

## JFS Express

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*FY23-24 Small Grant*

### *Jewish Family Service of the Desert*

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Kraig Johnson  
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Palm Springs, CA 92262

info@jfsdesert.org  
O: 760-325-4088

### *Kraig Johnson*

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Palm Springs, CA 92262

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O: 760-325-4088 x101

## ***Organization Information***

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### **Organization Name\***

Jewish Family Service of the Desert

### **Organization Billing Address\***

If approved, your check will be mailed to the address you provide below.

490 S. Farrell Dr. Suite C208, Palm Springs, CA 92262

### **Organization Mission Statement\***

To provide for the social service needs of the Jewish and general community throughout the greater Coachella Valley with a commitment to promote the well-being of people of all ages, incomes and lifestyles.

### **CEO/Executive Director Name\***

Kraig Johnson

### **CEO/Executive Director Email Address**

kjohnson@jfsdesert.org

### **Board President Name\***

Joanne Chunowitz

### **Board President's Email Address\***

golcondaj@yahoo.com

### **Board of Directors Roster\***

Please upload Board of Directors roster, including affiliations

JFS Board of Directors Roster FY2023-24\_January 2024.pdf

### **Diversity, Equity, Inclusion Organizational Data**

Please complete the following table to the best of your knowledge.

**Staff:** include paid or unpaid staff

**Senior Leadership:** include any supervisor or head of department (Ex: Director, Manager, President, Vice-President)

**Board of Directors:** include all active Board Members

Number of	Staff	Senior Leadership	Board of Directors
Black	0	0	1
Indigenous	0	0	0
Latinx	0	2	0
Asian/Pacific Islander	0	1	0
Other	0	1	1
LGBTQ+	4	2	1
Female	17	4	13
Male	5	3	6
Gender Non-Conforming	0	0	0
People with Disabilities	0	0	0
Seniors	7	5	19
Veterans	1	0	1

### Organizational Data

<b>Total Number of Staff</b>	29
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<b>Total Number of Board of Directors</b>	19
<b>Is your CEO/Executive Director minority-led?</b>	No

## *Project/Program Details*

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### **Funding Priority\***

Please select one or more that align with your program request.

Health

### **Program Name\***

JFS Express

### **Program Description\***

Describe the Program and the unmet need being addressed.

The JFS Express program was created to meet the transportation needs of Coachella Valley older adult residents, ensuring they can access affordable and available transportation for medical appointments, especially in areas where transportation options may be limited. Despite the gains made in telemedicine, a lack of transportation is one of the greatest barriers to maintaining good health. Thus, providing affordable and accessible transportation can significantly improve the quality of life for older adults by ensuring they receive the healthcare they need in a timely manner.

The Coachella Valley has experienced a gradual rise in its senior population, with approximately 177,700 adults aged 55 and older, marking a steady increase over the past decade. A significant portion of adults in the region, 24.6%, are aged 70 or older, attributing to the Valley's status as a major retirement destination. As the senior population grows, so do their needs for social services (HARC 2022).

The JFS Express volunteer transportation provides round-trip transportation to medical appointments for Coachella Valley residents aged 55+ who have limited, viable transportation options. JFS Express guidelines note that the program is for seniors with no transportation options or for whom options (e.g., through their insurance providers) have been utilized or are no longer available. Generally, JFS Express clients are individuals who are functionally homebound, unable to access other means of transportation and have limited financial resources. Some of the clients state they had difficulty walking to a bus stop, climbing steps, fastening seat belts, stepping onto a high vehicle, and waiting for long periods of time. The JFS Express program offers curb-to-curb service, including assistance from the “threshold” of their residence to the appointment location. In addition, our volunteer drivers take just one rider at a time and can pick up riders with minimal wait time. Because of the increased access to “routine” medical appointments, JFS Express clients may have fewer ER visits, fewer missed medical and social service appointments, and reduced isolation.

The program is managed by the JFS Transportation Coordinator, who completes an intake on each client, obtains demographic information, screens for quality-of-life issues, confirms eligibility, and schedules rides. JFS Express employs a sliding cash scale in assessing client fees based on the client's income. Fees typically range from \$0-\$6 for the roundtrip transportation. But, JFS does not invoice the client, pursue outstanding balances, or deny future services if JFS Express clients don't pay. Use of the fee scale helps reduce the number of late cancellations in an effort to reduce unnecessary volunteer travel.

JFS Express offers Coachella Valley residents an inexpensive transportation option to help keep them connected to healthcare and maintain or improve their physical and mental conditions.

## Goals and Desired Outcomes\*

Please state both the initial objectives and the anticipated outcomes for this program, including both quantitative and qualitative aspects.

### Examples:

Quantitative: We hope to provide services to 100 people.

Qualitative: We want clients to increase their self-esteem.

For the 12-month grant period, JFS proposes:

- 30 older adult Coachella Valley residents will receive transportation services to medical appointments;
- JFS will provide 100 roundtrip transportation services to medical appointments; and
- 100% of all program clients will be informed of JFS mental health counseling and case management services, including emergency financial assistance;

In addition,

- 70% of clients receiving JFS Express services and completing a survey will report the program helped their immediate medical transportation needs;
- 70% of clients receiving JFS Express services and completing a survey will report their driver as helpful.
- 80% of clients receiving JFS Express and completing a survey will report that they would recommend JFS services to others.

Two additional program outcomes are 1) the reduction of senior isolation and 2) increased senior safety. Seniors who lack needed transportation are at an increased risk of being isolated, and JFS Express drivers constantly report client "excitement" for the chance of engaging directly. Recent data indicate that isolation is as physically deleterious as smoking a pack of cigarettes, so the benefits of this outcome are far-reaching. And, JFS Express drivers are trained to be mindful of safety concerns such as fall risks, and they report concerns to the Transportation Coordinator, who engages with the client and colleagues to mitigate any dangers.

Seniors who seek assistance from strangers may unknowingly put themselves in a precarious situation, whereas receiving support from a trusted provider such as JFS significantly reduces the likelihood that senior clients will fall prey to unscrupulous actors.

**Does your organization have policies or practices that ensure everyone, regardless of race, religion, gender, or sexual orientation, can access your services without discrimination?\***

Yes

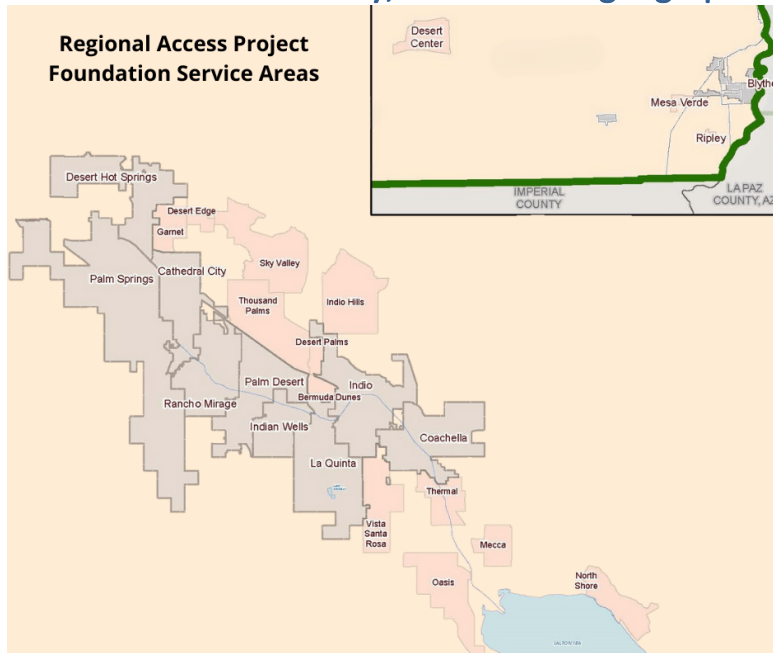
**If no, please explain why?**

N/A

**Is the geographic area served to encompass all of Coachella Valley?**

All Coachella Valley

**If not all Coachella Valley, list all of the geographical areas served**



**Target Population Age Group\***

55 to 64  
65+

**Target Population Ethnicity\***

Please select the ethnic group(s) your project will serve.

Hispanic/Latino (of any race)  
Non-Hispanic or Latino (of any race)

**Target Population Race\***

Please select the race group(s) your project will serve.

American Indian and Alaska Native  
Asian  
Black or African American

Native Hawaiian and other Pacific Islander  
 White  
 Some other race

## Estimated number of persons to be impacted by your Program\*

30

## Target Population\*

Describe the population demographics who will benefit from your program (For example, socio-economic status, sex, gender, etc.) and explain the estimated number of persons to be impacted.

In its Coachella Valley Community Health Survey, Health Assessment and Research for Communities (HARC, 2018) reported that 31% of the Valley's population of 406,889 were adults aged 55+, a significantly larger percentage of older residents than in the state as a whole (23%). Nearly 40% of Valley seniors had household incomes less than 250% of the Federal Poverty Level (FPL), with 15.1% at 100% FPL or less. The 2020 U.S. Census, reports the Coachella Valley with 58,587 residents aged 55+ (31% of the total population), and the California Department of Aging estimates the county's population aged 60+ will grow 248.22% between 2010 and 2060. 7.5% of Coachella Valley residents aged 55+ listed transportation as a common barrier to healthcare access, and 6.7% as the third most common need after utility and financial assistance respectively (HARC 2022). Roundtrip transportation will be provided to 30 older adults, 73% female, 27% male, and approximately 90% living with low incomes.

## Measurement/Evaluation\*

Describe the measurement tools/methodology utilized to collect data and evaluate the impact of the service/program.

JFS uses an Electronic Health Record system (EHR) to register clients and obtain and store pertinent mobility information such as wheelchair use, difficulty hearing or seeing, etc., and demographics. The EHR is also used to schedule and track the completion of services, as well as client feedback via satisfaction surveys.

## Partnerships/Collaborators\*

Name partners or collaborators and explain their role in the program/project. Enter N/A if you are not collaborating on this program/project.

JFS volunteers form a crucial part of the JFS Express program by offering transportation services to enrolled older adults using their personal vehicles. They go through a meticulous screening procedure, which includes confirmation of a valid California driver's license and car insurance, as well as undergoing a comprehensive background screening that includes an FBI background check.

Volunteer assistance is augmented through the use of Sunline Transportation Agency services, including their Sundial paratransit service, SunCommute, and taxi voucher, paid for through a generous grant provided by the Fogelson Family Foundation. Interestingly, despite the availability of these "professional" services, most JFS Express clients prefer volunteer transport because of the increased care shown by JFS drivers compared to others. But, this addition nearly ensures our ability to offer transportation assistance to JFS Express clients.

Because of the personalized benefits offered by the JFS Express program and clients' preference for volunteer drivers, efforts are first made to engage with a volunteer, and Sunline services are offered to clients if volunteer support is unavailable.

Efforts to increase the number of JFS Express drivers include multiple presentations to service groups such as Rotary, Chambers of Commerce, and Lions Club in addition to participating in Riverside County's RSVP volunteer program.

### Program Start Date\*

07/01/2023

### Program End Date\*

06/30/2024

*Comment: Once the request is considered toward the end of May, the grant period will end after one month. Is this correct, or does the program continue?*

## Financial

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### Amount Requested\*

Maximum Request: \$10,000.

\$10,000.00

### Other Financial Support/Sustainability\*

Please provide details of other funding opportunities and the amounts you have requested for funding for this Program. Additionally, please describe the financial sustainability plans for the program/project after the RAP funding ends.

JFS Express has been available since 2008. Despite the program's longevity, financial support was only sought sparingly due to substantial volunteer availability; however, transportation requests continue to mount. The Jewish Federation of the Desert offered support as part of a Case Management program grant, and, in FY 2021-22, the Fogelson Family Foundation directed \$10,000 to be utilized to pay for Sunline, Uber, or Lyft support in the event it became necessary. The program largely leaned on its volunteers until the COVID pandemic caused the program to be suspended, and the retirement of the agency's previous Transportation Coordinator further delayed the return of this program. Accordingly, the Fogelson support funds are largely still available.

JFS has a renewed focus on the provision of transportation services. In the summer of 2023, JFS assessed the need for the program, and a new Coordinator was assigned. While the Coordinator trained for the opportunity, program guidelines and documents were revamped, and a digital enrollment form was created.

A reception for JFS Express drivers allowed for introductions to the new Coordinator, and marketing of the program to Coachella Valley service providers has begun.

As the program reemerges, JFS will resume its efforts to secure funding from private and corporate grants, as well as local government, to ensure the continued availability of the program. Funding from the RAP Foundation will ensure the Coordinator is fully engaged during this crucial program stage.

## Program/Project Budget\*

### BUDGET TEMPLATE LINK

Please click on the provided Budget Template link to complete the required budget. Make sure to use only this specific template and fill out all sections included in the budget. After filling out the template, save it to your computer. Finally, use the "Upload a File" button to upload the saved budget file.

JFS\_RAP\_Fdn\_CM-JFSExpress\_Prog-Budget\_20240219.xlsx

## Upload your most recent financial statements\*

Please upload official statements/reports.

### Preferred:

- Audited Financials
- QuickBooks: Statement of Financial Position/ Statement of Activity (minimum of 6 months)
- Official 990 Form

JFS\_financials-audited\_fyeJun2023.pdf

## *Required Uploads*

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### IRS W-9 Form\*

#### W-9 FORM LINK

Please upload a W-9 form by clicking on the link for the W-9 form above. Please ensure that a signed and dated W-9 form is uploaded.

JFS W9 rev oct2018-temp-signed\_20240131.pdf

### IRS Determination Letter for tax-exempt status\*

#### IRS DETERMINATION LETTER LINK

Provide a copy of your IRS Determination Letter. Letters can be found using the link above.

IRS\_501c3\_Exemption\_letter\_20221129.pdf

Jewish Family Service of the Desert  
Board of Directors FY2023-24  
REV 5/1/2023

Full Name and Board Position	Organization/Business	Phone Number and Email Address
Joanne Chunowitz, President	Retired Reading Specialist	(760) 488-1944 <a href="mailto:golcondaj@yahoo.com">golcondaj@yahoo.com</a>
Audrey Berstein, Co-Vice President	Retired	(414) 640-8205 <a href="mailto:akb53217@hotmail.com">akb53217@hotmail.com</a>
Gail Scadron, Co-Vice President	Retired	(312) 560-7928 <a href="mailto:gmscadron@aol.com">gmscadron@aol.com</a>
Lee Erwin, Secretary	Executive Director, Contour Dermatology	(760) 774-7119 <a href="mailto:lerwin@contourderm.com">lerwin@contourderm.com</a>
Barry Kaufman, Treasurer	Retired Accountant	(760) 360-9902 <a href="mailto:bkauf@cox.net">bkauf@cox.net</a>
Nona S. Solowitz, Assistant Treasurer	Owner, Solowitz YEH Certified Public Accountants	(760) 567-4576 <a href="mailto:nona@solowitzyeahcpa.com">nona@solowitzyeahcpa.com</a>
Aviva Snow, Immediate President	Retired Realtor	(650) 400-1228 <a href="mailto:avivasnow@gmail.com">avivasnow@gmail.com</a>
Oscar Armijo, Director	President, Armijo and Associates Accounting Corporation	(760) 567-4716 <a href="mailto:oscara@armijoandassociates.com">oscara@armijoandassociates.com</a>
Michelle Carafiol, Director	Retired	(214) 563-5757 <a href="mailto:michybrenner@gmail.com">michybrenner@gmail.com</a>
Debra Carrington, Director	Founder and CEO, Summer Colony Living	(310) 863-6024 <a href="mailto:debra@summercolonyliving.com">debra@summercolonyliving.com</a>
Bob Caruso, Director	SVP, Regional Manager, PNC Bank	(760) 212-3784 <a href="mailto:bob.caruso@pnc.com">bob.caruso@pnc.com</a>
Jerry Fogelson, Director	Semi-Retired Real Estate Developer	(760) 218-7888 <a href="mailto:jerry@fogelsonproperties.com">jerry@fogelsonproperties.com</a>
Loren Friend, Director	Retired	(847) 525-4315 <a href="mailto:lorfriend@aol.com">lorfriend@aol.com</a>
Lois Gold, Director	Retired Family Therapist	(503) 703-1740 <a href="mailto:loisgold45@gmail.com">loisgold45@gmail.com</a>
Bob Goodfriend, Director	Business Owner	(865) 207-2229 <a href="mailto:bgoodfr1@yahoo.com">bgoodfr1@yahoo.com</a>
Jan Gordon, Director	Retired VP of Financial Services	(760) 636-9123 <a href="mailto:jgordon310@aol.com">jgordon310@aol.com</a>
Margie Kulp, Director	Retired Social Worker	(760) 770-3242 <a href="mailto:mzmarge@gmail.com">mzmarge@gmail.com</a>
Nancy Levine, Director	Realtor	(760) 219-5111 <a href="mailto:nancyblevine@gmail.com">nancyblevine@gmail.com</a>
Renee Mayer, Director	Retired Travel Agent	(760) 360-7806 <a href="mailto:rjm1249@gmail.com">rjm1249@gmail.com</a>

## PROPOSED PROGRAM BUDGET

Once complete, save to your device and then upload to your application using the button provided in the

Name of Organization: JEWISH FAMILY SERVICE OF THE DESERT

Name of Program: CASE MANAGEMENT - JFS EXPRESS

Instructions:	Include all expenses for the program in this column.	Indicate how the request for RAP funds will be allocated.	Determine the remaining funding gap for the program.
Program Expenses	Total Program	Total Expenses to be	Funding Gap
Full-time staff wages and salaries	\$ 295,180.00	\$ 10,000.00	\$ 285,180.00
Part-time staff wages and salaries	\$ -		\$ -
Temporary staff wages and salaries	\$ -		\$ -
Employee benefits	\$ 82,660.00		\$ 82,660.00
Volunteer-related costs	\$ -		\$ -
<b>Total Staff Cost</b>	<b>\$ 377,840.00</b>	<b>\$ 10,000.00</b>	<b>\$ 367,840.00</b>
Equipment costs	\$ 2,540.00		\$ 2,540.00
Marketing/advertising expense	\$ 860.00		\$ 860.00
Legal services	\$ -		\$ -
Consulting services	\$ -		\$ -
Other professional services	\$ -		\$ -
Facilities costs & utilities expense	\$ 21,120.00		\$ 21,120.00
Meeting expenses	\$ 510.00		\$ 510.00
Mileage and travel	\$ 630.00		\$ 630.00
Postage and shipping	\$ 780.00		\$ 780.00
Program/Supplies expenses	\$ 3,740.00		\$ 3,740.00
Phone/fax/cell/internet costs	\$ -		\$ -
Insurance	\$ 3,510.00		\$ 3,510.00
Emergency Assistance expenses	\$ 90,820.00		\$ 90,820.00
Indirect operating expense	\$ 50,240.00		\$ 50,240.00
<b>Total Administrative Expenses</b>	<b>\$ 174,750.00</b>	<b>\$ -</b>	<b>\$ 174,750.00</b>
<b>TOTAL PROGRAM EXPENSES</b>	<b>\$ 552,590.00</b>	<b>\$ 10,000.00</b>	<b>\$ 542,590.00</b>
<b>TOTAL PROGRAM REVENUE</b>			
Amount requested from RAP		\$ 10,000.00	
Cash contributed by your organization		\$ 194,150.00	
Grant(s) awarded from other funding sources		\$ 294,730.00	
Grant(s) pending or applied for from other funding sources		\$ 53,710.00	
Value of any in-kind goods or services in support of the project		\$ -	
<b>TOTAL PROGRAM REVENUE</b>		<b>\$ 552,590.00</b>	

re application

**BUDGET NARRATIVE: (Please elaborate on the total expenses to be funded by RAP)**

a) salary for the Case Manager who coordinates/manages the JFS Express volunteer ride assistance program for JFS clients.

<b>TOTAL ORGANIZATION REVENUES FROM LAST YEAR'S FINANCIALS</b>	
Contributions/grants/govt funding <b>(Unrestricted)</b>	\$ 1,319,985.00
Contributions/grants/govt funding <b>(Restricted)</b>	\$ 201,188.00
Service revenue	\$ 596,716.00
Value of any in-kind goods or services	\$ 29,760.00
Other	\$ 721,928.00
<b>TOTAL ORGANIZATION REVENUE</b>	<b>\$ 2,869,577.00</b>



# Evaluation Summary

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## *Overall Score: 85% - 3/3 Evaluations Complete*

<b>Reader 8:</b>	<b>80.00%</b>
<b>Reader 13:</b>	<b>98.00%</b>
<b>Reader 19:</b>	<b>78.00%</b>

## *Question Group*

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### **1. Does the program align with the RAP Foundation's mission and vision?\***

Mission: To provide funding, oversight, technical assistance, and guidance to nonprofits, community-based organizations or other collaborative groups which serve the populations of eastern Riverside County in the areas of health, mental health, and juvenile intervention.

Vision: To enhance the quality of life for all residents of eastern Riverside County by investing in nonprofits and empowering them to effectively serve unmet needs identified by the RAP Board of Directors.

*Max Score: 5*

**Reader 8:** 4  
**Reader 13:** 5  
**Reader 19:** 4

### **2. Does the applicant provide sufficient information about their proposed program?\***

*Max Score: 5*

**Reader 8:** 4  
**Reader 13:** 5  
**Reader 19:** 4

### **3. Does the applicant clearly describe their goals and desired outcomes?\***

*Max Score: 5*

**Reader 8:** 4  
**Reader 13:** 5  
**Reader 19:** 4

### **4. Did the applicant identify both quantitative and qualitative goals and desired outcomes?\***

*Max Score: 5*

**Reader 8:** 3  
**Reader 13:** 5  
**Reader 19:** 4

**5. Does the applicant clearly describe their geographic area and target population?\***

*Max Score: 5*

**Reader 8:** 4  
**Reader 13:** 5  
**Reader 19:** 3

**6. Will this program support a vulnerable population?\***

Example Populations: seniors, youth, BIPOC, disabled, veterans, etc.

*Max Score: 5*

**Reader 8:** 5  
**Reader 13:** 5  
**Reader 19:** 4

**7. Does the organization plan to provide services to a prioritized service area?\***

**Reader 8:** Yes  
**Reader 13:** Yes  
**Reader 19:** Yes

**7a.\***

If Yes, please select the number 5.

If No, please select N/A.

*Max Score: 5*

**Reader 8:** 5  
**Reader 13:** 5  
**Reader 19:** 5

**8. Does the applicant clearly describe their method for evaluation?\***

*Max Score: 5*

**Reader 8:** 3  
**Reader 13:** 4  
**Reader 19:** 3

**If you would like to provide comments or questions for #1-8, please enter them here.\***

If none, enter N/A

**Reader 8:** n/a  
**Reader 13:** n/a  
**Reader 19:** n/a

**9. Is the program financially feasible?\***

Please review the applicant's attached budget on their application.

*Max Score: 5*

- Reader 8:** 4
- Reader 13:** 5
- Reader 19:** 4

**10. Is the program financially sustainable?\***

*Max Score: 5*

- Reader 8:** 4
- Reader 13:** 5
- Reader 19:** 4

**11. Do you recommend funding?\***

- Reader 8:** Yes
- Reader 13:** Yes
- Reader 19:** Yes

**12. Based on your #9 & #11 responses, please elaborate on why you do or do not recommend funding.\***

- Reader 8:** please fund
- Reader 13:** RAP funds are being requested to cover a portion of staff salary. The organization has other funding streams to cover the program's expenses.
- Reader 19:** n/a

**Do you recommend any special conditions?\***

Examples: NPO Centric Standard Digital or Premium Local membership, installments, etc.)

If none, please enter N/A.

- Reader 8:** n/a
- Reader 13:** n/a
- Reader 19:** n/a

**Questions/Comments\***

Please provide questions or comments about the program that would be beneficial for the Grants Review Committee to ask or discuss with the applicant during their interview at the Grants Review Committee Meeting.

If none, enter N/A

- Reader 8:** n/a
- Reader 13:** n/a
- Reader 19:** n/a