs. The case manager will coordinate team operations, monitoring interventions and progress towards goals, and ensuring that all services are delivered within a holistic, person-centered approach.

Evidence-Based Programs: It is critical that older adults learn to be active managers of their own conditions. Whether learning exercises to retain their mobility or learning to set and achieve their own goals, older adults need to take a leadership role to stay healthy and active. Similarly, there are a number of tools that can help caregivers to take an active role in managing their own stress as they care for a family member. Through a variety of Evidence-Based classes, older adults and their caregivers will be provided with powerful tools and effective strategies to manage the physical and mental health challenges they face. Classes offered will be based on the needs of the community, and may include:

- *Arthritis Foundation Exercise Program* - Older adults are often afraid to exercise, worried that they will not have the necessary strength or that exercise will exacerbate physical infirmities. In fact, the right kind of exercises can not only increase or maintain range of motion, but can actually build bone density. By consistent, ongoing participation in this class, older adults are

able to remain fit while feeling confident that the exercises will not adversely affect their joints. This group exercise program, developed by the Arthritis Foundation, can help safely make physical activity part of everyday life. The low-impact physical activity is proven to reduce pain and decrease stiffness, and help improve functional ability, self-confidence, self-care, mobility, muscle strength and coordination.

· *Chronic Disease Self-Management Program* - About 80% of older adults have at least one chronic disease, and 68% have at least two. Many adults with conditions such as arthritis, asthma, diabetes, lung disease, heart disease, stroke, osteoporosis, and others struggle to find ways to manage their condition. The Chronic Disease Self-Management Program (CDSMP), developed by Stanford University has been proven to help older adults better manage their chronic conditions, improve their quality of life, and lower health care costs. CDSMP workshops are designed to help people gain self-confidence in their ability to control their symptoms and learn how their health problems affect their lives. Small-group, highly interactive workshops are six weeks long. Workshop topics include:

- How to deal with frustration, fatigue, pain, and isolation
- Ways to maintain and improve strength, flexibility, and endurance
- Managing medications
- How to communicate more effectively with family, friends, and health professionals
- Healthy eating.

### 3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

The services of JFS are critical to enabling the older adults of Beverly Hills to age with dignity and independence.

There are many factors that can impede an older adult's ability to age in place. Medical care for often complex needs, home maintenance, ability to perform necessary activities of daily living and compassionate and appropriate caregiving are all essential to safely remaining at home. JFS offers assistance and resources to address all of these needs. An additional significant risk factor for older adults is social isolation. There is strong evidence linking social needs to health and life expectancy – studies consistently show increased risk of death among persons without sufficient social relationships. One study concluded that the health risks associated with social isolation are as great as the well-known dangers of smoking cigarettes and obesity.

JFS' Beverly Hills Care Management Program is collaborating with the agency's Freda Mohr Multipurpose Senior Center, creating a bridge between Roxbury Park and other venues, and giving Beverly Hills residents access to center-based activities and events.

The agency is also exploring options to bring innovative services to homebound residents, including the use of technology. Research has shown the powerful impact that technology can have on the lives of older adults. A study at the University of Arizona concluded that using social networking can help seniors remain socially active and cognitively engaged, and have a positive impact on their cognitive function, while another at the University of Michigan showed that seniors who use online technology greatly reduced symptoms of depression.

JFS is currently exploring the possibility of utilizing several innovative tools, including a unique technology package that turns any TV into a two-way platform for a set of holistic services. The entire hardware package consists of a small set-top box, an unobtrusive webcam and a large-button remote; there are no unfamiliar devices that the older adult must learn to use. This then allows the older adult to access a spectrum of services, which they can fully participate in. For example, should a program participant choose to take part in a group occurring at a senior center, they can see and hear other participants, both those at the center and others taking part on line (though pop-up windows); the group facilitator/instructor can see and hear each virtual participant. There are many possibilities for content, e.g.:

- Social engagement: Virtual presence at events and holiday celebrations, full two-way video contact with friends and family, unmoderated drop-in groups
- Health and wellness activities: Exercise and nutrition classes, disease self-management, support groups, yoga/meditation sessions, welfare checks/visits from social workers and/or volunteers
- Educational/entertainment content: Classes, workshops, concerts.

Jewish Family Service has worked with the older adults of Beverly Hills for more than 25 years. Our social workers have firsthand knowledge of the needs of the community. The need is underlined by the consistent demand for our services; in fact, because of new outreach efforts, intakes and referrals have doubled in the past year and are expected to increase. Additional funding is being requested to respond to the needs of all residents of Beverly Hills who can benefit from services.

The tremendous impact of these services can be illustrated by the following vignettes:

· S is an 89 year old frail, cognitively impaired and wheelchair bound Holocaust survivor who lived in an apartment with a caregiver hired by her grandson, who lives out of state. To give the caregiver respite, JFS was provided caregiving on weekends. While providing this weekend service, the JFS caregiver discovered that the client was being physically and emotionally abused by the primary caregiver. The social worker filed a report with Adult Protective Services, and the police were called. The abusive caregiver was removed from the home. Horribly, it was discovered that S had been lying in bed with a broken leg; she was transferred immediately to a hospital and then to a Skilled Nursing Facility. S and her family are very grateful to JFS; she said that she was too fearful of the caregiver to speak up, and if it wasn't for the involvement of the JFS caregiver she might still be in that terrible situation. She now feels safe and is being well cared for in the Skilled Nursing Facility.

· Mrs. B. is a 99 year old woman living by herself in an apartment. She was referred to JFS by a concerned friend, who recognized that Mrs. B. needed some assistance with maintaining a hygienic living environment as well as with food shopping and transportation. She had lived in the same building for decades, but due to increased frailty and difficulty getting around, had been having trouble with upkeep of her apartment. This had led to a roach infestation that had spread to other apartments in the building. The JFS social worker met with Mrs. B and explained the resources available through the of the Beverly Hills Care Management Program. Initially Mrs. B refused any assistance. However after she was served with a 3-day eviction notice, the social worker made a second home visit to again offer services that might allow Mrs. B to remain in her home; she reluctantly agreed. The social worker arranged for deep housecleaning, which allowed the building manager to fumigate the apartment. Mrs. B also accepted ongoing homecare assistance in order to maintain a clean living environment. Despite her initial resistance, after a few weeks Mrs. B admitted that it was helpful to have someone take her to

doctor's appointments and help around the house. Her struggles with balance and ambulation caused Mrs. B to be a high risk of falling, so the social worker also arranged for an emergency alert. Mrs. B is very afraid of losing her independence and not being in control of her life and environment; after ongoing discussions and building a relationship with the social worker, she has come to realize that the services she receives from JFS allow her to continue living at home, as independent as possible.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

100% of clients currently receiving services from this program are members of the Beverly Hills community.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

Jewish Family Service of Los Angeles (JFS) is requesting support in the amount of \$275,000 for this coming fiscal year. JFS has provided services to the older adult residents of Beverly Hills for many years, and plans to continue to do so by reapplying during future funding cycles.

6. What percentage of your annual funding would the City's contribution represent?

0.92%

7. What is the ratio of your organization's administrative operating costs?

81% programs, 19% administration and fund-raising

TAB<sup>3</sup><sub>14</sub>

## APPLICATION SUMMARY FY 2018/19

**Agency:** Loving Home Hospice for Children, Inc.

**Requested amount:** \$10,000

**History of City funding:** Applied for funding in FY 2016/17, and in FY 2017-18, but did not receive grant funding.

**Agency description:** Provides hospice and palliative care for children in the community.

**Proposed use of Community Assistance Grant Funds:** Hospice and palliative care for the patient. Palliative care is an approach that improves the quality of life of patients and their families facing the problem associated with life-threatening illness, through the prevention and relief of suffering by means of early identification and impeccable assessment and treatment of pain and other problems, physical, psychosocial and spiritual.

**Target population/Primary service:** Children in need of hospice care in Los Angeles and Ventura Counties.

**Percentage of total program utilized by Beverly Hills residents/community:** Currently, 10-15% of Loving Home Hospice for Children's patients and their families are located in the Beverly Hills community.

**Quantifiable Services and Measures:** Will be able to quantify and measure impact based on enrollment and community participation numbers.

**Historical Performance:** N/A

**General Comment(s)** *(e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):*

This is Loving Home Hospice's third application for CAGF support, although the organization did not receive funding with their first two applications in FY 2016/17 and FY 2017/18.

**Percentage of annual funding City's contribution represents:** The grant amount of \$10,000 would represent approximately 5% of Loving Home Hospice for Children's annual funding.

**Ratio of administrative to operating costs:** 25% of the organization's budget goes to administrative costs.

**Service Profile:** Needs-based ☐ Quality of life-based ☒ Social Service ☒

Health ☒ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY  
HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING  
APPLICATION FY 2018-2019

AGENCY/PROJECT NAME:	Loving Home Hospice for Children Inc
ADDRESS:	6271 Variel Ave #A Woodland Hills, CA 91367
CONTACT PERSON:	Bobby Davis
PHONE:	805-210-5916
FAX:	
EMAIL:	lovinghomehospice@gmail.com

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?

☒ We are a 501c.3                      ☐ We are in a partnership with a 501c.3

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2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

Loving Home Hospice provides both hospice and palliative care in ways that no other entity in the Beverly Hills community, including hospitals, provide currently. The first major service unmet is the underwhelming number of children who do not have their needs met during such dire times in their life in both Beverly Hills and the Los Angeles community. Much like the seniors of great importance in the city, it is important to extend the same care to the youth who have an equal amount of trouble fighting these medial troubles alone. There are also many children who are a part of an ever-growing homeless sect in Beverly Hills who unfortunately may experience hardships that lead to serious and even terminal illnesses. They too deserve the same care and respect as all individuals.



3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

Hospice and palliative care for children in Beverly Hills is critical because not only does it increase the quality of life for those in the community but has a very direct and indirect impact on many others including their relatives, classmates, and other members of the community. Referring back to Question two, a large concern in BH is homelessness, by providing a space for those kids in need and their parents it would also impact the improvement of the statistic. Understanding our responsibility to those who can not take the best care of themselves is very much an American principle that every community should take place in.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

We service Los Angeles county with approximately, 10-15% of those children and families being located within the Beverly Hills community. If requested there can be stories of experiences told to the committee in writing from community members who do not wish to speak in public.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

The amount that Loving Home Hospice for Children Inc is seeking is for \$10,000 toward servicing those members of the youth in the Beverly Hills community. Yes it would be greatly appreciated to continue our relationship with the city who has been very supportive thus far in believing in the idea of our cause. With more support in terms of this grant, it would only strengthen our relationship and the reapplication process.

6. What percentage of your annual funding would the City's contribution represent?

The BH Grant would account for a little over 5 percent of our annual spending, a breakdown of our usual spending will accompany which can be found on our latest taxes.

7. What is the ratio of your organization's administrative operating costs?

1/4th of our budget goes to Administrative operation costs

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

We have held events at HOME in Beverly Hills which has recently shuttered, to fundraise for the organization, developing a level of support within the community there. We have also had on our board locals such as Richard Weintraub as well as healthy relationships with Karla Gordy. Loving Home Hospice has also worked closely with the Rotary Club locally including past president AJ.

Our board of directors contains Richard Weintraub, Matthew Joynes, Dr. Willye Powell, and Judge Vincent Hill.

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership, Copy of most recent Form 990 - Return of Organization Exempt from Income Tax, Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)

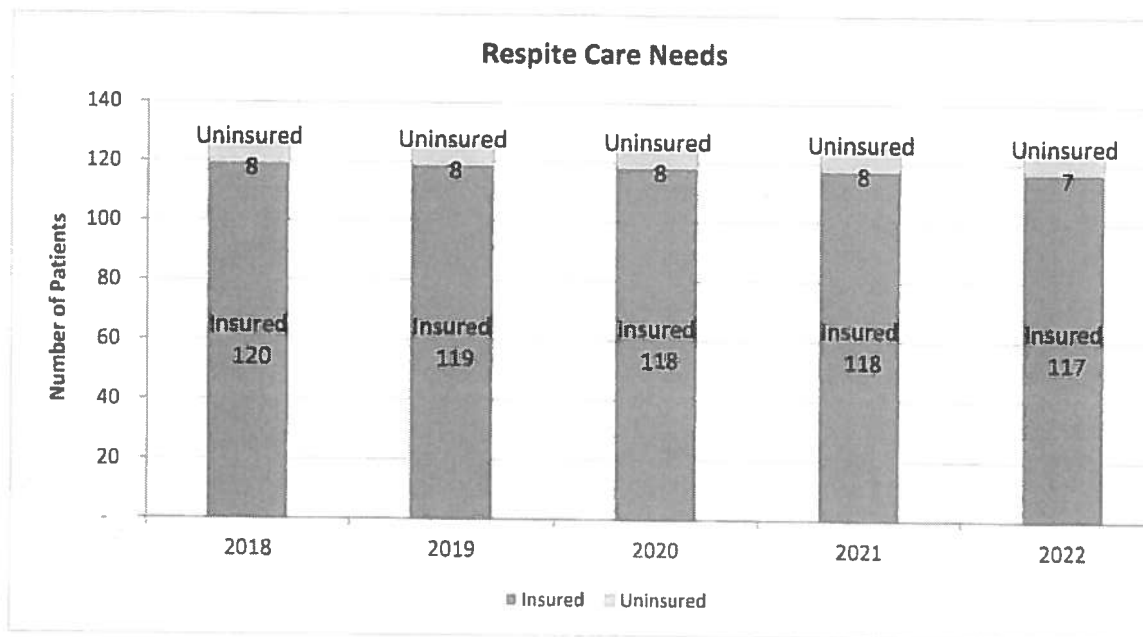
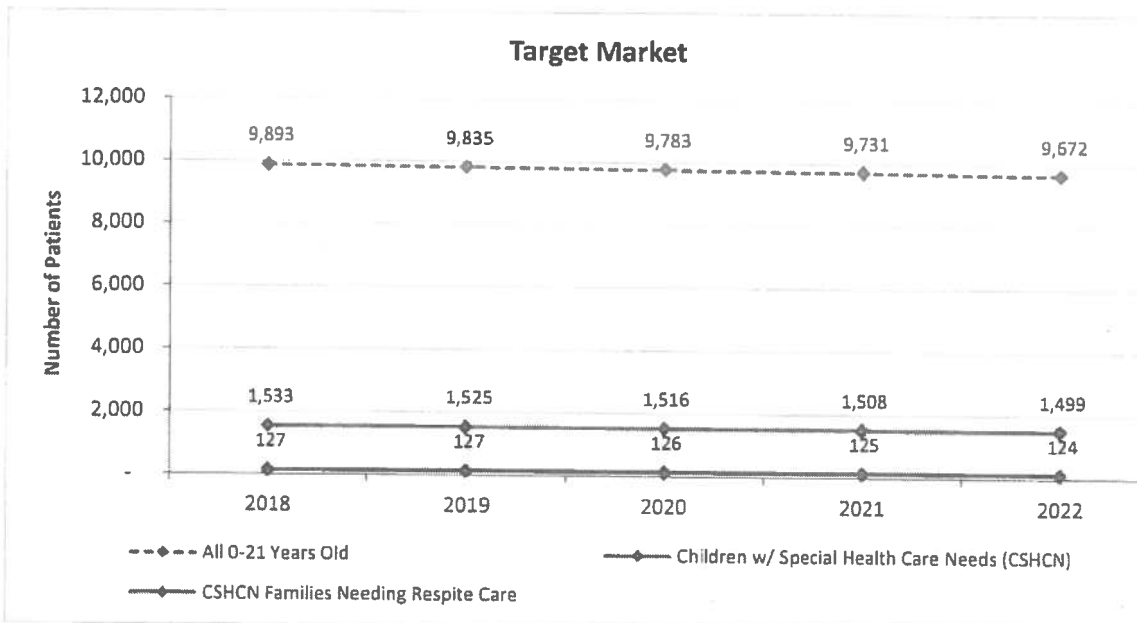
The City must be named as additionally insured under each policy

Subrogation must be waived for each insurance policy

An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

# Loving Home Hospice Projected Respite Care Patients

Beverly Hills City

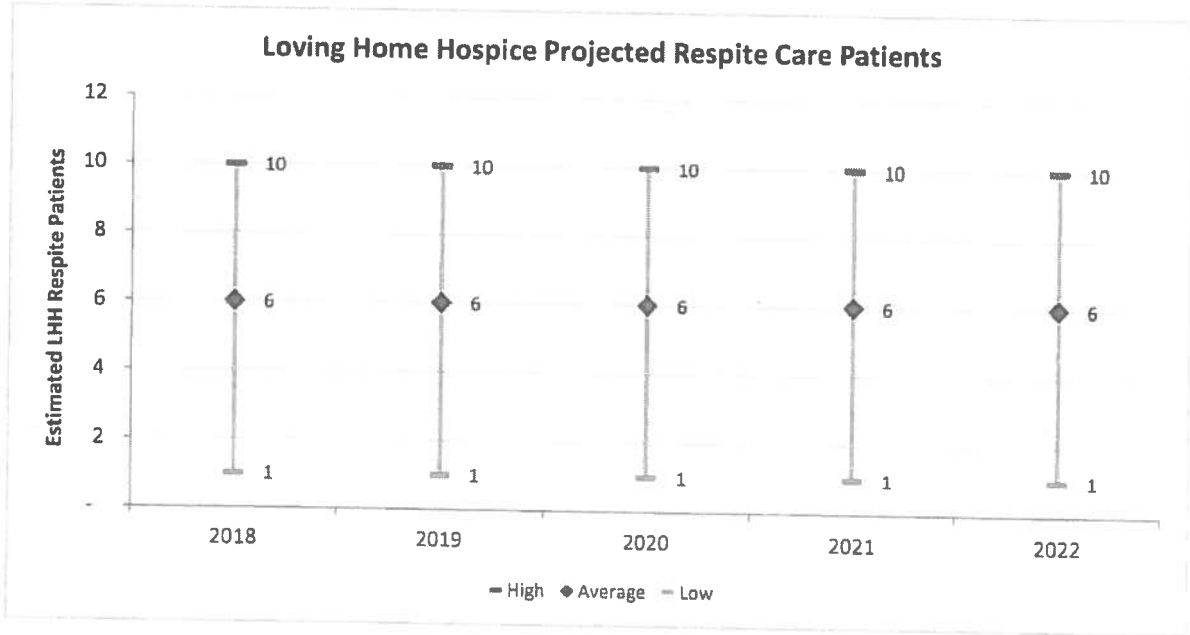


	2018	2019	2020
Beverly Hills County Population (0-21 y.o.) <sup>1</sup>	9,893	9,835	9,783
<b>Total Target Population (0-21 y.o.)</b>	<b>9,893</b>	<b>9,835</b>	<b>9,783</b>
Prevalence of CSHCN <sup>2</sup>	15.5%	15.5%	15.5%
<b>Total CSHCN</b>	<b>1,533</b>	<b>1,525</b>	<b>1,516</b>

% CSHCN Families Needing Respite Care <sup>3</sup>	8.3%	8.3%	8.3%
<b>LHH Target Market</b>	<b>127</b>	<b>127</b>	<b>126</b>
% Insured Children <sup>4</sup>	94.0%	94.0%	94.0%
<b>LHH Insured Target Market</b>	<b>120</b>	<b>119</b>	<b>118</b>
<b>LHH Uninsured Target Market</b>	<b>8</b>	<b>8</b>	<b>8</b>
Market Share (High) <sup>5</sup>	7.4%	7.4%	7.4%
Market Share (Low) <sup>5</sup>	0.6%	0.6%	0.6%
Estimated LHH Patients (High)	10	10	10
Estimated LHH Patients (Average)	6	6	6
Estimated LHH Patients (Low)	1	1	1
<b>Estimated LHH Respite Patients</b>	<b>1 - 10</b>	<b>1 - 10</b>	<b>1 - 10</b>

**Source:**

- 1) Target Population (0-21 yrs old) Projection for Beverly Hills City is estimated using Los Angeles County Population projection and Beverly Hills City Population as percentage of Los Angeles County Population.  
Projections Prepared by Demographic Research Unit, California Department of Finance, February 2017, May 2017
- 2) Prevalence of Children w/ Special Health Care Needs in California is 15.5%  
Findings from the 2016 National Survey of Children's Health
- 3) 8.3% of CSHCN families in California needed respite care.  
Findings from the 2009/10 National Survey of Children with Special Health Care Needs.
- 4) 94% of children 0-18 yrs old have health insurance coverage.  
Kaiser Family Foundation. 2015 Health Insurance Coverage for children 0-18 yrs old.
- 5) The four largest hospice providers only capture 17% of the market with market share ranging from 0.6% to 7.4%.  
Harris Williams & Co: Hospice Industry Overview.



2021	2022
9,731	9,672
<b>9,731</b>	<b>9,672</b>
15.5%	15.5%
<b>1,508</b>	<b>1,499</b>

8.3%	8.3%
<b>125</b>	<b>124</b>
94.0%	94.0%
<b>118</b>	<b>117</b>
<b>8</b>	<b>7</b>
7.4%	7.4%
0.6%	0.6%
<b>10</b>	<b>10</b>
<b>6</b>	<b>6</b>
<b>1</b>	<b>1</b>
<b>1 - 10</b>	<b>1 - 10</b>

TAB  
15



## APPLICATION SUMMARY FY 2018/19

**Agency:** People Assisting the Homeless (PATH)

**Requested amount:** \$95,000

**History of City funding:** 1994-96: \$10,000 annually; 1997-98: \$25,000; 1992-2002: \$35,000; 2003-2005: \$40,000 annually; 2006: \$44,500; 2007: \$50,500; 2008/9: \$52,000; 2009/10: \$47,000; 2010/11: \$52,350; 2011/12: \$51,039; 2012/13: \$75,000; 2013/14: \$75,000; 2014/15: \$95,000; 2015/16: \$95,000; 2016/17: \$95,000; 2017/18: \$95,000.

**Agency description:** PATH is a family of agencies working together to end homelessness for individuals, families, and communities throughout California. PATH provides interim and permanent housing and supportive services for people in need.

**Proposed use of Community Assistance Grant Funds:** PATH will provide five year-round interim housing beds (\$52/bed/night) for individuals referred by City of Beverly Hills. Services are housing-centric, focusing on connecting participants with permanent housing through LA County's Coordinated Entry System and providing supportive services. Beverly Hills clients are given priority access to PATH's wide range of housing resources.

**Target population/Primary service:** Homeless individuals living on the streets in Beverly Hills. The primary service moves individuals from the street to permanent housing.

**Percentage of total program utilized by Beverly Hills residents/community:** 100% of the clients to be served in the Beverly Hills supportive housing program proposed for 2018/19 will have been official referrals from the City; Beverly Hills clients represent approximately 6% of the total clients served through PATH's Metro Los Angeles Interim housing program.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations): PATH's interim housing program is a key tool used by the City's CLASP team to engage Beverly Hills' high-barrier homeless individuals in services and eventually placement in permanent housing. Permanent housing is the most cost-effective long-term solution to addressing homelessness in the City.

**Percentage of annual funding City's contribution represents:** Approximately 0.02% of the total organizational budget.

**Ratio of administrative to operating costs:** 11% administrative: 88% program and 1% fundraising.

**Service Profile:** Needs-based ☒ Quality of life-based ☒ Social Service ☒

Health ☐ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



**CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019**

<b>AGENCY/PROJECT NAME:</b>	PATH (People Assisting the Homeless)
<b>ADDRESS:</b>	340 N. Madison Ave. Los Angeles, CA 90004
<b>CONTACT PERSON:</b>	Melissa Khamvongsa, Senior Director of Institutional Giving
<b>PHONE:</b>	(323) 644-2211
<b>FAX:</b>	(323) 666-2288
<b>EMAIL:</b>	grants@epath.org

Please type your answers to the following questions:

1. **Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?**  
☒ **We are a 501c.3**      ☐ **We are in a partnership with a 501c.3**  
  
☒ **Documentation showing 501c.3 status or partnership with a 501c.3 is attached.**
2. **What services do you propose to provide the Beverly Hills community that local government is not currently providing?**

PATH proposes to continue its service to the Beverly Hills community by continuing to provide year-round access to five (5) interim housing beds for homeless individuals referred by Beverly Hills officials, including the Changing Lives and Sharing Places (CLASP) team, the Human Relations Department staff, and the Police Department. All services will be housing-centric, focusing on connecting program participants with appropriate housing and providing the wraparound supportive services they need to overcome their individual barriers to long-term housing stability.

Our interim housing, located at 340 N. Madison Ave., is low-barrier and does not require sobriety or participation in services as a pre-requisite, allowing us to work more effectively with high-needs chronically homeless individuals that make up Beverly Hills' homeless population. After referral, homeless individuals will receive comprehensive

case management and service navigation. This comprehensive model serves high-needs clients by combining two evidence-based approaches—peer support and harm reduction—alongside recovery principals, motivational interviewing, and kinship. Navigation is a supplement to any other entitlements, including case management, available to an individual through other service providers (mental health care, substance abuse treatment, etc.), and serves to connect the dots of the myriad systems an individual must negotiate to successfully end their homelessness. The model is proven the most effective approach to helping chronically homeless and high-needs individuals get off the streets in communities across the country.

All of PATH's clients are assigned to a case manager (9:1 ratio) who assists them with the process of finding housing. Navigators (i.e. case managers) work closely with each resident to develop an Individual Housing & Services Plan (IHSP) which details his/her individual barriers, establishes specific housing and service goals, and outlines the steps and services necessary to achieve those goals. Navigators meet with each resident at least once per week to discuss his/her progress, address any challenges and issues that may arise, and connect him/her with intensive wraparound supportive services, including: health care, mental health care, substance abuse treatment, employment services (adult education, vocational training, and job placement assistance), housing location, legal aid, public benefits assistance, domestic violence counseling, support groups, Veterans services, personal care, and more. Our Navigators also work tirelessly to cultivate relationships with landlords and property management companies in order to identify appropriate housing opportunities for our clients. We currently have relationships with more than 1,100 landlords who are willing to lease to the people we serve. Service staff will also work to link clients from Beverly Hills with appropriate permanent housing through the county-wide Coordinated Entry System (CES), and will connect clients with housing vouchers through Section 8 and our contracts with the Department of Veterans Affairs (VA) and Department of Health Services (DHS), as appropriate and available. Navigators use a "whatever it takes" approach to help clients successfully navigate the services and systems they encounter throughout their involvement with PATH. If a client needs transportation to an appointment, help filling out an application for benefits, or other hands-on assistance, PATH's Navigators provide all the support necessary to ensure he/she can successfully access services.

PATH will place homeless individuals from Beverly Hills who need, and are willing to access, an immediate safe place to stay into our interim housing. To further assist those clients who are ready to transition into permanent housing, PATH has designated funds to provide homeless individuals from Beverly Hills with limited financial assistance to cover their initial move-in costs. By connecting homeless individuals residing in Beverly Hills with these comprehensive housing resources along with an array of supportive services, PATH will continue to reduce unsheltered homelessness in the City.

In addition to directly serving people experiencing homelessness, PATH will continue to partner with and educate Beverly Hills City representatives, law enforcement officials, and business owners to help them understand the issues surrounding homelessness and provide the resources and information they need to appropriately assist homeless individuals they encounter. PATH will continue to work closely with the Beverly Hills City

staff to assist them homeless individuals stay in PATH's Interim facility every day between the hours of 7:00am until 9:00pm.

Our supportive housing approach effectively responds to the diverse needs of homeless individuals by providing wraparound services to each client from the moment they are first referred to our programs and continuing follow-up after placement into stable housing. This approach ensures that each client receives the full range of services and support they need to get off the streets and maintain housing stability. We meet the basic needs of people experiencing homelessness by providing residents with clean beds, nutritious meals, and access to restroom, shower, and laundry facilities. These programs utilize a low-barrier, harm reduction approach, coupled with housing-focused education and supportive services that are person-centric. This approach maximizes residents' physical, economic, and emotional well-being.

To more effectively meet the complex case management, health, and housing needs of the extremely vulnerable and high-needs population served by this program, PATH has hired management and direct line staff with training and/or experience in mental health and co-occurring disorders. PATH has a combination of clinical staff (LCSW, MSW, BA level) with specialized experience and peer support training, and has established a new staffing system that ensures case management staff are available seven days a week for clients staying in our interim housing beds. This represents a drastic shift in the level of service provided by our staff, which allows PATH to provide our clients with more comprehensive care and support.

PATH's comprehensive, individualized approach helps end homelessness in Beverly Hills by providing person-centered case management and supportive services that help people experiencing homelessness transition into permanent homes and stay in those homes long-term. We strongly believe that the interim and permanent housing solutions we provide are crucial in order to effectively address the needs of people experiencing homelessness in Beverly Hills.

**3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?**

Beverly Hills, like many other cities, struggles with the social, economic, and ethical complexities of the homelessness crisis. The 2017 Beverly Hills homeless count found that there are 31 homeless individuals living on the City's streets on any given night, more than double last year's number. Though families and people experiencing homelessness for the first time represent a large portion of homeless individuals in many communities, accounts from our street outreach team, police officers, staff, and community members indicate that the vast majority (at least 80%) of homeless individuals in Beverly Hills are chronically homeless and/or have a severe mental illness.

Chronically homeless individuals are often initially resistant to services and require an intensive level of support in order to successfully transition off the streets. They typically face significant barriers to obtaining and maintaining stable housing, including severe

mental illness, distrust of the “system,” and/or an inability to obtain documentation, identification, and income. These individuals typically have little to no income, and are often “unemployable” due to chronic illnesses, severe mental health issues, and/or substance abuse problems. The only income to which this population has access is typically through public benefits like SSI or General Relief, and often individuals are not taking full advantage of benefits for which they may be eligible, either due to lack of knowledge about these programs or difficulty accessing them.

Additionally, chronically homeless individuals are also far more likely to suffer from health problems than their housed peers. In fact, with the exception of cancer, obesity, and stroke, homeless adults are far more likely to have chronic medical conditions (e.g., HIV, diabetes, etc.) and more likely to suffer complications due to their lack of regular medical care and stable housing. Long-term mental health issues occur in over 60 percent of chronically homeless people, and more than 80 percent experience lasting alcohol and/or drug problems, according to a report by The Urban Institute titled “Helping America’s Homeless.” These serious conditions make chronically homeless individuals disproportionately susceptible to premature death; the average life span for a person living on the streets is 30 years shorter than that of housed individuals.

Often, the individuals living on Beverly Hills’ streets have entered interim housing programs several times but have eventually returned to the streets because they were unable to obtain or maintain permanent housing. Worse, chronically homeless individuals often cycle in and out of jails, hospitals, and/or mental health facilities, placing a tremendous burden on taxpayers, local law enforcement, and the community at large. According to some reports on the cost of chronic homelessness, a chronically homeless individual can cost a community more than \$8,000/month in public funds (Flagger et al: Where We Sleep, 2009). This estimated cost does not include the loss of revenue to businesses due to potential customers’ fear of being approached by homeless individuals who panhandle in front of stores.

The provision of wraparound supportive services and permanent housing assistance will not only improve the quality of life of both Beverly Hills’ homeless and housed residents, it also has the potential to drastically reduce public costs. Successes in communities across the country have proven that rapidly placing homeless individuals into permanent supportive housing is the most cost-effective and sustainable solution to ending homelessness, particularly for those who are chronically homeless.

PATH’s supportive interim housing approach, with its focus on long-term housing stability, addresses the problem of homelessness in Beverly Hills by providing homeless individuals living in the City with the resources they need to secure and maintain permanent housing. Through our innovative service collaborative, partner service agencies, and the county-wide Coordinated Entry System, we are able to help homeless individuals address their personal barriers and successfully identify, transition into, and retain permanent homes. We also maintain partnerships with several physical and mental health organizations throughout Los Angeles County to address the chronic health needs of homeless individuals, including agencies like Gateways Hospital, JWCH Institute, Saban Community Clinic, Hollywood Mental Health, Edelman Mental Health

Center, Prototypes, Step Up on Second, and the Los Angeles County Departments of Health (DHS) and Mental Health (DMH).

With five year-round interim housing beds and access to a wide range of permanent housing resources through PATH's housing location services, housing vouchers, and the Coordinated Entry System, PATH's program will help individuals living on the streets of Beverly Hills move into permanent homes. These individuals will consequently require fewer social services and will no longer be forced to commit "quality of life" crimes, like panhandling, that drive customers away from local businesses and public spaces. Assisting homeless individuals to obtain stable housing will also help alleviate the burden on local public libraries, where people experiencing homelessness often go for warmth and safety and hospital emergency rooms, which frequently find themselves providing basic health services for homeless individuals who have nowhere else to go for care. By helping people who are homeless transition off the streets and reintegrate into the community, PATH will ensure the cleanliness and security of public places, increase the success of local businesses, and demonstrate the City's commitment to providing for the basic needs of all its citizens and ending homelessness in the community.

- 4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?**

Approximately 6% of total clients served through our Metro Los Angeles interim housing program are members of the Beverly Hills community. 100% of the clients served by the Beverly Hills program (the 5 dedicated beds) regularly resided in the City of Beverly Hills prior to entering the program.

- 5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?**

PATH respectfully requests a \$95,000 grant from the City of Beverly Hills to provide interim housing, intensive case management, wraparound supportive services, and permanent housing placement to five homeless individuals from Beverly Hills at any given time. This amount will cover direct service costs (\$52 per bed night) and allow for a small percentage (\$9,500, or approximately 10%) to go toward administrative costs associated with the coordination of services, acceptance of referrals from the Beverly Hills Human Services Department and Police Department, and grant administration and reporting. PATH plans to reapply for annual program operational funding during future cycles in order to provide the same or similar services to the City of Beverly Hills in upcoming years.

**6. What percentage of your annual funding would the City's contribution represent?**

The amount requested from the City of Beverly Hills represents approximately 0.20% of PATH's total organizational funding for Fiscal Year 2017-18.

**7. What is the ratio of your organization's administrative operating costs?**

According to the organization's most recently-completed Form 990, PATH's operating expenses break down as follows: 11% administrative, 88% program, and 1% fundraising.

**8. Financial Statement:**

- a. **For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.**
  - b. **For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.**
- 9. Provide any additional information that may be useful in evaluating your proposal. Cultural applicants, please describe your program here.**

PATH has successfully implemented the combined interim and permanent housing placement approach to address homelessness in cities and communities across the greater Los Angeles area, and we are excited to continue using this approach to move the highest-barrier homeless individuals living on the streets of Beverly Hills into stable housing.

We strongly believe that permanent supportive housing is the most viable and cost-effective long-term solution to addressing homelessness in the City. We remain committed to furthering our 17-year partnership with the City of Beverly Hills and are always open to discussing ways in which we can enhance the programs and services we provide should the City so desire. Thank you for your consideration of this grant request, and we look forward to continuing our partnership with you in the upcoming year.

Submission of the following documents is required:

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City



TAB 16

## APPLICATION SUMMARY FY 2018/19

**Agency:** Saban Community Clinic

**Requested amount:** \$50,000

**History of City funding:** 1992-3: \$10,000 annually; 1994: \$15,000; 1996-97: \$18,150 annually; 1998: \$25,000; 1999-2002: \$35,000 annually; 2003-6: \$40,000; 2007: \$40,000; 2008/9: \$41,200; 2009/10: \$5,000; 2010/11: \$5,000; 2011/12: \$6,111; 2012/13: \$6,111; 2013/14: \$10,000; 2014/2015: \$25,000; 2015/16: \$30,000; 2016/17: \$35,000; 2017-18: \$35,000

**Agency description:** Saban Community Clinic (SCC) serves as a medical home for the underserved and those who are most vulnerable by providing comprehensive, dependable, and affordable quality health care in a caring environment. A cornerstone in the safety net for the poor and uninsured, Saban combines community-based outreach and education initiatives with medical, dental, behavioral health, and specialty care services.

**Proposed use of Community Assistance Grant Funds:** Support the delivery of health and social services to Beverly Hills' low-income, underserved residents.

**Target population/Primary service:** Uninsured and under-insured population of Los Angeles County/health care and services.

**Percentage of total program utilized by Beverly Hills residents/community:** From January 1, 2017 to December 31, 2017, SCC served 447 Beverly Hills residents, and provided 2,115 patient visits to Beverly Hills residents. This number is an increase to the prior calendar year of over 880 visits (1234 visits in 2016), and patient visits for Beverly Hills residents have nearly doubled year after year. Sixty-five percent of all Beverly Hills patients were at the 0-100% of the Federal Poverty Level, and over nine in ten were living at 200% or below. Of this group 7% were homeless.

**Quantifiable Services and Measures:** From January 1, 2017 to December 31, 2017, SCC served 447 Beverly Hills residents. SCC provided 2,115 patient visits to Beverly Hills residents over the course of the year, and increase of 880 from the previous year (1234). Patient visits have nearly doubled year over year with Beverly Hills residents. Of the patients served, six out of ten were women, and 45% were between the ages of 40 and 59. The majority of all patients identified at White, including Hispanics, accounting for 70% of all patients. Of the Beverly Hills patients served, 65% were at the 0-100% of the Federal Poverty Level and over nine out of ten patients were living at 200% or below. Lastly, 7% of the latter group were homeless.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

SCC offers a wide array of primary and specialty care services including primary and preventative health care, cancer screenings, women's health services, and confidential HIV testing. Dental services include diagnostic visits, including oral exams, x-rays, emergency care, cleanings and preventative care education. SCC also offers behavioral health services

including evaluations, group counseling and treatment for mental health issues. Specialty care services include showers for homeless individuals, vision services, smoking cessation groups and nutrition education.

SCC has created programs and developed strategic partnerships in response to the community's needs. These include, but are not limited to annual health screenings, community dental work (children and adults), and colorectal cancer screenings.

**Percentage of annual funding City's contribution represents:** The City's funding would represent less than 1% of SCC's overall revenue.

**Ratio of administrative to operating costs:** 4% administrative/fundraising, 96% services

**Service Profile:** Needs-based ☒ Quality of life-based ☐ Social Service ☐

Health ☒ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Los Angeles Free Clinic DBA <b>Saban Community Clinic</b>
ADDRESS:	8405 Beverly Blvd, Los Angeles, 90048
CONTACT PERSON:	Amy Cabranes, Grants Manager
PHONE:	(323) 330-1664
FAX:	(323) 330-1657
EMAIL:	acabranes@sabancommunityclinic.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3                      ☐ We are in a partnership with a 501c.3

☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

Saban Community Clinic's (SCC) mission is to serve as a medical home for the underserved and those who are most vulnerable by providing comprehensive, dependable and affordable quality healthcare in a caring environment. Founded as The Los Angeles Free Clinic in 1967, SCC has built a reputable history in providing integrated medical, dental, behavioral health, and specialty care services, in collaboration with strategic partners, to low-income, medically deprived people in Los Angeles. SCC works to reduce healthcare disparities for historically disadvantaged groups, including recent immigrants, HIV positive patients, and people experiencing homelessness. Today, SCC is a prominent healthcare resource – providing healthcare programs and services that address the needs of those hardest hit by persistent poverty. SCC operates at three clinical sites in Los Angeles County, including the Beverly Health Center, S. Mark Taper Foundation Health Center, and the Wallis Annenberg Children and Family Health Center.

SCC offers a wide array of important primary and specialty care services within one medical home. Medical services include primary and preventative health care, cancer screenings, women's health services, and confidential HIV testing. Dental services include diagnostic visits, including oral exams and x-rays, emergency and palliative care, as well as cleanings and preventive care education. SCC also offers Behavioral Health services to ensure its clients' needs are met across the healthcare spectrum. Services include individual and group counseling, as well as evaluations and treatments for patients suffering from depression, anxiety or other mental health issues. Specialty care services include showers for people experiencing homelessness, vision services, smoking cessation groups and nutrition education programs.

Saban Community Clinic has created programs and developed strategic partnerships in response to community needs. These include, but are not limited to:

a) **Annual Health Screenings** – these screenings play a key role in preventive care to ensure patients remain in good health. SCC's dedicated team of Preventive Care Coordinators track and monitor patients in need of additional screenings. Individual outreach and reminders help patients stay on top of future appointments.

b) **Community Dental Work** - Our Dental Clinic provides affordable, primary dental care for children and adults. In 2016, we provided 14,975 dental visits and implemented two innovative patient outreach campaigns to encourage good oral hygiene habits in children from a young age. In the summer, we held a Dental Carnival for the community with fun activities for adults and kids, plus free giveaways including dental kits and toothbrushes.

c) **Colorectal Cancer Screenings** - The American Cancer Society (ACS) identified SCC as a leader in California for colorectal cancer screenings after it saw a 48 percent increase in screening rates. Thanks to an ACS grant, the Clinic introduced an innovative bilingual outreach campaign that garnered attention from clinics around the country. The campaign encouraged patients to get screened for colorectal cancer by "Checking Their No. 2." The toilet paper campaign integrated marketing strategies with clinical work to deliver an impactful screening message.

Overall, Saban Community Clinic continues to make strides in improved quality and service. SCC aims to ensure that the patient experience is the best it can be, successfully gaining certification as a Patient-Centered Medical Home (PCMH) by the National Committee for Quality Assurance in 2017. SCC staff is committed to a holistic model of integrated care that strengthens the physician-patient interaction, provides coordinated team care, and establishes a long-term healing relationship to enhance a patient's overall health care experience. In 2016, SCC began implementing the fundamentals of the PCMH integrated care model and have already seen significant improvements in patient satisfaction, quality of care and wait times being reduced by almost 40 percent.

### 3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

SCC functions on its founding principle that quality healthcare is a right, not a privilege. Poverty and poor health are inextricably linked, and are rooted in political, social and economic injustice. Poverty both causes and is a consequence of poor health. Chronic disease is rampant in low-income populations for a variety of reasons, including food deserts, dangerous working conditions, and the lack of flexible time to seek treatment. Without access to SCC, many patients would fall through the cracks. They would

not receive adequate care for complex, chronic diseases. SCC provides comprehensive healthcare to disadvantaged people and communities in order to meet their essential healthcare needs. SCC helps clients get healthy so they can participate, prosper and reach their full potential.

SCC is located in and serves Metropolitan Service Planning Area 4 (SPA 4) of Los Angeles County. SPA 4 has a population of over 1 million people, and 1 in 4 of the residents live at or below 100% of the Federal Poverty Level. More than 1 in 3 people are uninsured and have difficulty accessing medical care. Beverly Hills is located within SPA 4. Despite being one of the most sought after zip codes in the country, one in 10 people in Beverly Hills lives below the poverty line. Those struggling with poverty, often have to choose between paying rent, buying food or receiving healthcare. SCC means that Beverly Hills residents with limited incomes can receive the healthcare they require in a caring environment close to home.

More broadly, SPA 4 also contains 29% of Los Angeles County's homeless population, leading to complex public health and healthcare delivery issues. The Homeless Healthcare Services program is one of SCC's most important programs. SCC is one of the few community health clinics in Los Angeles that offers free showers for the homeless, and the program hosts more than 7,000 showers a year. It is a service that SCC has provided for more than 20 years to help promote a sense of dignity, hope, and overall wellness for our homeless neighbors. The showers are more than just a way to stay clean or even to reduce disease transmission. They can be a pathway off the streets, and the first step in helping homeless clients regain control of their lives. SCC's staff uses the shower service as an opportunity to provide dignity and build relationships.

At each of SCC's three sites, services for the homeless are integrated within the clinic system to foster an inclusive community and provide the best patient care. SCC's Homeless Healthcare Services program is patient centered and incorporates a full scope of services. This program acts as a gateway for shower participants to receive medical and dental care, behavioral health services, and other services such as HIV testing, and linkages to food resources and housing programs. Finally, the Clinic helps people experiencing homelessness become healthier, get back on their feet and thus have a greater chance at earning an income.

SCC is committed to serving all people – including Beverly Hills residents - in need of affordable, quality healthcare.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

From January 1, 2017 to December 31, 2017, SCC served 447 Beverly Hills residents. SCC provided 2,115 patient visits to Beverly Hills residents over the course of the year. This is a sharp increase of over 880 visits from the previous year's total (1234). Patient visits nearly doubled year over year, indicating a high need by Beverly Hills residents for SCC's services. Of the patients served, 6 out of 10 were women and

almost half (45%) were between the ages of 40-59. The majority of patients identified as White, including Hispanics, accounting for 70% of all patients. It is important to note that 65% were at the 0-100% of the Federal Poverty Level, and over 9 in 10 patients were living at 200% or below. Of this group, 7% were homeless.

PATIENT #s	ALL SERVICES	MEDICAL	DENTAL	BEHAVIORAL	SPECIALTY
PATIENTS	447	396	138	8	47
VISITS	2115	1259	387	38	66
Avg # VISITS	4.7	3.2	2.8	4.75	1.4

DEMOGRAPHICS	GENDER		RACE				AGE			
	Male	Female	African-American	Asian-Pacific	Mixed/Other	Whites/Hispanics	0-19	20-39	40-59	60+
ACTUAL #	179	268	54	48	28	317	25	93	205	124
PERCENTAGE %	40%	60%	12%	10%	6%	70%	5%	21%	46%	28%

SCC is an important healthcare provider for Beverly Hills residents, especially for those struggling with poverty or homelessness. As the data indicates, last year there was a significant increase in Beverly Hills residents served and a marked increase in patient visits. The data demonstrates that despite the general perception of high wealth in the City of Beverly Hills, there are many residents who are struggling to provide for their basic needs, particularly for medical, dental and behavioral healthcare needs.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

Saban Community Clinic respectfully requests a grant of \$50,000 over 12 months from the City of Beverly Hills. The grant will support delivery of medical, dental, behavioral health and specialty care services to Beverly Hills residents. SCC does intend to reapply for future cycles to support the ongoing provision of vital healthcare services.

SCC has a longstanding presence in Los Angeles, and a stated commitment to serving the most vulnerable. SCC's Board of Directors is dedicated to the sustainability and continued success of SCC's health care programs, including for people experiencing homelessness. SCC recognizes the growing population of homeless people in Los Angeles, and the need to provide them with outstanding care. Additionally, SCC's own strong financial viability, combined with its robust fundraising team mean that this program will be sustainable for many years to come.

SCC and its Board of Directors are committed to the long-term sustainability and viability of all its programs and services. SCC actively pursues grants from the federal, state, and local governments, foundations, corporations, individuals, and other sources for operating funds. SCC's designation as a Federally Qualified Health Center (FQHC) also allows it to apply for federal funding to help offset its operational costs and expand its services.

Additionally, Friends of the Saban Community Clinic is a separate nonprofit entity whose sole purpose is to fundraise for SCC. Friends of SCC holds several fundraising events annually that contribute to the sustainability of the Clinic, and it has current reserves of over \$13 million. These investments have provided over \$500,000 in operating support annually to sustain SCC programs. The Board's intention is that these investments exist in perpetuity so that SCC may thrive not just in the present, but well into the future.

Private support from individual donors and corporations is also crucial to ensuring SCC's continuation of quality healthcare to Los Angeles residents. SCC and its Board of Directors will continue to maintain diversified and sustainable revenue sources for the fiscal wellbeing of SCC and the patients we serve. Finally, SCC has solid financial liquidity: its current assets are 2.5 times more than its current liabilities.

SCC respectfully requests this funding to ensure the Clinic can continue providing excellent care to Beverly Hills residents.

6. What percentage of your annual funding would the City's contribution represent?

The City of Beverly Hill's funding would represent less than 1% of SCC's overall revenue for Fiscal Year 2017-18. However, the funding would be a critical component to provide healthcare for Beverly Hills residents.

7. What is the ratio of your organization's administrative operating costs?

Administrative and fundraising costs total 4% of SCC's operating expenses. For every dollar raised, 96 cents goes directly to vital program services. This is an outstanding level of fiscal accountability and demonstrates SCC's commitment to managing donor dollars.



8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
  - b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.
9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

Not applicable.

Submission of the following documents is required:

- ☐ Completed CAGF application,
- ☐ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☐ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)

The City must be named as additionally insured under each policy

Subrogation must be waived for each insurance policy

An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

TAB  
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## APPLICATION SUMMARY FY 2018/19

**Agency:** Step Up on Second

**Requested amount:** \$60,000

**History of City funding:** partner in CLASP Outreach Program from inception in 2007 through present. 2012/13: \$45,000; 2013/14: \$30,000; 2014/15: \$60,000; 2015/16: \$60,000; 2016/17: \$60,000; 2017/18: \$60,000

**Agency description:** Provides permanent supportive housing for individuals affected by severe and persistent mental health issues and young adults who have experienced trauma and are at risk of developing mental health issues, and their families.

**Proposed use of Community Assistance Grant Funds:** This grant augments the City's ongoing contract with Step Up on Second for the CLASP homeless outreach team. With this grant, Step Up will support CLASP and the City of Beverly Hills to link eligible individuals to Los Angeles County's most competitive mental health programs. Step Up will prioritize up to three slots in one of these intensive programs for appropriate and qualified Beverly Hills CLASP referrals. These programs will engage and link individuals who are vulnerable and experiencing chronic homelessness to a multi-disciplinary team (service coordinator, nurse, licensed social worker, and psychiatrist), equipped to address complex case management, health, and psychiatric needs, and housing.

In addition, these funds will also support Step Up staff to act as the City of Beverly Hills' liaison to the Coordinated Entry Systems (CES) in both Service Area 5 and 4. Step Up will ensure individuals who are experiencing homelessness in Beverly Hills and outreached by CLASP, are properly surveyed. The team will use the newest version of the LAHSA VI-SPDAT tool. Responses will be entered into the CES system to ensure these individuals have access to appropriate housing resources.

**Target population/Primary service:** Longtime homeless individuals with a mental illness currently in Beverly Hills.

**Percentage of total program utilized by Beverly Hills residents/community:** 100%

**Quantifiable Services and Measures:** Homelessness has a significant impact in Beverly Hills including utilization of Police, Rangers, Fire/Paramedics, Library and Recreation and Parks staff time. Homelessness affects community sanitation, safety and general quality of life issues for city residents and visitors.

The City of Beverly Hills has limited access to mental health services to assist its unsheltered community members. It must rely on LAC Dept. of Mental Health (DMH) and LAC Dept. of Health Services (DHS) for those services. Step Up is currently the city's designated DMH/DHS contractor that provides needed mental health, physical health and housing resources for the most vulnerable unsheltered persons within the City.

Measures: (1) DMH Integrated System (IS) screening, for mental health services will be provided to 100% of all CLASP clients who present with mental health symptoms or needs.

Those who meet criteria, or need further evaluation will receive outreach and assessment by qualified Step Up staff.

(2) Up to three CLASP clients who have been assessed and meet program criteria will be enrolled in Step Up's intensive service programs

(3) Permanent Supported Housing (PSH) linkage for four BH community members experiencing homelessness

(4) Four of BH members placed in PSH will meet with Life Skills Coordinator every week

(5) 90% of those housed will remain stably housed during reporting period

**Historical Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

Step Up has partnered with the City of Beverly Hills for the past nine years with the CLASP Outreach Program, and had made great strides in addressing homelessness in the City. Since augmenting the CLASP program with CAGF support, Step Up has provided permanent supportive housing to 16 Beverly Hills clients (two are deceased, and 14 remain stably housed).

The end goal of all Step Up's homeless services is permanent supportive housing for individuals experiencing mental health conditions. Residents in permanent supportive housing have an opportunity for member-driven supportive services that include life skills to retain their stable housing, reduce recidivism, address their mental and physical health needs, reduce substance abuse, and help to attain their employment, personal, and/or educational goals. Mutuality, respect and a sense of belonging are key components of Step Up's approach.

**Percentage of annual funding City's contribution represents:** less than 1%

**Ratio of administrative to operating costs:** 14%

**Agency Scope:**

Local ☒ Regional ☒ National ☐ International ☐

**Service Profile:** Needs-based ☒ Quality of life-based ☐ Social Service ☒ Health ☒

Education ☐ Other ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Step Up
ADDRESS:	1328 Second Street, Santa Monica, CA 90401
CONTACT PERSON:	Barbara Bloom, COO
PHONE:	(310) 394-6889 x.1624 M: (310) 901-9146
FAX:	(310) 458-9010
EMAIL:	barbara@stepuponsecond.org / kmartin@stepuponsecond.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3 ☐ We are in a partnership with a 501c.3

☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

Since 2008, Step Up has been funded by the City of Beverly Hills for the CLASP program which supports two full-time Step Up employees in the City to engage and support "unsheltered persons" who are experiencing chronic homelessness and mental health conditions in the City of Beverly Hills. Step Up appreciates this long standing partnership. The CLASP contract provides for Step Up outreach service coordinators to spend 100% of their time within the City of Beverly Hills working with the city's unsheltered population. While their services have had a tremendous impact on the population experiencing chronic homelessness within the city limits over the past 9 years, the team is limited in what they are able to accomplish to achieve permanent housing solutions with their current resources. The proposed CAGF grant will continue to augment the quality and depth of these current services.

The City of Beverly Hills Community Assistance Grant Fund (CAGF) will allow Step Up to continue to support the Beverly Hills CLASP team access resources within Step Up's cache of services for those experiencing homelessness by assisting the CLASP and the City of Beverly Hills to link eligible individuals to Los Angeles County's most competitive mental health programs. These additional services are not currently provided nor funded by any other source. Step Up is a Los Angeles County Department of Mental Health Master Agreement Contractor operating multiple mental health/homeless programs in both SA's 4 and 5, including Full Service Partnership Programs (FSP) and Assisted Outpatient Treatment Programs (AOT). The City of Beverly Hills community members experiencing homelessness within the cities limits are able to access resources in both service areas if eligible through Step Up's contracts with DMH. Funding through CAGF also helps cover the costs of the vehicle used for outreach in the community.

Through this grant, Step Up will prioritize up to 3 slots in one of these intensive programs for appropriate and qualified Beverly Hills CLASP referrals. FSP and AOT programs will engage and link individuals who are vulnerable and experiencing chronic homelessness to a multi-disciplinary team (service coordinator, nurse, licensed social worker, and psychiatrist), equipped to address complex case management, health, and psychiatric needs, and housing. In addition, these funds will also support Step Up staff resources to act as the City of Beverly Hills' liaison to the Coordinated Entry Systems (CES) in both SA 5 and 4. Step Up will ensure those individuals who are experiencing homelessness in Beverly Hills and outreached by CLASP are properly surveyed through the CAGF funding. The team will use the newest version of the LAHSA VI-SPDAT tool. Responses will be entered into the CES system to ensure these individuals have access to and will be appropriately linked to housing resources. Both the DMH and CES systems are extremely complex, but Step Up staff are trained and will provide access and a voice to advocate for specific Beverly Hills clients who are not already a part of that system.

Step Up is an active participant in CES and is highly regarded for successfully housing 791 individuals experiencing chronic homelessness both before the CES was instituted and currently. Step Up program staff attends the CES meetings in their local areas, keep track of clients entered and have access to specialized housing resources due to funding from Departments of Mental Health (DMH) and Health Services (DHS) and Veterans Programs (VASH and SSVF). The Step Up staff will also assist with linking those who eventually enroll in FSP or AOT with access to housing resources outside the CES auspices. Step Up will assist with prioritization and access to wait lists for undesignated project based voucher units at Step Up's Hollywood properties (The Tammy or Michael's Village).

Measurable Outcomes for this award will include:

1. DMH Integrated System (IS) screening, for mental health services will be provided to 100% of all CLASP clients who present with mental health symptoms or needs. Those who meet criteria, or need further evaluation will receive outreach and assessment by qualified Step Up staff.
2. Up to 3 CLASP clients who have been assessed and meet program criteria will be enrolled in Step Up's intensive service programs
3. Permanent Supported Housing (PSH) linkage for 4 BH community members experiencing homelessness
4. 4 of BH members placed in PSH will meet with Life Skills Coordinator every week
5. 90% of those housed will remain stably housed during reporting period

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

These services are critical; not only for the City's most vulnerable community members who are unsheltered and in desperate need of care, but also for the City. Homelessness has a significant impact in the City of Beverly Hills; the high cost of utilization of the City's crisis resources including first responders such as police, paramedics, and parks and recreation staff time. Homelessness affects community sanitation, safety, and general quality of life for all City of Beverly Hills residents and for visitors who come to the City from across the globe. It is clearly documented that the solution to homelessness is housing; specifically permanent supportive housing. Step Up has been able to provide this resource to the City's members who are experiencing homelessness and are the most disabled through its support and grants.

The City of Beverly Hills also has limited access to mental health services to assist its unsheltered community members. It must rely on a LAC Department of Mental Health (LACDMH) directly or contracted agency and LAC Department of Health Services (LACDHS) for those services and supports. Step Up is currently the City of Beverly Hills designated LACDMH and LACDHS contractor that provides these needed mental health, physical health and housing resources for most vulnerable unsheltered persons within the City of Beverly Hills.

This CAGF \$60,000 request will enable Step Up to augment the current CLASP program services with critical services such as:

- Ability to call one of its qualified mental health professionals to make assessments and evaluations for mental health triage and care.
- Augment CLASP clients with access to health care professionals including a nurse and psychiatrist.
- Permanent supportive housing linkage and placement in the CES system and placement for individuals currently experiencing chronic homelessness in the City of Beverly Hills, in addition to managing Service Area 4 CES for Beverly Hills clients.
- Intensive post-housing, member-driven support services that include: intensive case management, life skills development, and post-housing psychiatric support for medication.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

This CAGF grant funding will be 100% utilized for the Beverly Hills community.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

The request is for \$60,000 to ensure the continued access and linkage to ongoing pre and post housing support for those Beverly Hills clients housed. Step Up will likely apply for support in the future.

6. What percentage of your annual funding would the City's contribution represent?

Step Up's current approved operating budget for FY 17-18 is \$18.5 million. This request represents less than 1% of the total budget.

7. What is the ratio of your organization's administrative operating costs?

The ratio of Step Up's administrative operating costs is 14%.

8. Financial Statement: SEE ATTACHED.

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.

9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

Step Up has been honored to have partnered with the City of Beverly Hills for the past nine years with the CLASP Outreach Program. The CLASP team has made great inroads in addressing homelessness in the City of Beverly Hills. Since augmenting the CLASP program with CAGF support, Step Up has provided permanent supportive housing to 16 Beverly Hills CLASP- clients, two are deceased, to date, the other 14 are still stably housed. Clearly, the solution to ending chronic homelessness nationally, as well as in Beverly Hills, lies in providing permanent supportive housing.

Mental health recovery is a journey of healing and transformation enabling a person with mental health conditions to live a productive and meaningful life in a community of his or her choice while striving to achieve his or her full potential. The #1 requested "supportive service" is housing. Housing itself is healthcare. Thus, the end goal of all Step Up's homelessness services is permanent supported housing for individuals experiencing mental health conditions. Residents in permanent housing have an opportunity for member-driven supportive services that include life skills to retain their stable housing, reduce recidivism, address their mental and physical health needs, reduce substance abuse, and help to attain their employment, personal, and/or educational goals. Mutuality, respect, and a sense of belonging are key components of Step Up's approach. Step Up is enthusiastic at the prospect of continuing to augment CLASP services through this CAGF grant award. Together through this partnership, recovery is possible!

Submission of the following documents is required:

- ☐ Completed CAGF application,
- ☐ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☐ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☐ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City



TAB<sup>B</sup><sub>18</sub>

## APPLICATION SUMMARY FY 2018/19

**Agency:** The Maple Counseling Center (TMCC)

**Requested amount:** \$180,000

**History of City funding:** 1984-89: \$70,000 annually; 1990-91: \$100,000 (*extra \$30,000 as one-time contribution to assist in relocation expenses*); 1992-93: \$100,000 annually; 1994: \$125,000 (*extra \$25,000 as one-time increase to aid in debt recovery*); 1995-96: \$125,000 annually; 1997-2002: \$150,000 annually; 2003-6: \$165,000 annually; 2007: \$165,000; 2008/9: \$170,000; 2009/10: \$86,499; 2010/11: \$75,000; 2011/12: \$75,000; 2012/13: \$75,000; 2013/14: \$75,000; 2014/2015: \$100,000; 2015/16: \$120,500; 2016/17: \$140,500; 2017-18: \$150,000

**Agency description:** Since 1972, TMCC has been the single low-fee community mental health resource in the City of Beverly Hills. TMCC serves the Beverly Hills community by providing comprehensive mental health services to all who need them. This includes residents, city and school district employees, and employers/employee of local businesses. All fees for TMCC's programs are assessed on a sliding scale, and no one is ever turned away for lack of funds.

**Proposed use of Community Assistance Grant Funds:** Funds requested continue TMCC's existing menu of services for Beverly Hills community members. The request for the additional funding of \$30,000 for FY 2018-19 will help support the following service needs:

1. To hold two or three community forums, open to the general Beverly Hills community to learn about newsworthy topics that affect mental health (e.g. workplace gender issues) (\$5,000);
2. Develop a pilot program to address the needs of frail elderly adults by making home mental health services available for Beverly Hills residents referred by the City of Beverly Hills, Cedars Sinai and HUD. The costs associated with the initial pilot program will include program development, outreach to key referral sources and the incorporation of additional necessary training for MSW and MFT interns. During the pilot year, six to ten clients will receive services. The additional costs are necessary and will pay for approximately ten clinical supervision hours weekly (\$20,000);
3. Supporting the expansion of TMCC's regional efforts by building upon its successful offsite children's services and meet the mental health challenges of adults who needs are not currently being met (\$5,000).

**Target population/Primary service:** LA County and the Beverly Hills community/mental health services and programs. The primary population served is adults ages 25-62 who make up 80% of TMCC's clients.

**Percentage of total program utilized by Beverly Hills residents/community:** 13% of TMCC's counseling clients at their headquarters office, identified as Beverly Hills residents or employees of Beverly Hills businesses, and 50% of TMCC's total clients, including students at the schools, are Beverly Hills residents or employees in the City.

**Quantifiable Services and Measures:** During 2017, members of the Beverly Hills community comprised over 50% of the Center's clients. TMCC attributes this high percentage to the number of students receiving services through BHUSD. Of the 1,920 of TMCC's counseling clients who received services at the Center's headquarter offices during the calendar year,

13% identified as Beverly Hills residents or employees of Beverly Hills businesses. Eleven Beverly Hills residents utilized TMCC's psychiatric services, and three were older adults requiring a lower fee than the \$250 charged by TMCC.

The BHUSD (\$50,000) contract with TMCC accomplished the following: In 2017, the Community Circle Program at Beverly Hills High School and Moreno Continuation School served over 500 students, including ongoing counseling and drop-in sessions. Over 2,000 counseling sessions were provided at both schools combined. In 2017, the Program served 1,300 K-8 students with over 1,400 classroom sessions provided.

During 2017, the two lunchtime programs were held for City of Beverly Hills employees; "Living Far Away During a Natural Disaster: Coping Together" and "Stress Reduction and Mindfulness." City, school district employees, and employees of local businesses are not required to disclose their employment information when receiving services at TMCC.

**Historical Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

The primary population served by TMCC is adults between the age of 25 and 62, who in 2017 made up 78% of the Center's clients, with the most highly utilized service at TMCC being individual therapy. In 2017, 71% of the clients had an annual income of \$30,000 or less, with 52% of the clients having incomes under \$20,000 per year, and 45% of the clients having an income of \$15,000 per year.

The Center's Older Adult Counseling Program (OACP) enhances quality of life for those 55 years of age or older living in Los Angeles County, who struggle with depression, isolation, and a range of aging and related challenges. Older adults seeking counseling at TMCC receive services through the "older adults track" made of both interns and older adult paraprofessionals seeking to gain expertise in working with this population. The OACP also provides therapy to couples along with support groups to meet their needs, in addition to home-based services when needed due to a client's particular circumstance. Outreach to older adults in the Beverly Hills community is ongoing.

TMCC provides a full range of services to infants, children and adolescents through its Child and Family Program. In addition, the Center's intern training program offers specialty tracks for interns to develop expertise in working with young children (ages 0-10) and older children and adolescents, with particular emphasis on school based services.

**Percentage of annual funding City's contribution represents:** 11% (includes CAGF contract of \$180,000 in addition to the City of Beverly Hills Human Resources Department Employee Assistance Program contract of \$35,000).

**Ratio of administrative to operating costs:** 20%

**Service Profile:** Needs-based ☒ Quality of life-based ☐ Social Service ☒

Health ☐ Education ☒ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



**CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT APPLICATION  
FY 2018-2019**

AGENCY/PROJECT NAME: **The Maple Counseling Center – General and Emergency Services**

ADDRESS: 9107 Wilshire Blvd, Lower Level, Beverly Hills CA 90210

CONTACT PERSON: Marcy Kaplan, MSW, CEO

PHONE NUMBER: (310) 271-9999 x 219

FAX NUMBER: (310) 247-4910

EMAIL ADDRESS: mkaplan@tmcc.org

*Please type your answers to the following questions:*

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3                      ☒ We are in a partnership with a 501c.3  
☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.
2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

The Maple Counseling Center (TMCC) continues to be a critically needed resource for people who live throughout the greater Los Angeles County area. Individuals can turn to TMCC when they are in need of low fee mental health services. TMCC, in existence since 1972, provides counseling services to residents of Beverly Hills and in surrounding communities. TMCC remains one of the few alternatives available where low-fee counseling services are available. Clients pay a fee based on their income, and no one is turned away. TMCC, also known as the 'Center,' is an outgrowth of concerned parents in the Beverly Hills community, and the organization has served its residents, employees of the City and the Beverly Hills Unified School District, in addition to individuals who are employed by Beverly Hills based businesses. City and school district employees pay a flat fee for services. To this day, TMCC is the only resource for low-fee counseling in Beverly Hills and the surrounding area.

Counseling provided by therapists in private practice, referred to as retail therapy, is quite costly and too expensive for many people. Services can easily average \$800 per month. In the absence of available services where people can pay what they can afford, many will go without the help that they need. For some individuals, the onset of a more serious mental illness may result from not receiving care early on, sometimes leading to the potential need for costly hospitalization.

The uncertainty of evolving changes in health care and with insurance coverage make it unclear as to what coverage will be available. TMCC ensures that clients can receive counseling services for as long as needed, as frequently as desired, utilizing multiple services concurrently (i.e. group, family, couple's therapy) to achieve mental health stability.

The Maple Counseling Center also provides low-fee psychiatry services (medication evaluation and follow up) to those who are unable to afford the minimum therapy charge of \$450 hourly for this service. This presents an important low-fee option, particularly necessary for older adults who often lack the financial resources to utilize this service to determine whether medication may be an appropriate adjunct to counseling.

For the past 46 years, TMCC has been a sought-after resource for people of all ages who referred by mental health professionals, local businesses, and by word of mouth.

Together, TMCC's programs and intern training have a locally and nationally known reputation for quality and excellence. For the current 2018-2019 academic year, there are 83 interns working on licensure hours at TMCC, earning PhD, PsyD, LCSW, and LMFT licenses, along with four older adult peer counselors.

The principal functions of TMCC are to:

- Meet the mental health/counseling needs of people of all ages, with specialized programs offered to couples, families, and older adults.
- Make medication evaluation available and affordable for clients to augment their counseling.
- Offer emergency intervention programs, including services that will support to Beverly Hills residents, businesses, and City 'first responder' personnel following a tragic event.
- Provide municipal employees with ongoing support and educational programs.
- Provide counseling and other support services for students in our local schools
- Implement programs to respond to community needs, particularly in underserved communities throughout Los Angeles County lacking resources.
- Serve as a training program for graduate students in graduate level training programs and working toward licensure in the fields of psychology, social work, and marriage and family therapy.

The primary population served by TMCC is adults between the ages of 25 and 62; in 2017 made up 78% of the Center's headquarters counseling clients. The most utilized service at TMCC is individual therapy. TMCC serves a primarily low-income population. In 2017, 71% of the clients had an annual income of \$30,000 or less, with 52% of the clients having incomes under \$20,000 a year, and 45% of the clients having incomes under \$15,000 a year.

The Center's Older Adult Counseling Program (OACP) enhances the quality of life for those 55 and older living in Los Angeles County, who struggle with a range of age related mental and physical challenges which may include; depression, loss and lack of independence. Older adults seeking counseling at TMCC receive services through the older adults track, where counseling services are provided by both interns seeking licensure and older adult paraprofessionals. The OACP also meets the needs of couples, and provides support groups where people can share common experiences and receive feedback from their peers. Outreach to older adults in the Beverly Hills community is ongoing and takes place over the course of the year at community events and health fairs.

TMCC provides a full range of services to infants, children, and adolescents through its Child and Family Program. The Center's intern training program offers specialty tracks for interns to develop expertise in working with young children (ages 0-10) and older children and adolescents, with emphasis on school-based services. Beginning in 2015, responding to areas of Los Angeles county lacking mental health/early intervention services and specialized expertise, TMCC is now collaborating with the Salvation Army and Alexandria House to meet these needs, and 900 service contacts occurred serving both children and adults at these two agencies combined during 2017. All clients served at these organizations are living below the federal poverty level

The Center's school based services, offered within the Beverly Hills Unified School District (BHUSD), include the Community Circle Program and individual and group counseling at Beverly Hills High School and the Moreno Continuation School. The counseling service provided by TMCC interns at Beverly Hills High School and the Moreno Continuation School served over 500 students in 2017. This included ongoing counseling and a high number of drop-in sessions. Over 2,000 counseling sessions were provided at both high schools combined.

The Center's long- standing Community Circle Program offered at all the BHUSD elementary schools, has students engage in dialogue and problem solving with their fellow classmates facilitated by a volunteer Community Circle Leader. The goal of Community Circle is to build character, self-worth and responsibility. For the current 2017-18 school year, 32 classrooms in the BHUSD participate each week. In 2017, the Community Circle Program served a total of 1,300 K-8 students with over 1,400 classroom sessions provided.

TMCC collaborates with all the BHUSD schools to provide the necessary support following school sponsored educational programs addressing bullying, suicide prevention or substance use. For the current school year, Community Circle Leaders and ACT program interns are participating in an anti-bullying program at Beverly Vista school by facilitating group discussions. This year's theme is focusing on how one's own behavior may cause negative and painful consequences for others.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

The 2016 California Health Interview Survey results for Los Angeles County show that of the 7,625,000 adults surveyed, 9.7% or 740,000 adults responded yes when asked, "Likely has had serious psychological distress last year."

The same survey posed the question, "Number of days unable to work due to mental problems" to 740,000 adults with the following responses:

Able to work all days	22.4%
Unable to work 7 days or less	16.1%
Unable to work 8-30 days	21.1%
Unable to work 31 days to 3 months	10.1%
Unable to work more than 3 months	30.3%

This is of significance because of 740,000 adults living in Los Angeles County, 575,000 suffered from mental problems that interfered with their ability to work, which is extremely costly for these individuals, their families, and the community. It is essential that mental health intervention be provided promptly to avoid the ongoing psychological distress that impairs one's ability to be a productive citizen.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

During 2017, members of the Beverly Hills community comprised over 50% of the Center's total clients from all programs combined, the high percentage was attributed to the number of students receiving services within the BHUSD. Of the 1,920 of TMCC's counseling clients who received services at the Center's headquarters office during this calendar year, 13% identified as residents of Beverly Hills or employees of Beverly Hills businesses. Eleven Beverly Hills residents used the psychiatry services, and of this number three were older adults requiring a lower fee than the \$250 charged by TMCC.

Municipal employees and individuals employed by local businesses are not required to disclose their employment information when receiving services and many would willingly give up the reduced fee to protect their anonymity.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

The Center is requesting that the City of Beverly Hills Community Assistance Program provide funding of \$180,000, an increase of \$30,000 over the 2017-2018 fiscal year.

The additional funding requested for the upcoming year will help support the following service needs:

- 1) Hold two or three community forums that will be open to the general Beverly Hills Community, with the goal of supporting these constituents. These forums will offer opportunities to learn about newsworthy topics that affect mental health (such as workplace gender issues) (\$5,000)
- 2) Develop a pilot program to address the needs of frail elderly by making home mental services available for Beverly Hills residents referred by the City of Beverly Hills, Cedars-Sinai & HUD. (\$20,000). The costs associated with the initial pilot year will include program development, outreach to key referral sources, and the incorporation of additional necessary training for MSW and MFT interns. During the pilot year, between 6-10 clients will receive services. The additional costs are necessary and will pay for approximately 10 clinical supervision hours weekly.
- 3) Supporting the expansion of TMCC's regional efforts by building upon its successful offsite children's services and meet the mental health challenges of adults whose needs are not currently being addressed (\$5,000).

We plan to reapply during future cycles to enable our organization to continue offering programs to the Beverly Hills community.

6. What percentage of your annual funding would the City's contribution request?

The total percentage of TMCC's funding that would come from the City of Beverly Hills Community Assistance Funding in 2018-2019 will be 11% (includes \$180,000 requested in this application in addition to \$35,000 from the City of Beverly Hills Department of Human Resources).

7. What is the ratio of your organization's administrative operating costs to total gross operating budget?

2018 Administrative Operating Cost \$369,625.36/2018 Gross Operation budget 1,860,432 = 20%

8. Financial Statement:

- a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return. (included)
- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant. (included)

The 2016 audit is included. The 2017 independent audit will be submitted upon completion by May of 2018 and will be submitted to the Lon V. Smith Foundation at that time.

9. Provide any additional information that may be useful in evaluating your request.

During the fall of 2017, TMCC provided a 'drop in program' for anyone in the community who wished to discuss the Las Vegas tragedy. This was well received by the community members who participated and by TMCC counselors who benefited from an opportunity to learn about the consequences of trauma.

During 2017, two lunch time programs were held for employees of the City of Beverly Hills; 'Living Far Away During a Natural Disaster: Coping Together' and 'Stress Reduction and Mindfulness.'



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## APPLICATION SUMMARY FY 2018/19

**Agency:** Theatre 40

**Requested amount:** \$74,000

**History of City funding:** 2006-07: \$1,000; 2007-08: \$3000; 2008-09: \$3,100 in grant funding and a separate request for \$10,000 from the General Fund for theater seat replacement; 2017-18: \$20,000

**Agency description:** Theatre 40 is a professional producing theatre company that has been operating in Beverly Hills for over 52 years. Theatre 40 has produced approximately 456 professional theater productions, and has been awarded over 360 drama critics' awards for excellence in theatre.

**Proposed use of Community Assistance Grant Funds:** Theatre 40 proposes to use the funding in the following way for FY 2018-19: 1. \$35,000 to support six Theatre 40 productions annually; 2. \$16,000 to support the Adult Education Monday Night Theatre Appreciation Class (three trimesters annually); 3. \$23,000 to support Theatre 40's production of *The Manor-Murder and Madness at Greystone*, for the 17<sup>th</sup> year of the production.

**Target population/Primary service:** Individuals interested in attending theater performances as well as adults who attend Theatre 40's Monday night theatre classes.

**Percentage of total program utilized by Beverly Hills residents/community:**

Approximately 78% of Theatre 40's annual season subscribers are Beverly Hills residents. Theatre 40 works with BHUSD's Adult Education Program to hold an adult theater class every Monday night throughout the school year, and approximately 90% of the students are Beverly Hills residents. Over 50% of the attendees of *The Manor* are Beverly Hills residents.

**Quantifiable Services and Measures:** Will be able to quantify and measure impact based on the Adult Education program and audience numbers.

**Historical Performance:**

FY 17/18: (Q1 & Q2) ☒ Satisfactory ☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

Please note that Theatre 40 currently receives in-kind funding of approximately \$85,000 at Greystone Manor for their production of *The Manor – Murder and Madness at Greystone*. This production has been running at Greystone for the past 15 years. About six years ago, the City began charging for the use of the Manor venue, however, Theatre 40 has never been charged for rental fees, Ranger fees, nor any other applicable fees for their use of Greystone.

**Percentage of annual funding City's contribution represents:** Approximately 19%.

**Ratio of administrative to operating costs:** Theatre 40's approximate annual budget is \$383,000 and their administrative costs are approximately \$297,803 (77%).

**Service Profile:** Needs-based ☐ Quality of life-based ☐ Social Service ☐

Health ☐ Education ☐ Cultural ☒ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



**CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT APPLICATION  
FY 2018-2019**

AGENCY/PROJECT NAME: Theatre 40

ADDRESS: P.O. Box 5401 – Beverly Hills, Ca. 90210

CONTACT PERSON: David Hunt Stafford – Artistic & Managing Director

PHONE: 323-666-5500

FAX: 323-666-5500 (same # please call first before faxing)

EMAIL: davidhuntstafford@sbcglobal.net

*Please type your answers to the following questions:*

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
Please provide documentation.

~ ~ Theatre 40 is a 501 c. 3 non-profit organization as well as a 509 a 2 registered charity with the IRS and U.S. Dept. of the Treasury – please see attached documentation. Theatre 40 is not in partnership with any other organization.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

~ ~ The services Theatre 40 provides the Beverly Hills community are in fact several and very important ones. There are multiple aspects to the answer to this question.

**2a.)** The services we propose to provide are in fact, already being provided, and have been being providing for over 52 years. Those services are the producing of high quality professional theater productions for the enjoyment of the community.

Primarily, Theatre 40 is a professional, producing theatre company and has, over the fifty two years we have been operating in Beverly Hills, produced approximately 456 professional theatre productions. Theatre 40 has been awarded over 360 drama critic's awards for excellence in theatre over the years.

During our current 2017/2018 season Theatre 40 won eleven more awards for acting and for excellence in our productions of *Late Company*, *Sherlock Holmes and the Case of the Jersey Lill* as well as for *Sequence and Vino Veritas. Nazi Hunter- Simon Wiesenthal* which started at Theatre 40 then played 170 performances off Broadway in N.Y. and then played at The Wallis won the Los Angeles Drama Critic's Circle award for best solo performance among all production in all of Los Angeles.

The plays we produce are both classic plays and new plays, both comedies and dramas. The "services" we provide are the putting forth of these professional theatre productions for the community's consumption and enjoyment as well as the cultural rewards the theater has to offer. Over 78% of the loyal Theatre 40 audience is from the Beverly Hills community and our base of subscribers have been re-subscribing for over 30 and some for as many as 35 years. This type of long-term loyalty to the work that Theatre 40 does is a testament to not only the quality of our productions but also to the need the community has to attend professional theatre productions affordably, conveniently and locally. Theatre 40 is the only professional producing theater company in Beverly Hills. The Wallis offers a wide variety of programming. Theatre 40 only produces professional theater productions.

**2b.)** Theatre 40, for over 44 years, has worked very closely with the officials at the Beverly Hills Unified School District teaching classes, on a 100% volunteer basis, for the Adult Education Program. Theatre 40 has, for over 44 years, free to the District, taught a Theatre Appreciation Class every Monday night during the school year. This class involves professional actors rehearsing on their own time and preparing a full-length play to read and present to the class each week. The BHUSD receives money from those adults that enroll in the class but Theatre 40 receives no financial compensation and the actors involved perform for free. Again, many of these adult students (most are Beverly Hills senior citizens) have re-enrolled in the class for many years. The adult students enjoy the play readings, the discussions, the actors and the professional presentations that Theatre 40 does each week because they receive cultural as well as educational rewards and intellectual stimulation from the class. Several years ago the BHUSD Board of Education decided to end all the Adult Education classes as a cost cutting measure. Theatre 40 went to the BOE and said "there is no need to do away with Theatre 40's Monday Night Theatre Appreciation Class, because it costs the District nothing and Theatre 40 collects the enrollment dollars from the adult students and delivers that money to the District office". Theatre 40's Monday Night Theatre Appreciation Class creates a small revenue for the District and again we teach the class on a 100% basis. So the class continues, over 44 years of volunteer teaching. We propose to continue providing these services to the BHUSD and the Beverly Hills community.

2c.) Theatre 40 has over the last 16 years produced an extraordinary theater production that is performed inside Greystone Mansion called *The Manor – Murder and Madness at Greystone*. This remarkable and critically acclaimed production tells the story of a fictional "Doheny" family and is based on actual event that took place inside Greystone when the Dohenys built and lived at Greystone in the late 1920's. The City Council in 2001 allowed Theatre 40 to use the Greystone Estate to produce this play and it's popularity has been wonderful for Theatre 40 and for The City and for the Mansion. *The Manor* is the longest running production in Los Angeles. It is a partnership that has brought literally countless visitors to Greystone. The City in 2001 gave permission to perform *The Manor* 3 times and now it is 16 years later and almost 300 performances of *The Manor* have been enjoyed by visitors from all over Southern California. We propose to continue providing these services to the Beverly Hills community.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

~ ~ We feel these services – professional theatre productions, both at Theatre 40 on the campus of the BHHS as well as at Greystone Estate and educational theatre programs for the adults of the community are critical to the Beverly Hills community in the sense that "the theatre arts" certainly enhances the quality of life. Great professional theatre productions are an important part of every community's cultural landscape. We feel that the residents of a community that is void of professional theatre productions will seek those experiences in other communities that do offer them. If Beverly Hills has no theatre, then the residents of Beverly Hills will go elsewhere for the theatre experience. As we know, many B.H. residents already do go to The Taper, The Geffen, The Odyssey and other theatres in Southern California. With Theatre 40 they can have those theater experiences locally and conveniently and very affordably I might add. We feel it is critical that a city with the prominence of Beverly Hills have a vibrant and exciting professional theatre company that is part of the qualities the City has to offer. By the same token the educational program for the Adult students is also essential. Theatre 40's Monday Night Theatre Appreciation Class generates enthusiasm and interest in the theater as well as promotes mental awareness and alertness – it stimulates and invigorates the adult students as well as provides entertainment and enjoyment. Offering these services and having them available is critical for the Beverly Hills community. We feel these services do indeed enhance the quality of life as well as the quality of the education being offered in the BHUSD.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

~ ~ In regard to Theatre 40's professional theatre productions, which perform all throughout the year on a late July to late May annual theatrical season calendar (six

professional productions throughout the year) approximately 78% of the annual season subscribers are Beverly Hills residents. It is difficult to state how many other "theatre goers" who are attracted to Theatre 40 by display advertising, friends of the productions and "word of mouth" are in fact Beverly Hills residents. I would estimate of the "walk up ticket buyers" approximately 57% are from the Beverly Hills community. With funding from the City I am confident we can grow this number.

In terms of Theatre 40's Adult Education Monday Night Theatre Appreciation class – approximately 90% of the enrolled adult students are from the Beverly Hills community. With funding from the City I believe we can grow the number of attendees in this long-standing Adult Education Theatre Appreciation class.

In terms of Theatre 40's production of *The Manor at Greystone Estate* well over 50% of the attendees are from the Beverly Hills Community. The other attendees are from all over Southern California. Bus loads of audience members come from San Diego on a regular basis to see the production and enjoy the Estate.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

The amount being requested is \$74,000 - to support each of the three services we provide the Beverly Hills community.

~ ~ \$35,000 to support the Theatre 40 professional theatre productions – six productions annually.

~ ~ \$16,000 to support the Adult Education Monday Night Theatre Appreciation Class – three trimesters annually. 24 professional play readings in the series, annually. Report on Fall 2017 Semester of play readings included for your review.

~ ~ \$23,000 to support the Theatre 40 production of *The Manor – Murder and Madness at Greystone*. 2019 will be the 17<sup>th</sup> year of *The Manor*.

Yes, we would plan to reapply for additional funding during future funding cycles.

6. What percentage of your annual funding would the City's contribution represent?

~ ~ The \$74,000 Theatre 40 is requesting from The City would represent approximately 19% of Theatre 40's annual funding. Theatre 40 operates on approximately \$383,000 per year. Our annual income/funding depends on the number of season ticket holders we get when our annual subscription drive is launched in the Spring of every year. Theatre 40 depends heavily upon the generosity of private donors and contributions from loyal supporters.

7. What is the ratio of your organization's administrative:operating costs?  
~ ~ With an annual budget of approximately \$383,000, the administrative costs are approximately \$297,803. There is only 1 employee of the corporation and a large number of independent contractors that work and are paid for their services to support Theatre 40 administratively. There are approximately 35 independent contractors who work for the corporation and their total remuneration is \$84,406.00 for this past season. They perform a variety of services including costume designer, theatre maintenance, set construction, publicity, lighting technicians, sound designers and graphic designers among many others. The remainder of the annual budget is carefully budgeted and allocated to the operating of the theater, the productions and the educational program we sustain.

8. Financial Statement:

For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return.

~ ~ Please see attached 2016 form 990 & tax return

9. Provide any additional information that may be useful in evaluating your proposal.  
~ ~ Please see attached Theatre 40 Season brochures (2 brochures)  
~ ~ Reviews and flyers from recent Theatre 40 productions  
~ ~ Review and flyer from the recent production of *The Manor* at Greystone Estate  
~ ~ Report on the Fall semester of the BHUSD Adult Education Theatre Appreciation Seminars

Submission of the following documents is required:

- ~ Completed CAGF application – **included**
- ~ Documentation of 501 c. 3 status – **included**
- ~ Copy of most recent Form 990 – **included**
- ~ Copies of any Charitable Solicitations Permit that have been obtained from the City of Beverly Hills – **not applicable – no permits obtained**

**Please note that insurance requirements have changed for FY 2018-19.**

Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy.
- Subrogation must be waived for each insurance policy.

- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City.

**All insurance coverage requirements have been met and submitted to The City and are already on file with The City.**



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## APPLICATION SUMMARY FY 2018/19

**Agency:** Wallis Annenberg Center for the Performing Arts

**Requested amount:** \$10,000

**History of City funding:** 2017-18: \$10,000

**Agency description:** Located in Beverly Hills, the Wallis Annenberg Center for the Performing Arts brings audiences world-class theater, dance and music. Since opening their doors to the public in 2013, the Wallis has established itself as a major cultural resource and civic hub for the Beverly Hills community, drawing over 40,000 paid audience members plus over 10,000 additional adult and youth students, and other visitors annually.

**Proposed use of Community Assistance Grant Funds:** The Wallis requests support for their Community and Outreach Programs, which are part of GRow @ The Wallis, the organization's space for education. Through GRow, the Wallis connects audiences with the very best in the performing arts; uses the power of the arts to build community and to address pressing social issues; and responds to critical needs in the greater community through arts leadership, collaboration and partnership. The community partnerships that the Wallis offers through GRow include free and low-cost opportunities that serve the Beverly Hills and Greater LA communities, and feature opportunities for all ages (young children through older adults) with offerings for special groups including toddlers, seniors, families, individuals with autism and individuals with Parkinson's Disease. GRow serves the community through the following programs: the School Partners Program, Dance Sundays, Programs for youth and adults with Autism, the Student Art Reporters program and Invertigo Dance Theatre Partnership, featuring the Dancing through Parkinson's class.

**Target population/Primary service:** Community members of all ages.

**Percentage of total program utilized by Beverly Hills community:** Community programs at the Wallis serve more than 10,000 individuals, and Beverly Hills community members represent over 1,500 of the individuals, including 1,300 BHUSD students. In addition, Beverly Hills residents represent 33% of the 50,000+ paid audience members who attend performances at the Wallis.

**Quantifiable Services and Measures:** Will be able to quantify and measure impact based on community participation numbers.

**Historical Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

The Wallis' community programs provide access to the arts for individuals who may have previously had limited local opportunities to engage as audience members as well as students. These programs enhance the quality of life of participants, and contribute and enhance the community. The programming also provides ongoing arts education and arts engagement opportunities for Beverly Hills students (pre-K through twelfth grade). Many of the community programs are free or low-cost.

**Percentage of annual funding City's contribution represents:** The City's contribution of \$10,000 would represent approximately 1% of the Wallis' total annual contributed and earned income.

**Ratio of administrative to operating costs:** Administrative expenses represent approximately 10% of the total operating budget.

**Service Profile:** Needs-based ☐ Quality of life-based ☐ Social Service ☐  
Health ☐ Education ☐ Cultural ☒ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Wallis Annenberg Center for the Performing Arts
ADDRESS:	9390 N. Santa Monica Blvd., Beverly Hills, CA 90210
CONTACT PERSON:	Debra Bronow, Director of Advancement
PHONE:	(310) 246-3800
FAX:	(310) 557-9827
EMAIL:	dbronow@thewallis.org

Please type your answers to the following questions:

**1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?**

- ☒ We are a 501c.3      ☐ We are in a partnership with a 501c.3
- ☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

**2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?**

Since opening its doors to the public in 2013-14, The Wallis has established itself as a major cultural resource and civic hub for the Beverly Hills community, drawing more than 50,000 paid audience members plus as many as 10,000 students (both youth and adult), community members, and visitors annually. Beverly Hills residents comprise a significant portion of our audience, as well as nearly two-thirds of our board or directors. In addition to providing unique and valuable services for Beverly Hills residents, The Wallis is an economic stimulus that draws newcomers from throughout the Greater Los Angeles Area to the City. The Wallis is a civic and cultural landmark that is treasured by the Southern California community and respected by the national and international arts communities.

The Wallis respectfully requests a renewed grant of \$10,000 in support of our Community and Outreach Programs that serve as many as 10,000 individuals total each year, including more than 1,500 Beverly Hills youth and adults. These programs enrich the lives of local residents, provide an economic stimulus for local

restaurants, shops and other businesses, and enable Beverly Hills to give back in service to the broader community.

Our community and outreach programs are part of GRoW @ The Wallis, a gift of Gregory and Regina Weingarten and The Annenberg Foundation, which is our space for education. Arts learning is integral to all that we do at The Wallis and vital to healthy communities. The community programs we offer through GRoW:

- Include free and low-cost opportunities that serve the Beverly Hills and Greater Los Angeles Area communities.
- Are created, curated and taught by world-class artists and offered in a state-of-the-art venue.
- Feature opportunities for all ages, from very young children through older adults, with offerings for special groups including children and families, underserved youth, people with autism, and people with Parkinson's Disease.

A grant from the Cultural Grant Program will help us serve Beverly Hills and the community at large through the following GRoW @ The Wallis initiatives.

#### **School Partners Program**

The Wallis launched its School Partners Program in 2015-16, under Director of Education Mark Slavkin. Our partnership model provides multiple opportunities for students, teachers, and families to experience performances on our stages and receive support on their campuses. These partnerships serve as a catalyst for helping schools deepen their own commitment to arts learning.

The program serves more than 5,500 prekindergarten through twelfth grade students each year through the following activities:

- Special weekday matinee performances of our mainstage theater, music and dance productions, exclusively for student audiences;
- Bus transportation to and from The Wallis (schools pay for none, some, or all of the cost of transportation, depending on need);
- In-school workshops led by expert Wallis teaching artists and designed to meet the needs of each individual classroom;
- Professional development opportunities for teachers, including a workshop prior to each matinee that gives teachers tools to prepare their students for the performance as well as general arts integration strategies to use in their classrooms;
- Additional arts enrichment activities throughout the year, including an annual Careers-In-The-Arts Day at The Wallis.

This year, students have attended performances ranging from a concert by the acclaimed string ensemble Harlem Quartet, to a fascinating cinematic shadow play titled *Feathers of Fire: A Persian Epic*, to a performance by LA-Based Lula Washington Dance Theatre celebrating the legacy of Dr. Martin Luther King Jr. The diversity and artistic caliber of the performances selected as student matinees set the School Partners Program apart from other arts engagement experiences. We provide students and teachers opportunities to interact with artists whenever possible, such as this season when choreographer Lula Washington herself visited one of our schools.

Through the School Partners Program, The Wallis serves students from more than 40 schools throughout the Greater Los Angeles Area, including more than 1,300 students from Beverly Hills Public Schools – Beverly Hills High School, Beverly Vista, El Rodeo, Hawthorne, and Horace Mann. These students enjoy a deep and enriching year-round experience, with each school attending multiple student matinees and receiving unique art education opportunities on their campuses, led by expert Wallis teaching artists.

The Wallis believes everyone deserves access to outstanding arts programs. Each year, the School Partners Program selects up to ten LA County schools in at-risk and low-income communities as Focus Schools. These schools receive immersive, yearlong arts education opportunities that helps level the playing field between schools and districts that are reinvesting into the arts and those that still have very limited resources. Through Focus Schools, The Wallis and Beverly Hills share an invaluable cultural resource with our greater community.

Schools contribute to the cost of participation in the School Partners Program, in an effort to encourage schools to place a higher value on arts education.

### **Dance Sundays**

Dance Sundays – a series of ten free, outdoor dance classes on our promenade, led by Debbie Allen and expert teachers from her Debbie Allen Dance Academy – is one of the most exhilarating and prominent public cultural events in the City of Beverly Hills, drawing more than 1,000 participants annually. Launched as Salsa Sundays in 2015, these classes became so popular that we expanded them to free Dance Sundays last season, featuring a range of dance styles such as salsa, African, hip hop, and tap.

On select dates we host additional free activities that transform Dance Sundays into larger cultural happenings. We opened our 2017-18 Season with an invigorating dance class taught by Debbie Allen, which was followed by a performance for children and families by improv troupe the Story Pirates and an outdoor concert by local band Urban Renewal Project. For the concert, we received a special grant from the Los Angeles County Arts Commission to fund the musicians' fees. In January 2018, we celebrated the new year with a Dance Sunday followed by a marionette performance of *Aladdin* by nationally-beloved Steven's Puppets.

Dance Sundays welcomes a broad group of participants including Beverly Hills residents, employees of local businesses, and people from outside the City who are drawn to this unique program. The revitalizing, engaging nature of the Dance Sundays program prompts participants to patronize Beverly Hills restaurants and businesses following the class, and therefore the program provides an economic stimulus and introduces a new demographic to our local businesses.

### **Beverly Hills High School Dance Company Partnership**

The Wallis has been so pleased to launch a new partnership with Beverly Hills High School Dance Company. In January 2018, we hosted three performances of their annual dance concert in our Bram Goldsmith Theater. Performing at this world-class, professional venue was a thrilling and memorable opportunity for the young dancers and the event introduced many Beverly Hills families to The Wallis for the first time.

### **Programs for Youth and Adults with Autism**

The Wallis partners with The Miracle Project to provide theater programs for young people with autism and their typical peers. We offer ongoing, rotating courses, like Triple Threat, a course

that trains students in singing, dancing and acting, and a twice-yearly original musical production, which is based on the students' real life experiences. Students rehearse weekly and the course culminates in a public performance in our Lovelace Studio Theater. The opportunity to perform on a professional stage inspires these young people to "dream big" – a message youth with autism do not always receive. The experience can be life changing for participants: as a stellar example, Coby Bird, an alumnus of our courses with The Miracle Project, recently starred in an episode of the hit television show *The Good Doctor*. We currently have three Beverly Hills students enrolled in the program, along with youth from throughout LA County.

The Wallis has recognized the importance of creating opportunities for individuals with autism to participate in the performing arts since our inception. Our multi-function Quiet Room in the Goldsmith Theater can be used for audience members who need to make noise or move during a performance. This unique accessibility feature makes attendance possible for individuals with autism as well as a broad range of personal conditions and situations.

#### **Invertigo Dance Theatre Partnership**

We offer ongoing dance classes in partnership with LA-based Invertigo Dance Theatre, whose mission is to create connections and community through dance, storytelling, theatre and music. Through this partnership we offer our weekly Dancing Through Parkinson's class, taught by experienced professional dancers and designed to encourage joy, strength, community, stability, mental clarity and creativity for Parkinson's disease patients and their caregivers. In lieu of tuition, students may make a small donation. The Wallis has the unique resources and physical space to offer this course to the target demographic – a group that benefits greatly from participation in the arts and engaging with others facing similar issues. Of the 46 students who have enrolled over the past two years, 17 are Beverly Hills residents.

#### **Student Arts Reporters**

Starting in the 2016-17 season, we have drawn a diverse group of high school students together for our Student Arts Reporter program, a partnership with the Los Angeles Drama Critics Circle. Workshops with professional critics give students an understanding of what it takes to write an effective review. The program gives participants unique opportunities to interact with world-class artists and arts professionals. For example, this fall students attended a performance by acclaimed tap dance company Dorrance Dance, and then had the opportunity to interview choreographer Michelle Dorrance in person. Students submitted their reviews, which received feedback from the professional critics. Reviews are posted on The Wallis's website. Over the past two years, seven of our reporters have been Beverly Hills students. The program gives young people who are interested in the arts an opportunity to attend world-class performances and learn more about the arts from distinguished professionals.

### **3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?**

In just four years, The Wallis has transformed the cultural landscape of Beverly Hills through our mainstage performances, education initiatives, and community programs. Our unique community programs have provided access to the arts for individuals who may have previously had limited local opportunities to engage as audience members and students. These programs enhance the quality of life of participants, enrich the entire community, and contribute to the vitality of Beverly Hills. The community service aspect of these programs unites and uplifts the Beverly Hills community by providing a means for the City to give back to other local communities, and welcomes the entire broad and diverse residents of the Greater Los Angeles Area to share this cultural resource.

The Wallis's community programs:

- **Contribute to the cultural vitality of individual Beverly Hills residents and of the community at large.**

The Wallis's community activities – from free outdoor Dance Sundays, to performing arts classes for all ages, to arts education opportunities for public school students – provide world-class arts engagement for the people of Beverly Hills. Arts participation fosters well-being and a sense of community. Many of these programs are free or low-cost, providing opportunities for everyone to engage in the arts.

The Wallis's programs are visible and large-scale. Even those residents who do not regularly attend performances benefit from Beverly Hills's growing reputation as a vibrant cultural destination.

- **Provide ongoing, unique, and vital arts education and arts engagement opportunities for Beverly Hills prekindergarten through twelfth grade students.**

More than 1,300 students from Beverly Hills Public Schools (Beverly Hills High School, Beverly Vista, El Rodeo, Hawthorne, and Horace Mann) participate in The Wallis's School Partners Program. These students attend world-class performances at The Wallis and also receive in-school arts training led by expert Wallis teaching artists. The arts are an essential part of students' education. California's Visual and Performing Arts Content Standards for public schools call for a comprehensive approach to arts education that includes both creating/performing as well as "Aesthetic Valuing" – a standard that asks students from prekindergarten through twelfth grade to develop the ability to "Respond to, Analyze, and Make Judgments" about the performing arts. Attendance at quality, live performing arts experiences is fundamental to the development of this skill.

- **Are an economic stimulus that draws visitors to Beverly Hills.**

Programs like Dance Sundays draw more than 1,000 individuals – both residents and non-residents – to the City's civic center year-round. They establish Beverly Hills as a significant cultural destination that offers innovative, outstanding arts programming led by and featuring world-class artists. These programs promote Beverly Hills as a cultural leader to the broader Southern California community.

- **Create opportunities for individuals who frequently do not have access to arts opportunities.**

Our programs include targeted offerings for the elderly; families with young children; youth and adults with autism; and people with Parkinson's disease.

4. **What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?**

Our community programs serve as many as 10,000 individuals total. Beverly Hills community members represent over 1,500 of these individuals, including 1,300 Beverly Hills public school students. In addition, Beverly Hills residents represent 33% of the 50,000+ paid audience members who attend our performances.



- 5. The funding year is July 1, 2017 to June 30, 2018. What is the funding amount requested? Would you plan to reapply during future cycles?**

The Wallis requests a grant of \$10,000 for the grant period of June 1, 2018 to May 31, 2019. Our community programs are ongoing and we intend to reapply in future years.

- 6. What percentage of your annual funding would the City's contribution represent?**

The City's contribution would represent approximately 1% of our total annual contributed and earned income.

- 7. What is the ratio of your organization's administrative operating costs?**

Administrative expenses comprise approximately 10% of our total operating budget.

- 8. Financial Statement: a. For grant requests up to \$74,999, please submit most recent balance sheet and operating budget OR tax return. b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.**

Attached.

- 9. Provide any additional information that may be useful in evaluating your proposal. Cultural applicants, please describe your program here.**

The mission of the Wallis Annenberg Center for the Performing Arts is to create, present and celebrate unique performing arts events and educational programs that reflect the rich cultural diversity of our community. Each year, The Wallis serves more than 50,000 ticket buyers, more than 5,500 youth who participate in our education programs, and several thousand more community members who attend our classes, free programs, and community events. The Wallis is also a highly in-demand location for special events, with high profile businesses and non-profit organizations renting areas of our campus for their most significant annual events.

The Wallis believes everyone deserves to learn and grow through the arts. Our mission-centric education and community programs serve this goal and establish The Wallis not only as a prominent performing arts destination, but also as a cultural center and resource for the entire community. Through these programs, we enable individuals who have limited arts opportunities to engage in with the very best in the performing arts; we use the power of the arts to build community and address pressing social issues; and we respond to critical needs in the greater community through arts leadership, collaboration and partnership.

Our deep connection with the Beverly Hills community is central to all we do at The Wallis. City residents are active members of our audience and of our organizational and board leadership. We partner with businesses throughout the City to help our audience members make the most of their visits to Beverly Hills and The Wallis, and our patrons contribute to the vitality and economy of the community. Beverly Hills residents participate widely in our community and education programs, and these offerings provide opportunities for all residents to connect and engage in the arts, regardless of age, socioeconomic status, past arts experience, or health status. We thank you for your consideration of our application in support of these vital programs.

**Submission of the following documents is required:**

- ☒ Completed CAGF application,
- ☒ Documentation of 501c.3 status or proof of 501c.3 status through partnership,
- ☒ Copy of most recent Form 990 - Return of Organization Exempt from Income Tax,
- ☒ Copies of any current Charitable Solicitations Permits that have been obtained from the City of Beverly Hills.

**Please note that insurance requirements have changed for FY 2018-19.** Within three (3) weeks of receiving notice of funding prior to receiving an agreement, your organization must submit insurance documentation with the following requirements:

- Each organization must submit to City an ACCORD insurance certificate which includes General Liability (\$2 Million), Automobile (coverage limits based on services provided) and Workers Compensation Insurance (if required)
- The City must be named as additionally insured under each policy
- Subrogation must be waived for each insurance policy
- An endorsement to each policy stating that such policy shall not be cancelled by either party or reduced in coverage except after thirty (30) days prior written notice to City

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## APPLICATION SUMMARY FY 2018/19

**Agency:** Westside Food Bank (WSFB)

**Requested amount:** \$110,000

**History of City funding:** CDBG—1986: \$5,700; 1986: \$29,000; 1987-1992: \$25,000 annually; 1993: \$30,000; 1994: \$35,000; 1995: \$38,500; 1996: \$47,000; 1997-2004: \$60,000 annually; 2005: \$61,800; 2006: \$66,500; 2007: \$70,000; 2008: \$72,000; 2009/10: \$72,000; 2010/11: \$75,000, 2011/12: \$75,000; 2012/13: \$80,000; 2013/14: \$85,000; 2014/2015: \$85,000; 2015/16: \$90,000; 2016/17: \$95,000; 2017-18: \$100,000

**Agency description:** Provides food to 70 member agencies south of the Santa Monica Mountains, west of La Brea Avenue and north of LAX. Member agencies near Beverly Hills include JFS – SOVA, PATH West LA Shelter and the weekly meal programs at two Beverly Hills churches.

**Proposed use of Community Assistance Grant Funds:** Bulk purchase of food in order to maintain and expand the programs of the social service agencies that have direct service food assistance programs, either as community food pantries, or as programs that supply food to shelter residents or congregate meals for homeless people.

**Target population/Primary service:** Food assistance for low-income individuals and families/food assistance.

**Percentage of total program utilized by Beverly Hills community:** No data available.

**Quantifiable Services and Measures:** The Jewish Family Service (JFS) food pantries - SOVA and Metro, are the WSFB's biggest customer. In 2017 WSFB gave 388,681 pounds to these two sites. SOVA is now experiencing approximately twice as many client visits as it had in 2008. JFS pays WSFB about \$7,000, or 1.8 cents per pound of food thanks to heavy subsidies from WSFB. Using the customary Feeding America standard, SOVA would need to pay nearly \$75,000 – and the food was actually worth over \$650,000. In 2017, WSFB distributed over 4,400,000 pounds of food to their member agencies.

**Current Performance:**

FY 17/18: (Q1 & Q2)

☒ Satisfactory

☐ Unsatisfactory

**General Comment(s)** (e.g., non-quantifiable benefits identified by experience with agency v. absolute numbers; observations such as their growth curve and relationship with City, its residents and target populations):

In 2017, the number of food-seeking visits made to the pantries WSFB served was 88% higher than the number of pantry visits made in 2008. In 2012, at WSFB's high watermark for overall funding, they were able to spend an average of \$24,000 per week on food, however, their current budget allows for just \$17,350.

State Senator Ben Allen named WSFB as his "2017 Nonprofit of the Year."

**Percentage of annual funding City's contribution represents:** \$110,000 in funding would represent about 5.8% of WSFB's current operating budget.

**Ratio of administrative to operating costs:** Admin 6%; fundraising 13%; program 81%

**Service Profile:** Needs-based ☒ Quality of life-based ☐ Social Service ☒  
Health ☒ Education ☐ Other ☐

**Agency Scope:** Local ☒ Regional ☒ National ☐ International ☐

**501 (C) (3):** Yes ☒ No ☐ Exempt ☐



CITY OF BEVERLY HILLS  
COMMUNITY ASSISTANCE GRANT FUNDING APPLICATION  
FY 2018-2019

AGENCY/PROJECT NAME:	Westside Food Bank (WSFB)
ADDRESS:	1710 22nd St, Santa Monica, CA 90404
CONTACT PERSON:	Bruce Rankin, Executive Director
PHONE:	310-828-6016
FAX:	310-828-2646
EMAIL:	bruce@westsidefoodbankca.org

Please type your answers to the following questions:

1. Is your organization a 501c.3 or are you in partnership with a 501c.3 organization?  
☒ We are a 501c.3 ☐ We are in a partnership with a 501c.3

☒ Documentation showing 501c.3 status or partnership with a 501c.3 is attached.

2. What services do you propose to provide the Beverly Hills community that local government is not currently providing?

WSFB has been funded by City of Beverly Hills each year starting in 1986. For the fiscal year ending 6/30/18 the City's funding level is \$100,000. This funding is being used for the bulk purchase of food that we supply to Westside social service agencies that have direct service food assistance programs, either as community food pantries, or as programs that supply food to shelter residents or congregate meals for homeless people. WSFB is the food bank warehouse assigned to provide food to agencies throughout an area that is south of the Santa Monica Mountains, west of La Brea Avenue, and north of LAX. Our food currently goes to more than 70 member agencies, more than half of which pick up food at least once a week at our warehouse. In 2017 we distributed approximately 4,400,000 pounds of food to our member agencies.

We are able to utilize the economy of scale, by purchasing food in large quantities. This enables us to achieve a food cost index that is significantly lower than what any one direct service food distribution agency can obtain. Our large warehouse in Santa Monica also allows us to accept, process, store, and distribute large quantities of donated food. Without the service we provide, many of the 40 agencies that pick up food from our warehouse on a regular basis would fall far short of having access to enough affordable, nutritious food to distribute to their clients.

We propose to use Beverly Hills City funding to help maintain and expand our food purchase program, so that we can get more food to those in need in the Beverly Hills area and throughout the Westside.

3. Why are these services considered critical (e.g., enhance quality of life, improve public safety)?

With local people facing sky-high housing costs along with diminished safety net programs such as CalFresh and WIC, many local people need food assistance for their families. Getting our food staves off hunger and poor nutrition for those in the BH community and throughout the Westside. Our food promotes the growth and development of local children who get nearly half of the food we distribute.

All of our food goes, via our member agencies, to people in need on the Westside, mostly through food pantry programs. Since the Great Recession of 2008 local need has not receded. In 2017 the number of food-seeking visits made to the pantries we serve was 88% higher than the number of pantry visits made in 2008.

The US Dept. of Labor publishes an annual list of "Labor Surplus Areas", highlighting those cities where unemployment is more than 20% higher than the national average: <https://www.doleta.gov/programs/lssa.cfm>. The FY 2017 list includes just 28 of the 88 cities in Los Angeles County. Beverly Hills is on that list; the surrounding cities of West Hollywood, Culver City and Santa Monica are not.

In 2012, at our high water mark for overall funding, WSFB was able to spend an average of \$24,000 per week on food; our current budget allows for just \$17,350. We've made up some ground through improved efficiencies and a greatly expanded produce gleaning project, but in 2017 we had a 6% reduction in our food distribution as compared with 2012, with the local need remaining just as high.

4. What percentage of your total program service is utilized by members of the Beverly Hills community? If a new program, what percentage of users do you anticipate would be members of the Beverly Hills community?

Westside Food Bank serves all of the food pantries that surround Beverly Hills, the most prominent one being SOVA, the food pantry program of Jewish Family Services, our biggest customer. The BH-adjacent SOVA site is SOVA West (near Pico and Robertson, just 1/4 mile from BH). In 2017 we gave 388,681 pounds to SOVA. SOVA is now experiencing nearly twice as many client visits as it had in 2008, the year leading up to the Great Recession. As a member of Feeding America, the nation-wide food bank trade association, we would have been allowed to charge 19 cents per pound for the food we give to SOVA, and that is what most food banks would do. To better serve our member agencies we have chosen to shoulder much more of the fundraising burden, and we charge less than a tenth of what we're allowed by Feeding America. SOVA is paying us about \$7,000 per year for all the food they get from us (1.8 cents per pound). Using the customary Feeding America standard, SOVA would need to pay us nearly \$75,000 - and, according to the food valuation used by Feeding America, the food we gave SOVA in 2017 would actually have been worth well over \$650,000.

Besides SOVA, our member pantry most likely to serve those from Beverly Hills is St. Augustine's Pantry in Culver City which gets 95% of its food from us. We also regularly give food to the P.A.T.H. Cotner Shelter, near Pico and Sepulveda, and we give smaller amounts to two weekly meals programs that are located in Beverly Hills churches.

5. The funding year is July 1, 2018 to June 30, 2019. What is the funding amount requested? Would you plan to reapply during future cycles?

WSFB requests \$110,000 for the year for food purchases. (In view of the still critical local need for food assistance, we are asking for funding that is 10% higher than \$100,000, the current level of our funding from the City of Beverly Hills.) We plan to apply during future cycles.

6. What percentage of your annual funding would the City's contribution represent?

\$110,000 in funding from the City would represent about 5.8% of our current operating budget which calls for annual income of \$1,904,000. WSFB also gets funding from individual supporters, private foundations, religious congregations, and service clubs, as well as from City of Santa Monica and the Federal Government's Emergency Food and Shelter Program.

7. What is the ratio of your organization's administrative operating costs?

According to our financial audit, in fiscal year 2016-2017 our cost breakdown was as follows: Administration = 6%; Fundraising = 13%; Program = 81%. (This is calculated on a cash-only basis; to provide maximum clarity we choose not to mix in any valuation of donated goods and services, and we show the full impact of fundraising event costs by separately listing event costs and event income.) We expect our cost pattern to remain virtually the same in the current fiscal year and in the next year, as well.

8. Financial Statement:

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- b. For grant requests \$75,000 and over, please submit most recent financial statement reviewed by a Certified Public Accountant.



9. Provide any additional information that may be useful in evaluating your proposal. If you are a cultural applicant, please describe your program here.

--- Our Board has further refined our food bank nutrition policy which is designed to make us accountable for improving our already high quality food distribution mix. In 2017, high fat snack foods, dessert-type foods, and sugar sweetened beverages altogether made up less than 1% of our distribution.

--- We are especially committed to ending food insecurity among veterans in our service area. We have expanded our raised bed vegetable garden project on the West LA VA campus, and for more than a year we have been doing a weekly tailgate produce distribution to at least 150 vets per week at the VA. We are also teaming up with UCLA to restore the old "Vet's Garden" on the VA campus.

--- We are also especially committed to ending food insecurity among college students, having tripled our distribution to UCLA's food pantry since 2015, and within the past year, helping to open new food pantries at West LA College, Mt. St. Mary's University, and Santa Monica College (which alone now receives nearly 10,000 pounds per month from us).

We have not obtained any Charitable Solicitation Permits from the City of Beverly Hills.

Submission of the following documents is required:

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