YOUNG & HEALTHY

AGENDA
5-25-2022

Welcome	Sandy Roberts
Client Story	Mary Donnelly-Crocker
Consent Agenda	Sandy Roberts
President Report and Announcements	Sandy Roberts
Governance By-Laws Update Nomination Report	Dana Jones
Development Discussion on 2022-2023 Board Give & Get	Cara DiMassa Carrie Walker
Finance Reports Motion to approve Pre Payments Motion to approve Executive Director's Retirement Package 2022-2023 Budget Discussion Motion to approve the 2022-2023 Revenue and Expense Budget	Nick Howell
Strategic Planning	Jamal Nabhani
What's Next	Chris Mayne
Executive Session	Sandy Roberts

June

Social Media Theme:

Donors/Year End Happenings

Events:

Y&H Gathering *6/1*

Staff Meet & Greet with Amy Shapiro *6/17*

Mary's Farewell Fiesta *6/17*

Committee Dates:

Executive *6/6*

Annual Full Board *6/17*

July

Social Media Theme:

Summer Fun

August

Social Media Theme:

Back to School

September

Social Media Theme:

Y&H Programs

Committee Dates:

Executive (Mini Retreat) *9/1*

Development *9/12*

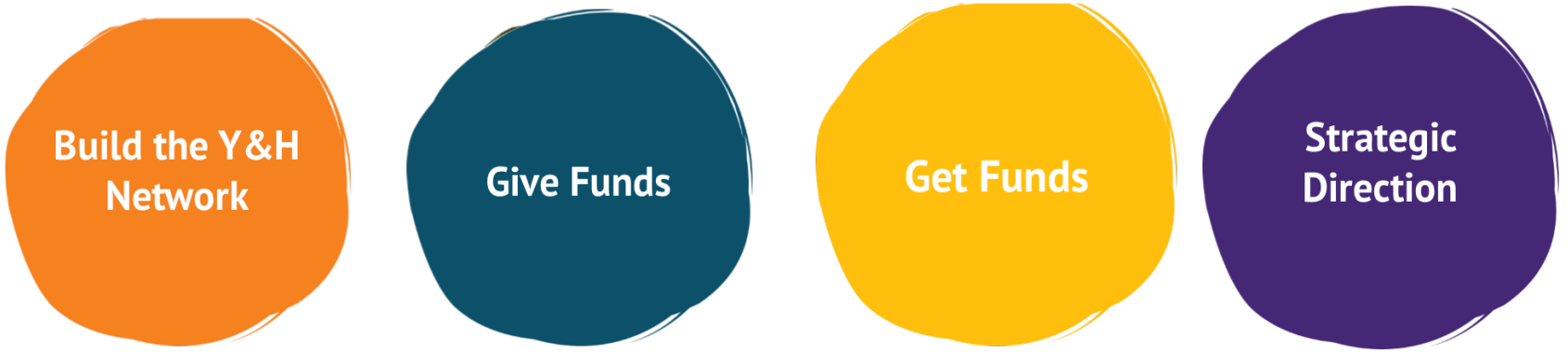
Governance *9/13*

Finance *9/16*

Full Board *9/28*

Strategic Planning *TBD*

Areas of Focus for Young & Healthy Board Members



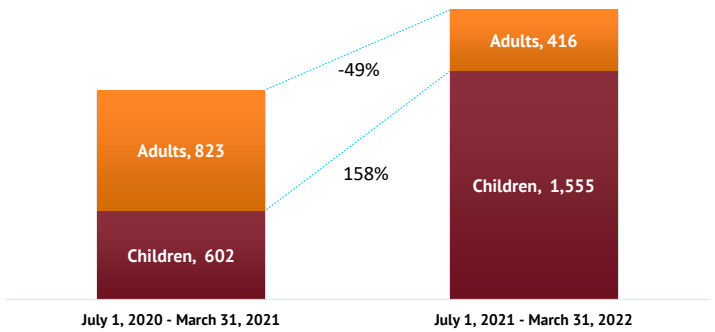
Areas of Focus	What is this?	What will we ask of you?
Build the Y&H Network	•The board acts as the chief ambassadors for the organization and is always enhancing our public image. The board is our most important link to the community.	•Understand the Young & Healthy programs and tell our story. •We will ask you to dig deep into your networks, who can you tell about Y&H? Invite to events? Ask to be a future board member? Review our professional volunteer list to see if your doctor is a part of the Y&H family.
Give Funds	•We ask board members to make a personal donation to Young & Healthy because many foundations ask if 100% of the board contributes to the mission.	•We do not require a minimum amount, but we do ask that you give an amount that is significant for you. **The cumulative goal for our board is to "give" $75,000.**
Get Funds	•This refers to the gifts that you help bring to the organization via personal and professional networks.	•A personal touch can make the difference, whether it's a handwritten note or a personal phone call to talk about the Y&H mission. In an effort to add that personal touch, we will ask you to tell us who you know and to review our donor lists. **The cumulative goal for our board is to "get" $120,000.**
Strategic Direction	•The Board selects, supports and evaluates the Executive Director. •The Board develops policies and provides oversite on everything from development of mission to the procurement of resources.	•You will join a committee, attend meetings and follow up on the work that arises in the committee. •We asked you to be on this Board because you have expertise and a valuable perspective, so we want you to use it! Your voice is as valuable at your first meeting as it is at your last, so speak up.

Dashboard

April Summary Dashboard

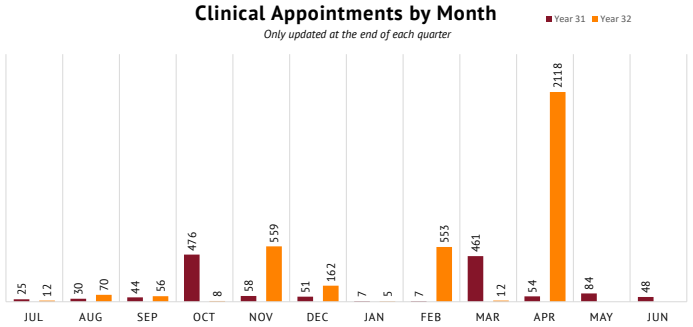
Reporting: July 1- April 30, 2022

Unduplicated clients

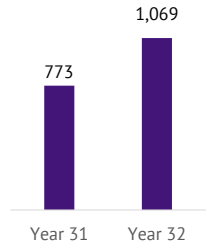


Clinical Appointments by Month

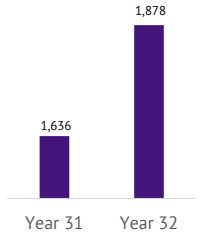
Only updated at the end of each quarter



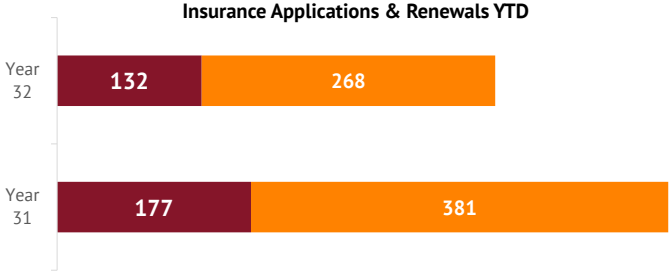
Parent Ed YTD



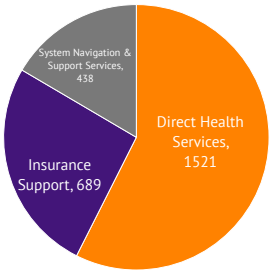
Professional Development



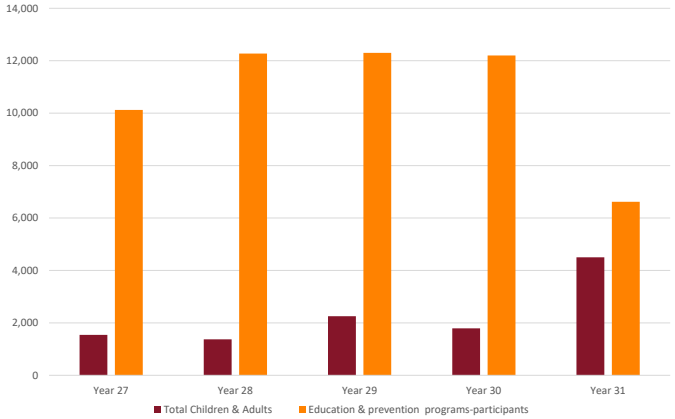
Insurance Applications & Renewals YTD



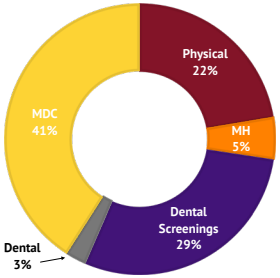
Year 32 Cases YTD



Total Served By Education and Prevention Programs



Year 31: 2020-2021 Breakdown of Services



Admin & Finance

Investment for Reserve

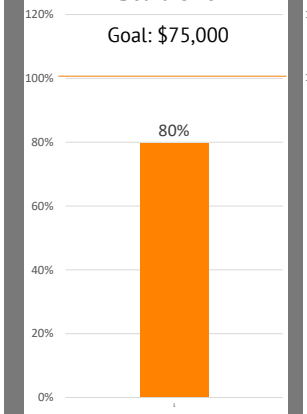
$

$796,226

6.75 Months

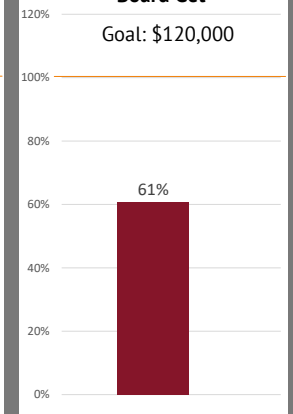
Board Give

Goal: $75,000

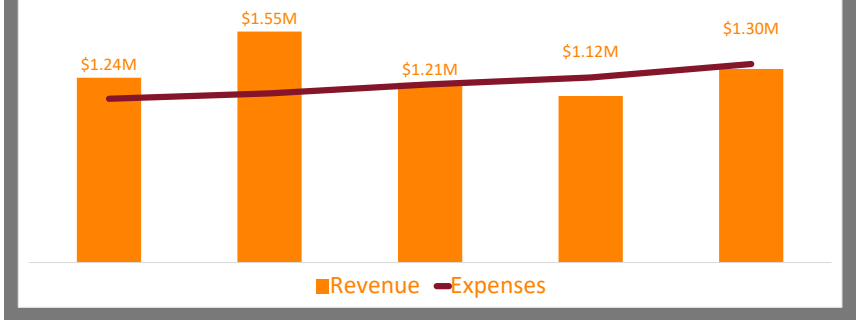


Board Get

Goal: $120,000



Revenue v. Expenses YOY 2016-2021



Consent Agenda

Welcome **Sandy Roberts**

3-30-2022

PRESENT: Board Members: Marjorie Diaz, Cara DiMassa, Roya Fohrer, Maxwell Harwitt, Nick Howell, Chris Mayne, Adrienne Meier, Sandy Roberts
Staff: Mary Donnelly-Crocker, Jan Cantwell, Chastity Diego, Marie Mayen-Cho

Y&H Client Story **Mary Donnelly-Crocker**

Every new donor gets a personal call from Mary. It's an important part of what the ED does. After a call, a donor once asked to do more for Young & Healthy. Because of the outreach, a $1,000 donation turned into a $25,000 donation.

Kaiser is the first foundation that gave money for the Y&H Trauma Informed Care program. In 2016, the Public Health Department conducted an all-day conference on Trauma Informed care. The focus was research around ACEs. The profound effect of ACEs on youth was significant enough to garner the comment, "this could be the most important thing Y&H could ever do." The idea was launched to add trauma informed care to the strategic plan and to focus on making Y&H a multi-center. K.A.P (Knowledge Attitude, Practice) was the model to bring about change and bring about an attitude of change/shift. Kaiser gave Y&H, in 2016, a $75K grant to explore the work of Trauma Informed Care. Mindfulness can mitigate the trauma in the brain, so the start was to bring mindfulness training to the teachers in the schools. In 2018, a grant was received to bring Trauma Informed Care to families. Next was a multi-year grant from the UniHealth Foundation, in partnership with Huntington Hospital. By 2018, Matt Bennet was brought on to do an 18-hour training with the top administrators in the school district. The training started with the principals, next was counselors, support staff and then the community. It was the brain science about why this is such an imperative focus. In 2019, a theater program was developed, "Rise Up". Along the way a Trauma Informed Care committee was formed in Pasadena to focus on the indicators from the California Healthy Kids Survey. Teaching teachers became a focus on how to make a difference. Next, programs were developed to bring this training to families. A new program, Handle With Care, is a way to create communication between the police department and the school district when a child is involved in a police incident.

Consent Agenda **Sandy Roberts**

Motion to approve consent agenda and minutes from 2/2/2022

□1st motion: Chris

□2nd Motion: Cara

Approved 6:47 pm__03/30/22

President Report and Announcements **Sandy Roberts**

Deferred to other reports.

Development **Cara DiMassa & Carrie Walker**

The gala was a success, exceeding our revenue goal by $93,000.

The committee is now working with staff on Mary's retirement party on June 17, Mary's Farewell Fiesta". The chairs are Nancy Foster and Victoria Eaton. The event will be held at the home of Gail and Jim Ellis.

Finance **Nick Howell**

The balance sheet reflects approximately $1.6M. The Gala as of February 28, shows cash is strong and liabilities will go down. Foundations are having a very strong year, projected to reach $748K. Full year projection projects $65K in positive net results, with positive resources from the foundation. Expenses are higher than projected due to additional staff expenses including Mary's retirement and searching for a new ED. At the end of the year, the organization will be in a positive position. Investment accounts as of 3/29/22, $843K, about 2.75% growth over the year. The Finance Committee is watching the needs of the organization in case there is a need to dip into this reserve.

Budget analysis for FY 2022-2023 is in draft form. By the May meeting, the finance committee will ask for approval of next year's budget. The budget is not hugely speculative in projection and is appropriate in the stretch of the projection. Feeling solid in the revenue projection for the coming year but will be refined before approval at the next board meeting. An advance payout is being discussed to deal with these onetime costs., The senior leadership retirements are one-time expenses, and it is reasonable to incur these deficits as one-time expenses that could be covered by reserves. There are also discussions about possible reductions. It was a decided to expose the Board in advance on how these decisions are made before everything is finalized. Reserve position is being reviewed against the potential deficit of next year.

Reserve Account Spending Policy: A draft has been written regarding the policy of spending reserves as an ongoing policy. Donor intent, and diversification of fund development, maintaining an appropriate reserve and putting the money to work. Motion to approve Nick, 2nd Roya. All ayes and no objections, the motion is approved.

Governance **Maxwell Harwitt**

Positive responsed from almost everyone that was asked about joining the executive committee, hopefully by next meeting we will have more decisions to announce.

Ann Huntsman and Julietta Bennett are potential additions to the Board pending committee approval. All approve, Victoria will follow up.

Continuity of staff and board is important moving forward. Cara will be the new president, with Carrie as the Development Chair and will be added as an at-large position to the Executive Committee.

Strategic Planning **Jamal Nabhani**

Jamal was not in attendance, but everything is heading forward as planned.

What's Next? **Chris Mayne**

Executive Search:
1.) Amy Shapiro has been hired as the interim ED starting on June 12 to allow for some overlap with Mary. She has a great deal of experience and is also a great communicator. She will not be a candidate for the full-time job.
2.) The full-time search: The position was posted today, and the plan is to start interviewing in May.

Getting to know the Staff:
A power point presentation on "Getting to Know the Staff" was shown to the Board.

Executive Session **Sandy Roberts**

1.) A retirement package for Mary will need to be finalized in the coming weeks. The final determination will require an executive committee approval.

2.) Jan's retirement plan is in the budget.

3.) May 25th next meeting.

4.) Thanks to all in attendance and specifically to Cara, Chris and Nick who have been amazing and extremely supportive.

YOUNG & HEALTHY

Consent Agenda – Executive Director

Young & Healthy As-An-Employer Updates:

As a part of our strategic planning process, we have completed three major tasks

- **Salary Ranges**
  - For the first time, we have established Salary Ranges for each Young & Healthy staff position.
  - These will need to be reviewed again when the next Center for Nonprofit Management Salary survey is released.
  - Most staff members received an "equity raise" mid-year to bring their salaries more in line with current standards.
  - Thanks to Nevin Trehan-Stanton for his assistance on this process.
  - There will need to be a discussion at the Finance Committee and the full Board on what practices should be adopted when a staff member "outgrows" their salary range.
  - Also NOT tackled in this process is whether we should consider merit raises. Could be a further discussion with new Executive Director and Board
- **Organizational Chart**
  - The Organization Chart has been updated to reflect current staffing practices and program.
  - https://yhpasadena.sharepoint.com/:w:/s/Company/EfQo95kDw1pMhW1tueqpBZwBaqPOOCKysNOETDe7_txhAA?e=UhYug0
- **Job Descriptions**
  - All staffing positions have been reviewed and updated.
  - There is now a "cover page" to each job description that include a brief description of Young & Healthy as well a short description of the work culture of Young & Healthy.
  - Nevin Trehan-Stanton has reviewed the revised Job Description to be sure that they comply with employment law. Thank you Nevin.
  - The job descriptions have been uploaded to a gender bias tool. I happy to say that we are .01% gender bias free. Thank you to Amy Shapiro (soon-to-be-Interim Executive Director) for the suggestion.
    - https://yhpasadena.sharepoint.com/:w:/s/Company/EfPEHq3B1itNs7L3pZUvI4gBT-VODUvlKoeV-qBCBkZnVg?e=y3wQmA
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There are two contracts for next year for which we seek approval. They are both already included in the proposed 2022-2023 budget. One is for our grant writing services and one is for our evaluation services. You will find them in the links below.

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YOUNG & HEALTHY

Consent Agenda – Development

2022-2023 Development Plan is included in the Consent Agenda. This is a summary of the key proposed fundraising events and activities for the next fiscal year. This has been reviewed and accepted by the Development Committee at the May meeting.

Board Give/Get: The Development Committee agreed to recommend to the Board that the 2022-2023 Board Give/Get should be the following:

- Give level - $65,000
- Get level - $100,000.

Gala 2022-2023: Sandy Roberts will chair next year's gala event. Mark your calendars for Saturday, February 4, 2023, this is the target date for the event. More information will follow soon.

Mary's Farewell Fiesta is scheduled for Friday, June 17 at the home of Gail and Jim Ellis. Please RSVP by June 6 via Paperless Post or email Jan at jan@yhpasadena.org.

YOUNG & HEALTHY

Development Plan
July 2022 – June 2023

The following is a summary of the key proposed events and outreach activities for fiscal year 2022-2023.

July 2022:	**Social Media Focus: Summer Fun**
FB/IG posts on local summer events	July 1
Executive Memo	July 14
Mailchimp: Story of the Month	July 14
New Board Orientation	July 20

August 2022:	**Social Media Focus: Back to School**
FB/IG posts on back-to-school info	August 2
Executive Memo	August 15
Mailchimp: Story of the Month	August 15
Multiple Year Pledge bill mailing	August 17

September 2022:	**Social Media Focus: Y&H Programs**
FB/IG posts on YH programs	September 1
Executive Memo	September 15
Mailchimp: Story of the Month	September 15
Invitation Mailing for MDC tours	September 26

October 2022:	**Social Media Focus: Dental Health**
FB/IG posts on dental health	October 3
Gala Patron mailing	October 10
Mobile Dental Clinic	October 10-18
Executive Memo	October 13
Mailchimp: Story of the Month	October 13

November 2022: **Social Media Focus: Giving Thanks**

FB/IG posts thank volunteers/donors	November 1
Annual Appeal Direct Mail-update webpage	November 7
Update website & FB with holiday giving information	November 9
Executive Memo	November 15
Mailchimp: Story of the Month	November 15
Thanksgiving card mailing (major donors/foundations)	November 17
Holiday Card Sale begins	November 21
Alternative Gift Markets	November TBD

December 2022: **Social Media Focus: The Faces of Y&H**

FB/IG posts on staff/board	December 1
Gala Invitation Mailing	December 1
Alternative Gift Markets	December 4
Giving Tuesday	December 6
Executive Memo	December 15
Mailchimp: Story of the Month	December 15

January 2023: **Social Media Focus: Gala**

FB/IG posts on Gala	January 3
Executive Memo	January 16
Mailchimp: Story of the Month	January 16

February 2023: **Social Media Focus: Tax Preparation Program**

FB/IG posts on tax program	month of February
Gala	February 4
Executive Memo	February 15
Mailchimp: Story of the Month	February 15

March 2023: **Social Media Focus: Health & Professional Volunteers**

FB/IG posts highlighting our prof volunteers	month of March
Executive Memo	March 15
Mailchimp: Story of the Month	March 15
Mini Report & Donor Thank you	March 13-16
IP Save the Date	March 20
Spring Direct Mail Appeal	March 27

April 2023:	**Social Media Focus: Volunteer Recognition Month**
FB/IG posts recognizing our volunteers	month of April
IP Invitation Mailing	April 5
Spring Mail Appeal	April 12
Executive Memo	April 13
Mailchimp: Story of the Month	April 13
National Volunteer Week – Bundt Cake Delivery	TBD

May 2023:	**Social Media Focus: Mental Health Awareness Month**
FB/IG posts on IP fundraiser/TIC	May 1
Executive Memo	May 15
Mailchimp: Story of the Month	May 15
It's Possible	May 17

June 2023:	**Social Media Focus: Donor Spotlight/Year End Happenings**
FB/IG posts on year end accomplishments	June 1
Executive Memo	June 15
Mailchimp: Story of the Month	June 15
Board Fundraising Menu/Affiliations	June 19

Note:

1) Grant proposals submitted throughout the year based on individual foundation guideline schedules.
2) The SOTM should be connected to the monthly social media theme when possible.

YOUNG & HEALTHY

Consent Agenda – Finance

- The Finance Committee met on Friday, May 20th and reviewed the 2021-2022 year-end revenue and expenses.
- The 2021-22 year end projections currently reflect a positive net cash flow of approximately $64,119. For complete details please see financials reports attached.
- Nick reviewed the Investment Summary to date. Please refer to the report attached.
- Committee approved the 2022 -2023 proposed budget to move forward to the Board of Directors for approval.

Performance Summary With Flows

Young & Healthy
Prepared By: Douglas Heal
Date Range: 7/1/2021 - 5/17/2022

LPL Financial

Date Range: 7/1/2021 - 5/17/2022

Starting Market Value	Net Inflows & Outflows	Investment Returns	Market Value
$842,642.17	$0.00	($60,201.68)	$782,440.49

Inflows	$0.00
Outflows	$0.00

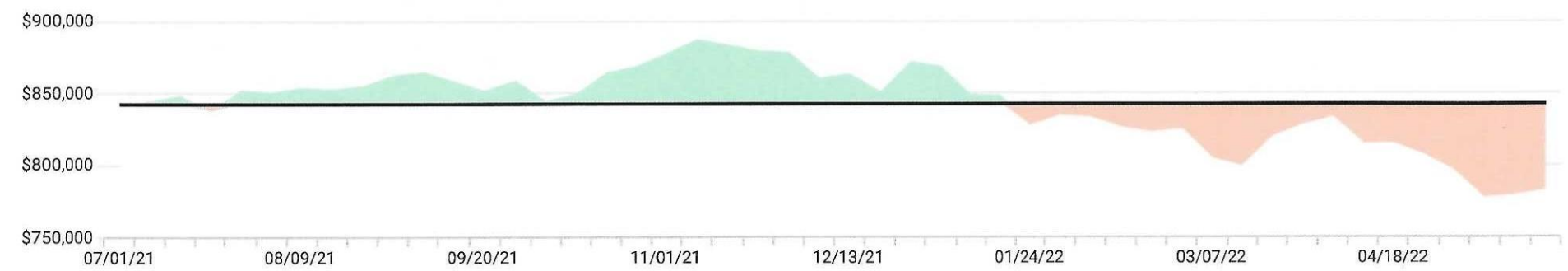
Capital Gain Distributions	$41,132.21
Dividends	$17,331.96
Interest	$0.51
Market Fluctuation	($118,666.36)

Total Return (IRR)	Annualized (IRR)
(7.14%)	n/a

Past performance is no guarantee of future results.

Value Over Time

Date Range: 7/1/2021 - 5/17/2022



Graph Key

Market Value Starting Market Value +/- Flows

Indices are unmanaged and cannot be invested into directly. Past performance is no guarantee of future results.

Accounts

Date Range: 7/1/2021 - 5/17/2022

Institution	Account #	Name	Starting Market Value	Net Flows	Market Value	Total Return (IRR)	Annualized Return (IRR)	Dividend	Interest
LPL Financial	****-7960	YOUNG & HEALTHY	842,642	0	782,440	(7.14)	--	17,332	1

	1 Accounts Total	**842,642**	**0**	**782,440**	**(7.14)**	**--**	**17,332**	**1**

Past performance is no guarantee of future results.

Investment List

Date Range: 7/1/2021 - 5/17/2022

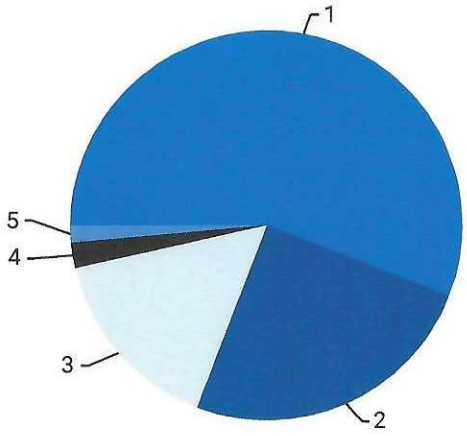
Security Identifier	Description	Institution	Account #	Starting Market Value	Net Flows	Income	Market Value	Total Return (IRR)
Cash	Cash Balance	LPL Financial	****-7960	50	(50)	0	0	0.00
GIREX	APOLLO DIVERSIFIED REAL ESTATE CL A	LPL Financial	****-7960	103,955	0	4,493	122,893	18.22
9999227	Insured Cash Account	LPL Financial	****-7960	6,718	672	1	7,391	0.00
ISFAX	LORD ABBETT MULTI ASSET INCOME CL A	LPL Financial	****-7960	125,751	0	6,085	113,448	(9.79)
LALDX	LORD ABBETT SHORT DURATION INCOME CL A	LPL Financial	****-7960	151,139	0	2,904	144,954	(4.09)
LBNDX	LORD ABBETT BOND DEBENTURE CL A	LPL Financial	****-7960	113,661	0	3,631	101,996	(10.27)
LGLAX	LORD ABBETT GROWTH LEADERS CL A	LPL Financial	****-7960	190,919	0	40,729	143,861	(24.66)
LUBAX	LORD ABBETT ULTRA SHORT BOND CL A	LPL Financial	****-7960	150,449	(622)	622	147,899	(1.28)
	8 Positions Total			**842,642**	**0**	**58,465**	**782,440**	**(7.14)**

Past performance is no guarantee of future results.

Allocation Chart

As Of: 5/17/2022

Portfolio: Underlying Investment Type



Underlying Investment Type	Allocation	
1. Fixed Income	$437,823.25	56.0%
2. Equities	$194,464.12	24.9%
3. Undefined	$122,892.74	15.7%
4. Other	$16,382.90	2.1%
5. Cash	$10,877.48	1.4%
	$782,440.49	100.0%

Cash Flow Breakdown

Date Range: 7/1/2021 - 5/17/2022

No cash flow data available

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Example: Two investors begin by buying 100 shares at the end of the year's price ($10), starting off with $1,000. The first investor makes two subsequent purchases of 100 shares each, one at the end of May ($14) and the other at the end of August ($15). The second investor also makes two additional purchases of 100 shares each, but hers are at the end of April ($8) and September ($9). The price of the security at the end of the year is $11, meaning the security is up 10%. The first investor shows a loss of $600, while the second shows a gain of $600. The time-weighted return for each investor is +10%. The money-weighted return for the first investor is -24.81% and the second investor is +35.04%. In this case, return-on-investment is -15.38% for the first investor and +22.22% for the second.

	Investor 1	Investor 2
	Dec: 100 Shares @ $10/s	Dec: 100 Shares @ $10/s

Performance Summary With Flows

	May: 100 Shares @ $14/s	Apr: 100 Shares @ $8/s
	Aug: 100 Shares @ $15/s	Sept: 100 Shares @ $9/s
Net Invested	$3,900.00	$2,700.00
Ending Value	$3,300.00	$3,300.00
Net Change	-$600.00	$600.00
	Investor 1 Returns	**Investor 2 Returns**
Time Weighted (TWR)	10.00%	10.00%
Money Weighted (IRR)	-24.81%	35.04%
Return on Investment (ROI)	-15.38%	22.22%

If performance cannot be calculated for a period within the report timeframe, graphs will display a flat line and returns will display "N/A" or "—". For third party advisory programs (TMP), and outside custodians (CST), the above-noted performance calculations may differ from the methodologies used at the current or prior firm or custodian.

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Income: Projected income totals shown are estimated and are rounded to the nearest dollar. Total values may reflect rounding discrepancies. If information is not available to calculate income on certain securities, those income generating securities will not be displayed on the report.

Money Market Funds: Money market fund investments are not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Although the funds seek to preserve a value of $1.00 per share, it is possible to lose money in money market funds.

Underlying Investment Type: The underlying investment type categorization is a high level grouping of securities meant to provide a basic breakdown of your investment vehicles. To the degree possible, this categorization breaks down the investments that underlie your investment vehicles rather than showing the vehicles themselves. For example, rather than classifying mutual funds as "mutual funds" when grouped by underlying investment type, this Report may record your investment as 60% "equity" and 40% "debt" since that is the underlying makeup of the funds.

Underlying mutual fund allocations are not disclosed with high regularity and as such underlying allocation information used on reports can be 6 months old or older. At times, complete information pertaining to the makeup of certain funds will not be available. In these cases, allocations will either be adjusted to reflect a 100% makeup or the fund in question will be considered to be classified as "other".

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Pre-June 2000 Data Not Available for Performance: Performance for LPL accounts is not available at the account, position, asset class, or security level prior to June 2000. Generally, performance for assets held directly with the sponsor is not available prior to May of 2010.

Young & Healthy, Inc.
Balance Sheet - Cash
As of April 30, 2022

	Apr 30, 22	
ASSETS		
Current Assets		
Checking/Savings		
Citizens Bank Checking	469,988.16	
Investment for Reserve	796,225.72	
Pay Pal	847.30	
Total Checking/Savings		1,267,061.18
Accounts Receivable		
Accounts Receivable	186,848.75	
Total Accounts Receivable		186,848.75
Other Current Assets		
Allowance for Uncollect Prom	-4,000.00	
Discount Future Val. of Pledges	-2,602.00	
Total Other Current Assets		-6,602.00
Total Current Assets		1,447,307.93
Fixed Assets		
***Accumulated Depreciation**		
Computers/Equip.-Acc.Depr.	-67,981.92	
Furniture and Fixtures-Acc.Depr	-51,803.00	
Leasehold Improvements-Acc.Depr	-57,449.08	
Software-Accum.Deprec.	-36,204.00	
Total *Accumulated Depreciation		-213,438.00
Computers/Equipment		141,927.11
Furniture and Fixtures		85,856.03
Leasehold Improvements		75,264.86
Software		40,558.57
Total Fixed Assets		130,168.57
TOTAL ASSETS		**1,577,476.50**
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Credit Cards		
CapitalOne Visa	1,288.98	
Total Credit Cards		1,288.98
Other Current Liabilities		
Payroll Holding Account	-780.01	
Vacation Accrual	36,956.83	
Total Other Current Liabilities		36,176.82
Total Current Liabilities		37,465.80
Total Liabilities		37,465.80
Equity		
Temp. Restricted Net Assets		279,370.00
Unrestricted Net Assets		910,154.51
Net Income		350,486.19
Total Equity		1,540,010.70
TOTAL LIABILITIES & EQUITY		**1,577,476.50**

Advanced Tracking
5.9.22

Budgeted Foundation Revenue	Budget	Additional	Committed	Expected	Committed + Expected	Var. Committed to Budget	Var Commited + Exp to Budget	Month of Receipt
Ann Peppers	$ 30,000		$ 25,000		$ 25,000	$ (5,000)	$ (5,000)	Sept
Annenberg Foundation	$ 50,000					$ (50,000)	$ (50,000)	March
Anonymous Foundation	$ 30,000		$ 30,000		$ 30,000	$ -	$ -	Sept
Arcadia Association of REALTORS	$ 2,500		$ 2,000		$ 2,000	$ (500)	$ (500)	Dec
Burke Foundation	$ 3,000			$ 3,000	$ 3,000	$ (3,000)	$ -	June
Carl Wynn Foundation	$ 4,000		$ 5,000		$ 5,000	$ 1,000	$ 1,000	Oct
Connell Foundation	$ 25,000			$ 25,000	$ 25,000	$ (25,000)	$ -	June
First Cong Church	$ 25,000		$ 10,000		$ 10,000	$ (15,000)	$ (15,000)	Dec
Green Foundation	$ 50,000		$ 55,000		$ 55,000	$ 5,000	$ 5,000	Nov
Kaiser Foundation	$ 95,000		$ 100,000		$ 100,000	$ 5,000	$ 5,000	June
Laemmle Charitable Fdn	$ 2,500		$ 2,500		$ 2,500	$ -	$ -	Dec
Lions Club	$ 4,000		$ 4,000		$ 4,000	$ -	$ -	March
Parsons Foundation	$ 50,000		$ 50,000		$ 50,000	$ -	$ -	March
Pasadena Respiratory Health	$ 50,000		$ 80,000		$ 80,000	$ 30,000	$ 30,000	Dec
Patron Saints Foundation	$ 35,000			$ 35,000	$ 35,000	$ (35,000)	$ -	June
Pfaffinger Foundation	$ 15,000		$ 40,000		$ 40,000	$ 25,000	$ 25,000	Oct
QueensCare	$ 35,000		$ 35,000		$ 35,000	$ -	$ -	
Rose Hills	$ 50,000		$ 50,000		$ 50,000	$ -	$ -	Nov
Rotary Club of Pasadena	$ 2,000					$ (2,000)	$ (2,000)	April
Silent Partners	$ 5,000		$ 10,000		$ 10,000	$ 5,000	$5,000	Dec
TOMA Grant	$ 130,000		$ 132,837		$ 132,837	$ 2,837		Qtr
Total	$ 693,000	$ -	$ 631,337	$ 63,000	$ 694,337	$ (61,663)	$ (1,500)	
Unbudgeted Pending							$ -	
Shay, Edward & Al		$ 40,000						
Gesner Johnson Foundation		$ 45,830				$ -		
Total	$ -	$ 85,830				$ -		
Unbudgeted Committed						$ -		
CHAP			$ 10,000		$ 10,000			
Lendistry - COVID Sm Business grant			$ 25,000		$ 25,000			
Lluella Morey Murphy			$ 15,000		$ 15,000			
Pasa. After Hours Rotary			$ 2,000		$ 2,000			
Pasadena Child Health Foundation			$ 10,000		$ 10,000			
Pasadena Community Foundation			$ 10,000		$ 10,000			
So Pasadena Prayer Breakfast			$ 1,500		$ 1,500			
Total	$ -	$ -	$ 73,500		$ 73,500	$ -		
Grand Total	**$ 693,000**	**$ 85,830**	**$ 704,837**	**$ 63,000**	**$ 767,837**	**$ (61,663)**	**$ (1,500)**	
Capital								
Ahmanson Foundation			$ 46,000		$ 46,000			

Operating and Capital Cash Flow
2021-2022

Young & Healthy	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projected	Projected	Projected	Budget	Variance
2021-2022 Operating and Capital Cash Flow	**July**	**Aug**	**Sept**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**April**	**May**	**June**	**2021-2022**	**2021-2022**	**2021-2022**
Revenue Projected	**$86,845**	**$77,183**	**$67,289**	**$75,928**	**$216,736**	**$335,469**	**$45,637**	**$75,222**	**$227,968**	**$49,545**	**$95,212**	**$324,868**	**$1,677,903**	**$1,404,600**	**$273,303**
Foundations	$40,000	$25,000	$25,000	$63,378	$170,000	$94,500	$3,333	$43,281	$0	$37,000	$53,344	$213,000	$767,837	$693,000	$74,837
Contribution Income	$1,018	$9,789	$1,242	$893	$20,970	$62,711	$15,061	$5,593	$32,146	$9,893	$35,083	$25,083	$219,481	$162,000	$57,481
Events	$45,827	$42,393	$41,047	$11,657	$25,766	$178,259	$27,244	$26,348	$195,822	$2,652	$6,785	$86,785	$690,585	$549,600	$140,985
Expenses Projected	**$97,268**	**$111,326**	**$106,910**	**$97,646**	**$92,451**	**$94,751**	**$127,772**	**$124,735**	**$209,575**	**$114,507**	**$167,033**	**$185,026**	**$1,529,001**	**$1,418,205**	**$110,796**
Staff Costs	$75,355	$103,249	$84,582	$68,959	$71,611	$77,192	$79,812	$106,818	$74,254	$78,466	$76,022	$116,061	$1,012,383	$994,019	$18,364
Contract Services	$17,927	($4,279)	$8,717	$9,368	$8,571	$8,581	$9,318	$8,665	$18,081	$25,322	$67,849	$8,650	$186,771	$171,298	$15,473
Event Costs	$600	$5,225	$3,392	$795	$0	$0	$500	$657	$35,184	$500	$4,000	$33,148	$84,000	$83,500	$500
Gen. Op	$3,386	$7,131	$10,219	$18,524	$12,269	$8,978	$21,142	$8,595	$82,057	$10,218	$19,161	$20,500	$222,180	$141,443	$80,737
2% Contingency	$0	$0	$0	$0	$0	$0	$17,000	$0	$0	$0	$0	$6,667	$23,667	$27,945	($4,278)
Operating Surplus/(Deficit)	**($10,423)**	**($34,144)**	**($39,621)**	**($21,718)**	**$124,285**	**$240,718**	**($82,135)**	**($49,512)**	**$18,393**	**($64,962)**	**($71,820)**	**$139,842**	**$148,902**	**($13,605)**	**$162,507**
Capital Expenditures (net of grants)	$0	$0	$0	($1,856)	$0	($1,279)	($3,233)	$14,786	$0	$0	$0	$0	$8,418	$7,000	$15,418
Capital Expenditures	$0	$0		($1,856)		($1,279)	($3,233)	($31,214)	$0		$0	$0	($37,582)	$7,000	($30,582)
Capital Grants	$0	$0	$0	$0	$0	$0	$0	$46,000	$0	$0	$0	$0	$46,000	$0	$46,000
Net Cash Flow Gains/Losses	**($10,423)**	**($34,144)**	**($39,621)**	**($23,574)**	**$124,285**	**$239,439**	**($85,368)**	**($34,726)**	**$18,393**	**($64,962)**	**($71,820)**	**$139,842**	**$157,319**	**($20,605)**	**$177,924**
Recommended 2022/23 Expenses Pre Payments							Mobile Dental Clinic $55,000 + Morris & Berger $33,000 + Change Manger $5,200					**$93,200**	**$93,200**		
TOTAL NET CASH FLOW													**$64,119**		

2022-2023 Revenue Assumptions
DRAFT

Requests		Projected Revenue	
Foundations		**$ 776,500**	
Corporations		**$ 1,000**	
***Individuals**		**$ 554,414**	
TIC Revenue		**$ 90,000**	
Other		**$ 6,000**	
Grand Total		**$ 1,427,914**	
	***Breakdown of Individual Revenue**		
	Events:	**Revenue**	Notes:
	It's Possible	$ 40,000	
	Gala 2022	$ 325,000	
	Direct Mail:		
	Annual Appeal	$ 92,000	Direct mail & on-line
	Spring Appeal	$ 40,000	Direct mail & on-line
	Other Gifts:		
	Individual Gifts	$ 53,014	
	Multi-Yr Pledge Billing	$ 4,400	
	Total	**$ 554,414**	

Revenue Budget
2022-2023
DRAFT

Budgeted Foundation Revenue					
Budgeted Foundations	2021-2022 Budget	Committed/ Expected 2021-22	2022-2023 Budget	Comments	
After Hours Rotary		$ 2,000	$ 2,500		
Ann Peppers	$ 30,000	$ 25,000	$ 30,000	Yearly grant	
Annenberg Foundation	$ 50,000		$ 50,000	New grant cycle	
Anonymous Foundation	$ 30,000	$ 30,000	$ 30,000	Yearly grant	
Arcadia Association of REALTORS	$ 2,500	$ 2,000	$ 2,000	Yearly grant	
Burke Foundation	$ 3,000	$ 3,000	$ 3,000	Yearly grant	
Carl Wynn Foundation	$ 4,000	$ 5,000	$ 5,000	Yearly grant	
Connell Foundation	$ 25,000	$ 25,000	$ 25,000	New grant cycle	
First Cong Church	$ 25,000	$ 10,000	$ 25,000	New grant	
Good Hope Medical Foundation			$ 50,000	New grant cycle	
Green Foundation	$ 50,000	$ 55,000	$ 50,000	New grant cycle	
Kaiser Foundation	$ 95,000	$ 100,000	$ 100,000	New grant cycle	
Laemmle Charitable Fdn	$ 2,500	$ 2,500	$ 2,500	Yearly grant	
Lions Club	$ 4,000	$ 4,000	$ 4,000	Yearly grant	
Lluella Morey Murphy		$ 15,000	$ 10,000		
Parsons Foundation	$ 50,000	$ 50,000		New grant cycle	
Pasadena Respiratory Health	$ 50,000	$ 80,000	$ 50,000	Yearly grant	
Patron Saints Foundation	$ 35,000	$ 35,000	$ 35,000	Yearly grant	
Pfaffinger Foundation	$ 15,000	$ 40,000	$ 15,000	Yearly grant	
QueensCare	$ 35,000	$ 35,000	$ 70,000	New grant cycle	
Rose Hills	$ 50,000	$ 50,000	$ 50,000	New grant cycle	
Rotary Club of Pasadena	$ 2,000	$ -		New grant cycle	
Satterberg Foundation			$ 30,000	New grant cycle	
Silent Partners	$ 5,000	$ 10,000	$ 10,000	Yearly grant	
TOMA Grant	$130,000	$ 132,837	$ 130,000	3-Yr grant w/Day One	
Total	$ 693,000	$ 711,337	$ 776,500		
Unbudgeted Committed					
CHAP		$ 10,000			
Lendistry - COVID Sm Business grant		$ 25,000			
Pasadena Community Foundation		$ 10,000			
Pasadena Child Health Foundation		$ 10,000			
So Pasadena Prayer Breakfast		$ 1,500			
Total		$ 56,500			
Grand Total	$ 693,000	$ 767,837	$ 776,500		

YOUNG & HEALTHY

BUDGET SUMMARY 2022 - 2023

Revenue:	**$1,427,914**
Expenses:	**$1,427,914**
Operating Surplus/(Deficit)	**$ 0**
Total Budget	**$1,427,914**
Planned Spending from Investment Reserve	**$ 50,000**

Pre Payments Fiscal Year-End 21/22	
Mobile Dental Clinic	$55,000
Morris & Berger	$33,000
Change Manager WKSP 2	$ 5,200
	$93,200

Revenue Projections: Increase by 1.7% ($23,314) from Last Fiscal Year

Primary revenue categories of Fiscal Year 2021-2022: Gala ($325,000), Foundations ($776,500), and $132,000 for direct mail and online appeals were developed with and approved by the Development Committee.

Risks/Opportunities

Risk:

- Meeting foundation revenue goals
- Gala – High revenue projection

Opportunities:

- Direct Mail appeals have continued to produce increased revenue year over year

Expense Projections: Increase by 2.2% ($30,655) from Last Fiscal Year

Bottom up build of each category of expense, including comparison to 2021-2022 projected year end results.

Explanation:

- Increase in staffing costs
  - Increase due to staffing/payroll adjustments, projected benefits/insurance and tax increases.
  - 25% Salary increase for new Executive Director (9 months)
  - Retirement package and accrued unused vacation for Development Director
  - Social Worker, new position only if grant supported
  - 3% Cost of living increase for staff
- Increases in Direct/Allocated Costs
  - Contract Services; Mobile Dental Clinic, IT, and grant writer. Program Consultant fee - 4 months
  - Accounting; Grant Management Consultant

YOUNG AND HEALTHY
Organizational Budget
Fiscal Year 2022-2023

Revenue			
Foundations		$	776,500
Corporations		$	1,000
Individuals		$	554,414
TIC Revenue		$	90,000
Other		$	6,000
	TOTAL PROJECTED REVENUE	**$**	**1,427,914**
Personnel			
Gross Salaries		$	865,729
Payroll taxes		$	58,291
Workers' Compensation		$	6,085
Benefits		$	129,149
Payroll services		$	5,740
	Subtotal Personnel	**$**	**1,064,995**
Program Support and Operational			
Conferences/Education		$	6,089
Dues/Subscriptions		$	6,665
Evaluation		$	22,000
Travel and Mileage		$	2,500
Postage and Shipping		$	3,500
Printing and Reproduction		$	9,125
Consumable Office Supplies		$	4,500
Program Supplies		$	20,400
Event Expenses		$	86,000
Contract Services		$	116,805
Alma Stokes Healing Fund		$	3,000
Meetings		$	6,165
Marketing		$	8,700
Telephone and Communications		$	7,000
Equipment Maintenance		$	2,500
Insurance		$	11,220
Credit Card Processing Fee		$	10,000
Audit		$	18,500
Accounting		$	13,750
Office Maintenance		$	4,500
	Subtotal Program and Operational	**$**	**362,919**
	TOTAL ORGANIZATIONAL EXPENSE	**$**	**1,427,914**
	TOTAL BUDGET	**$**	**1,427,914**
	Cash Surplus/(Deficit)	**$**	**0**
	Planned Spending from Investment Reserve	**$**	**50,000**

Consent Agenda - Program

National Volunteer Week

Bundt cake gratitude was back in person after a two-year Covid-Hiatus. An army of volunteer bakers, another battalion for delivery volunteers and an amazing staff got over 250 Bundt Cakes out the door in a few hours to show sweet love to our Volunteers.

Tax Season-Year Two

Young & Healthy became certified by the IRS to become a VITA site----an incredible feat to get this certification!

Between our partner VITA cite at Cal State LA and our own site we:

- Provided Tax Service to 220 individuals
    - Total Federal refunds-$287,894 ($29.5446 was EITC)
    - Total State refunds ----$53,238 ($112,316 was ETIC)
- **A whopping grant total of $ 341,132 back to clients.**

Meeting Handouts

Strategic Plan Update

Please click on the link below to check on the status of the Strategic plan.

If the cell is in green, then the objective is complete. Yellow means it is in process and red means we need input from either the Board, a Board Committee, or senior staff leadership.

YH Strategic Plan Implementation Tracking 03_14_2022.xlsx

Young & Healthy Board & Committee Meeting Schedule 2022- 2023			
Meeting	**Date**	**Time**	**Location**
Full Board Retreat	TBA	TBA	
Full Board	Wednesday, September 28, 2022	6:00 PM - 8:00 PM	Y&H Office
Full Board	Wednesday, December 7, 2022	6:00 PM - 8:00 PM	Y&H Office
Full Board	Wednesday, February 1, 2023	6:00 PM - 8:00 PM	Y&H Office
Full Board	Wednesday, April 5, 2023	6:00 PM - 8:00 PM	Y&H Office
Full Board	Wednesday, May 24, 2023	6:00 PM - 8:00 PM	Y&H Office
Annual Meeting	Friday, June 16, 2023	TBD	TBD
Executive Committee-MINI RETREAT	Thursday, September 1, 2022	6PM	Sandy's House
Executive Committee	Friday, November 4, 2022	8:30 AM - 9:30 AM	Zoom
Executive Committee	Friday, January 6, 2023	8:30 AM - 9:30 AM	Zoom
Executive Committee	Friday, March 3, 2023	8:30 AM - 9:30 AM	Zoom
Executive Committee	Friday, May 5, 2023	8:30 AM - 9:30 AM	Zoom
Executive Committee-if needed	Friday, June 2, 2023	8:30 AM - 9:30 AM	Zoom
Finance Committee	Friday, September 16, 2022	3 pm	Zoom
Finance Committee	Friday, November 18, 2022	3 pm	Zoom
Finance Committee	Friday, January 20, 2023	3 pm	Zoom
Finance Committee	Friday, March 17, 2023	3 pm	Zoom
Finance Committee	Friday, May 12, 2023	3 pm	Zoom
Development Committee	Monday September 12, 2022	12:00 - 1:00 PM	Zoom
Development Committee	Monday November 14, 2022	12:00 - 1:00 PM	Zoom
Development Committee	Tuesday January 10, 2023	12:00 - 1:00 PM	Zoom
Development Committee	Wednesday, March 8, 2023	12:00 -1:00 PM	Zoom
Development Committee	Wednesday, May 10, 2023	12:00 - 1:00 PM	Zoom
Strategic Planning Committee	TBD	TBD	TBD
Strategic Planning Committee	TBD	TBD	TBD
Strategic Planning Committee	TBD	TBD	TBD
Strategic Planning Committee	TBD	TBD	TBD
Governance Committee	Tuesday, September 13, 2022	6 pm	TBD
Governance Committee	Tuesday, November 8, 2022	6 pm	TBD
Governance Committee	Tuesday, January 17, 2023	6 pm	TBD
Governance Committee	Tuesday, March 14, 2023	6 pm	TBD
Governance Committee	Tuesday, May 16, 2023	6 pm	TBD
Mobile Dental Clinic	Monday Oct 10 - Friday October 21, 2022	TBD	Blair
Gala	Saturday February 4, 2023	TBD	TBD
It's Possible	May 17, 2023	TBD	TBD