



2018 S.L. Gimbel
Foundation Fund
Grant Application

Internal Use Only:	
Grant No:	20190105

Organization / Agency Information

Organization/Agency Name: Big Brothers Big Sisters of the Inland Empire		
Physical Address: 2155 Chicago Avenue, Suite 100 Riverside, CA 92507		
Mailing Address: 2155 Chicago Avenue, Suite 100 Riverside, CA 92507		
CEO or Director: Jennifer O'Farrell		Title: Executive Director
Phone: 909-763-5959	Fax: 909-303-2680	Email: 951-283-9305
Contact Person: Jennifer O'Farrell		Title: Executive Director
Phone: 909-763-5959	Fax: 909-303-2680	Email: JOFARRELL@IEBIGS.ORG
Web Site Address: www.iebig.org		Tax ID: 95-1992702

Program / Grant Information

Interest Area: Animal Protection Education Environment Health Human Dignity

Program/Project Name: The Road to Success: Advocates for Trauma Intervention for Girls			Amount of Grant Requested: \$25,000
Total Organization Budget: \$1,011,211.29	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 80%	Per 990, Percentage of Management & General Expenses Only (Column C/ Column A x 100): 9%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 19%
Purpose of Grant Request (one sentence): To create direct intervention into girls lives in order to build self-esteem, develop life-skills and prevent and/or break high-risk behaviors through a positive role model.			
Program Start Date (Month and Year): 1/1/2019		Program End Date (Month and Year): 12/31/2019	
Gimbel Grants Received: List Year(s) and Award Amount(s) n/a			

Signatures

Board President / Chair: (Print name and Title) Matt Stowe, Chairman of the Board	Signature: 	Date: 12-7-18
Executive Director/President: (Print name and Title) Jennifer O'Farrell, Executive Director	Signature: 	Date: 12/16/2018

2018 S.L. Gimbel Foundation Fund APPLICATION

Narrative

I. Organization Background

Founded in 1904, Big Brothers Big Sisters of America (BBBSA) has developed a brand that is widely recognized across the nation, and implements a highly structured and sophisticated, evidence-based model for mentorship. Big Brothers Big Sisters of the Inland Empire (BBBSIE) formed in 2013 through the expansion of service area by Big Brothers Big Sisters of Orange County (BBBSOC), which has been in operation for over 60 years. The mission of BBBSIE is to provide children ages 6-18 facing adversity with strong and enduring professionally-supported, one-to-one mentoring relationships that changes their lives for the better, forever.

In 2013, Big Brothers Big Sisters of Orange County (BBBSOC), which has been in operation for 60 years, formed Big Brothers Big Sisters of the Inland Empire (BBBSIE) recognizing the opportunity gap of a safe, reliable mentoring program for the region. Through regional stakeholders, like donors, community organizations, law enforcement and education agencies, Orange County and the Inland Empire came together to offer the mentoring services to both counties. Although the agencies have a consolidated audit and financials, BBBSIE runs regionally independent and is locally funded. In five years, BBBSIE has served twice the projected number of at-risk youth and is currently mentoring over 1,000 youth in Riverside and San Bernardino Counties. BBBSIE is governed by its own 41-member Regional Advisory Board, with a diverse board reflective three areas of the region.

We carry out our mission by:

- preventing and defending the potential and vulnerability of youth ages 6-18 (Littles) with an adult or peer mentoring friendship that is consistent, ongoing, supportive, educational, safe and fun;
- equipping mentors (Bigs) with training, resources and support needed to be effective mentors; and
- enhancing the ongoing friendship (Match) with case management support, resources, enrichment activities and asset-building opportunities.

Organizational Accomplishments:

In just under four years of service, BBBSIE has successfully implemented its services across the region and made a positive impact for 950 at-risk youth of the Inland Empire, double our projection. We are on the Road to 1,000 served and retained by 2019.

The BBBSIE Community and School-Based Mentoring Programs have continued to build momentum through established strong partnerships with Alvord, Corona-Norco, Riverside, Murrieta Valley, Chaffey Union and San Bernardino City Unified School Districts. Our programs provide tremendous added value through increased student attendance, academic achievement and personal confidence.

In under five years of service, BBBSIE has successfully implemented the Road to Success One-to-One Mentoring Program across the region for over 1,000 at-risk youth, double our projection. Jennifer O'Farrell continues her 4th year as Executive Director and leads a staff of 21 employees, and a 41-member, 3 region Board of Directors. After a year of being matched with a positive role model, students

are found to be less likely to skip school, use drugs or alcohol, and more likely to graduate high school. This past year 100% of children refrained from gang activity and 99% graduated from high school. BBBSIE has successfully implemented its one-to-one service model of mentoring across the region, targeting youth least likely to organically have a mentor, and creating generational change in over 1,000 at-risk youth ages 6-18 in Riverside and San Bernardino Counties. Our one-to-one mentoring programs are pillars to support the growing opportunity gap that foster, impoverished and disenfranchised children face. The children we serve represent single parent or guardian households living under the federal poverty guidelines and statistically are 90% likely to run away from home (leading to more vulnerability and exploitation), 90% are represented in the juvenile justice system, and 71% drop out from high school. Additionally, girls growing up in households with one parent and in poverty are 63% of teen suicides and 30% of teenage pregnancies, increasing their chances to remain in poverty or deceased.

Because of a professionally supported mentor, this life of pain and frustration can be avoided for these youth because it's also proven that when BBBS connects these youth to a mentor: 83% increase in an academic subject, 100% of our youth refrained from gang and criminal involvement, and 99% of our youth graduated high school on time giving a child the true chance to succeed. As a result of our agency's accomplishments, BBBSIE received awards from Riverside and Corona- Norco school districts, the HOPE Collaborative and is a finalist for the 2018 The Spirit of the Entrepreneur awards.

We hope each child in our program achieves:

- 1) Higher aspirations, greater confidence, and better relationships with adults/peers;
- 2) Avoidance of risky behaviors that lead to criminal activity; and
- 3) Educational success and attainment

Program Activities:

We offer two types of mentoring models throughout the metro areas of Riverside and San Bernardino Counties that are both evidence-based with proven national and local outcomes that transform the lives of at-risk children:

- 1) Our Community-Based Mentoring Program is designed whereby adult volunteers (Bigs) are matched 1:1 with at-risk youth (Littles) ages 6-18 from Riverside and San Bernardino counties based on gender, common interests and compatibility. Bigs commit to mentoring for at-least one year. The School-Based Mentoring Program matches qualified high school students with elementary school children during the school year. The two primary goals are to 1) promote healthy youth development by providing emotional, academic, and social support through one-to-one mentoring, and 2) strengthen the skills of the high school mentors, because they have the potential to become future community volunteers and leaders. We currently serve over 476 children and youth throughout the Inland Empire.
- 2) Site-Based Mentoring Models: Our Bigs meet their Littles weekly to monthly at a designated site location (school, business, community center) facilitated by BBBS staff in two different service models. High School Bigs focuses on matching qualified high school volunteers with counselor and principal referred elementary school youth. The goal is to promote healthy youth development by providing emotional, academic, and social support through one-to-one peer mentoring and empowering high school Bigs as they become future community leaders. We currently host 21 sessions at 15 elementary school sites in 5 school districts. Workplace Mentoring provides youth with an educational, vocational and cultural program while being mentored at a corporate office by the employees at that corporation, providing an opportunity for youth to receive a unique experience outside of the classroom, gaining job skills, and learning about educational and career experiences.

II. Project Information:

A) Statement of Need

Based on our intake process records region-wide, 75% of our families come from single parent households and 75% of family's report household income of \$35,000 or less, for an average family of five. Overall, 95% of our families we serve are below the federal poverty level, 31% have had an incarcerated parent, and the average ACE score is 2.3 with the highest being 8. The ACEs study demonstrates the life-long impact (individually and societal) childhood trauma has on a person and offers indicators where life-long victimization and domestic abuse (financial, physical, emotional) can be mitigated with intervention based on that child's social capital or their network to allow them to build new worldview and skills to move them from trauma to success. A Big Sister mentor can provide preventative, systemic, long-term behavioral change in the girls we serve.

We learned through two sets of focus groups with our mentors that there are countless layered needs impacting the health, behaviors and academic success of our Littles, especially variants of abuse.

The Advocates for Intervention Survey Data (2017-2018) /Percentage of Total Youth assessed from our Traditional Program: 238

-29% Low-levels of abuse: Children live under the federal poverty level, have a stable household and are coming to the program for extra support not related to abuse or trauma. Solution - Coaching (tools and training to mentors)

-45% Mid-levels of abuse: Children are at risk because they have been exposed to drugs, violence, abuse, single parent household, very low income or live with grandparents. Most common abuse they are exposed to is domestic, gang neighborhoods, and sexual abuse. Solution - Collaboration (work alongside case manager)

-26% High-Levels of abuse: Children live under the federal poverty level, have experienced one or more of physical, verbal or sexual abuse, are homeless, in the foster care system or have had significant trauma in their lives. Solution - Crisis (urgent response by team and Mentor)

The earlier children with trauma are identified, the sooner the potential and adverse consequences can be minimized.

The following are some common life experiences children in our program are facing or backgrounds they come from: •Single parent households or one or both parents deceased •In custody of foster parents, extended family members, or in a group home •Alcohol/Substance Abuse of a parent •Criminal involvement of parent, sibling or other relatives •Cultural/Language Barriers •Emotional or psychological disorders •Family Violence (55% report on their application having been exposed to domestic violence, and/or physical, sexual, emotional abuse, and neglect.) •Homelessness •Low Educational Attainment of parent (74% of parents/guardians did not graduate from high school) •Neighborhood Violence •Overcrowding in Household (Many families live doubled and tripled up)

B) Project Description

Our Road to Success: Advocates for Trauma Intervention for Girls mentoring program is part of our Community-Based Mentoring Model in which Big Sister mentors are carefully screened and strategically matched one-to-one with an at-risk girl based on common interests and compatibility. Once paired, each Match commits to meeting up to 24 hours a month for a minimum of one year. Our one-to-one mentoring has short-term outcomes that are: 1) relationship building, 2) helping establish the foundation for basic agreements of responsibility, and 3) accountability and respect. This is soon followed by the mentor and mentee sharing stories, listening and discovering shared experiences. Through their mentorship, the mentees can begin to discover a voice in which they are central, and this helps them cope better. The confidence mentorship helps to develop is the best defense against preventing the helplessness of trauma

or other challenges the youth are dealing with. Through our case management process and the intervention of the mentors, we are also able to identify those families that are in the greatest need, and provide them with resources outside of our agency that can support their challenges. Many mentors have been able to identify situations that are extreme, such as cases of abuse, neglect or when basic needs, such as food, clothing and shelter are not being met.

The enhanced Road to Success: Advocates for Trauma Intervention for Girls program specifically identifies girls exposed to risk factors of abuse, violence or trauma. In response to reports from our volunteer mentors and case managers last fiscal year, we are purposefully enhancing intervention tools and family-life resources for the girls by introducing training for case management in order to guide new methods for defining intervention, as well as incorporating the ACEs survey into our youth enrollment process to help find root causes of trauma and then anticipate behavioral change. Many of our participants and/or a family member are facing risk factors associated with extreme negative outcomes, such as school failure, psychiatric illness, criminal involvement, poor social relationships, family instability and social isolation. Many possess risk factors researched in the ACEs Study, which demonstrates the lifelong impact that childhood trauma has on a person.

BBBSIE's current support model is effective for the 29% of the caseload of children with ACE scores at zero (0). The enhancement model will reduce burn out of volunteers, increase match retention and increase child stability by intervening with additional wrap-around resources and support to break cycles of poverty and victimization to the 71% of the caseload impacted by serious trauma.

This program is innovative because instead of responding to a child's behavior, we intervene and prepare the mentor to intervene to their Little with trauma informed care. The key is knowing the ACE scores of our children to better aid staff in understanding the severity of trauma and equipping staff with an adequate caseload, as well as the training to ensure that the team has proactive solutions to the potential challenges and realities our mentors and mentees face.

C) Project Goal, Objectives, Activities & Expected Outcomes

Project Goal:

To identify all girls ages 6-18 in our traditional community based mentoring program who have been exposed to risk factors of abuse, violence or trauma.

Project Objectives:

To intervene in the lives of girls who have been subjected to any form of trauma in order to improve the match length, and as a result build self-esteem, develop life-skills and prevent and/or break high-risk behaviors.

Program Activities:

1) Traditional Community-Based Mentoring Model: Our Big Sisters are carefully screened and strategically matched one-to-one with an at-risk youth girl with common interests and compatibility. Once paired, each Match commits to meeting up to 24 hours a month for a minimum of one year. This match is organic in nature and their activities and time together take place in the community. We provide each Match a caseworker, specialized training to the volunteers and host agency activities throughout the year to build retention and peer support. We currently serve over 476 children and youth throughout the Inland Empire.

For the past three years, we have been tracking the rate of childhood trauma affecting youth accepted into our programs; 35% report in application having experienced or been exposed to abuse, violence or neglect, with the interview reflecting closer to 70%. With proper training, mentoring is an effective tool to buffer the impact of childhood trauma on long-term wellness outcomes. We have implemented trauma-informed care training for our case management staff and they work directly with mentors to understand the impact of trauma so they can provide support for their mentees. LGBTQ youth are particularly at risk for experiencing trauma, and in the past two years we have helped lead national efforts to implement best practices for supporting LGBTQ youth mentoring.

Trauma-informed mentoring has three elements:

1. Recognition: We use surveys and extensive interviewing as part of our intake process to better understand how trauma and its effects impact Littles enrolling in our program. During interviews with mentors, we assess their own life experiences and ability to work with children facing more significant challenges. We have recently updated our intake survey and have begun to collect ACEs (Adverse Childhood Experience) data and scores for all Littles entering our program.

2. Match Support Training: Our staff currently receives annual training on recognizing and addressing trauma in children. With an investment from the S.L. Gimbel Foundation, we can dramatically upgrade our ability to provide stronger case management support, inclusive of at-risk girls. Our Assistant Director of Programs (ADP) will attend a 3-day conference to better implement policies and practices that help youth develop resiliency, self-management techniques, responsible decision-making, and relationship skills that are key to buffering the effects of childhood trauma. The ADP will hold monthly 2-hour trainings (48 hours total) with BBBSIE Match Support Staff on recognizing trauma best practices for support, and access to additional resources/referrals. Monthly trainings will update progress on individual case workplans for trauma-impacted Littles. The ADP will also identify an outside expert to provide an intensive half-day (4 hour) workshop for all staff by the end of 2019. This support will be layered upon the ongoing LGBTQ training and support we provide for staff, families, and mentors. Match Support Staff will receive at least 50 total hours of intensive training over 13 sessions.

3. Mentor support: The most crucial element of our work is to improve the support we provide for mentors/Big Sisters. Mentors provide the core stable and nurturing mentoring relationship that blunts the impact of adverse childhood experiences. Trained staff will help volunteer mentors understand the importance of trusting relationships... a foundation for providing care. On this foundation, staff will work with mentors through monthly case management support to help instill self-regulation, self-reflection, and self-confidence in the children and youth. We will also develop and share a trauma-informed mentoring resource (discussion of impact, how to work with trauma-impacted youth, referral and resources) for every mentor in our program. Mentors will receive 4-8 hours of trauma-informed case management support, depending on need.

Expected Outcomes:

1) After year one, due to intervention, our total match closure percentage will be reduced compared to 2018 closure rate.

- 2) During the grant period, 100% of girls will be assessed with the ACE survey and categorized into Crisis, Collaboration and Coaching case management level categories with Youth Outcome Development Plans (YODP) for each girl.
- 3) During the grant period, mentors will receive access to additional trainings and more intense case management related to ACE scores.
- 4) Improvement in at least two of the YOS measurements.

Evaluation:

- 2) Our Youth Outcome Survey (YOS) annually demonstrates the positive impact mentoring provides to our at-risk population of youth. Mentored children show improvement in self-esteem, confidence in their school work and even show modest gains in their GPA. They feel a great sense of direction for their future and have better relationships with parents, peers and other adults. In some cases, mentoring has shown to have the strongest effect on minority youth. The YOS is administered to the youth in the program on a pre/post basis. The results from the baseline survey are compared to a follow-up survey, which is administered at the end of the year. The YOS aims to measure changes in the child's perception of social acceptance, scholastic competency, educational expectations, risk taking attitudes, parental and special adult relationships, and grades/attendance, and juvenile delinquency/arrest. Through the YOS, BBBS agencies have consistently observed the growth and improvement of the youth mentored.
- 3) Youth Outcome Development Plans (YODP): Youth Outcome Development Plans (YODP) are made together by the mentor, child and BBBSIE staff. Implemented a year ago, the YODPs focus on improving specific areas of each Littles' YOS over the course of the year through specific action plans decided on by their Big and Program Specialist. With a higher priority placed on intervention into matches that are categorized as Crisis and/or Collaboration, our expected YODP outcomes will show measurements that "maintain or improve" in a minimum of three major categories.

D) Timeline

Provide a timeline for implementing the project. State the start date and ending date of the project, include timeframes for specific activities, as appropriate.

BBBSIE's Road to Success: Advocates for Trauma Intervention for Girls is year-round and consists of an extensive intake and assessment process, incorporating thorough background screenings of volunteer mentors, determining which volunteer is best suited for a particular child. Many youth are referred to us from foster care, group homes, or have had intervention with a social worker or service agency. We utilize a customized database for tracking inquiries, applications, and matches yielded. Once matched, each Big commits to spending time with the Little for 2-4 times a month for a minimum of one year. This model of mentoring is organic in nature and is highly dependent on the unique relationship between the Big and the Little. Bigs and Littles have the freedom to engage in and make use of what is in their community, whether it is going to the park or on a hike, visiting a museum, or going to the library and working on a school project. BBBSIE does its part in supporting the match by facilitating trainings, hosting Match Events throughout the year, and providing each match with a Match Support Specialist who is there to help facilitate the match and provide coaching, support and encouragement.

E) Target Population

Who will this grant serve? How many people will be impacted? Provide a breakdown: Number of Children, Youth, Adults, Seniors, Animals.

Youth are referred to our mentoring programs because they have a number of challenges and gaps in their lives that require us to take special care when matching them to positive mentors. The majority of children we serve are living under the federal poverty guidelines and statistically are 90% likely to run away from home (leading to more vulnerability and exploitation), 90% are represented in the juvenile justice system, and 71% drop out from high school.

Currently, in our Traditional Community Based Program, we provide 476 youth with a mentor, and 63% (298) of those are female. Through the intake process, families report their household income and other economic status indicators. Based on our records regionwide, 75% of our families come from single parent households and 75% of the children's families reporting household income are earning an annual income of \$35,000 or less, with an average family size of five. 83% have approved Free/Reduced lunch, indicating low/moderate income levels. Overall, 95% of families we serve fall below the federal poverty level. Demographically, our clients are: 10% African American, 12% Caucasian, 64% Hispanic, 12% mixed race. 32% of Littles have been homeless at some time while in our program.

F) Projects in the Community

How does this project relate to other existing projects in the community? Who else in the community is providing this service or has a similar project? Who are your community partners (if any)? How are you utilizing volunteers?

Our mentoring service is dependent on volunteers. The volunteers in our program are sometimes the first person in the child's life that has not been paid to be apart of their life like their teachers, counselors, probation officers, social workers or afterschool support. Each volunteer serves one child, dedicating their time and talent to ensure their Little reaches their potential.

Our work is uniquely designed to be a pillar of support to school districts, domestic violence centers, counseling centers, homeless shelters/housing programs, local law enforcement, county departments, and community partners. Local youth centers offer a child a safe place after school, yet BBBS offers a person, mentoring friendship to create behavioral changes in the child's life through experiences and trust.

Cal Baptist University (CBU) College of Behavioral Sciences partners us with Masters in Social Work students to provide interns who support the clinical side of our case management and increase match retention. The CBU faculty recognize the unique case management and resources necessary for our MSW interns to serve our youth effectively.

The County of Riverside's Riverside University Health System – Behavioral Health Department provides our case management staff regular trainings, most recently in regard to suicide indicators and prevention.

G) Use of Grant Funds

How will you use the grant funds?

Funding from S.L. Gimbel for our Road to Success: Advocates for Trauma Intervention for Girls will help offset direct service expenses for our Associate Director of Programs who will be trained in Trauma Support, then equip staff with trauma informed care training, personalized mentor training per the needs of their Little (via our Resource Toolkit) analyzing case management quality, and quantifying all youth served with an Adverse Childhood Experience

(ACE) score to ensure proper Youth Outcome Development Plan implementation. This intervention program is an enhancement to our existing evidenced-based model creating stronger case manager advocates, increasing volunteer mentor competencies, and mentoring with a trauma informed care philosophy. Links made from the ACE study recognize that some children need more professional support, crisis intervention, and counseling; AND every child needs one thing above all – some to believe in them, provide opportunity, and support them. The trauma informed care training increases access to comprehensive, quality mental health services for our low-income girls that need swift intervention, counseling, parenting education, social support programs, and needs resources. BBBSIE is backed by independent research that shows when mentors are provided on-going tools, youth are more likely to achieve in school, avoid risky/delinquent behaviors and have higher self-esteem and aspirations.

III. Project Future

A) Sustainability

BBBSIE has a strong track record of securing funding to sustain programs beyond initial pilot stages. The main sources of funding are from grants from corporations, private foundations, and government contracts and fundraising events. Below are examples of programs that sustained after initial funding expired:

Workplace Mentoring was launched in 2015 in partnership with Mathis Brothers Furniture in Riverside. The success of this program has led to our ability to expand corporate partnerships to 4 additional major companies in Riverside and San Bernardino, including Keenan Insurance & Associates, Citizens Business Bank, Amazon and Ontario Reigns serving approximately 100 high school youth annually.

The High School Bigs Mentoring Program was established in Riverside in 2013 and is a professionally supervised, double impact, free after-school program that empowers elementary school aged youth “Littles” and develops future leaders - high school aged volunteer “Big” mentors. We now currently partner in the Inland Empire with 15 elementary schools, 5 school districts with a total of 21 weekly sessions serving nearly 800 elementary and 800 high school students, all within the public school system. The dual impact of supporting high school students has the potential to inspire future community volunteers and develop college-bound youth leaders.

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

A) Governance

BBBSIE has a regional advisory board comprised of 41 community leaders from local businesses, higher education, nonprofit organizations, and government sectors. The regional board has oversight by the BBBSOC governing board of directors. The regional boards meet quarterly with our Executive Director, Jennifer O'Farrell, to focus on local fundraising, operational issues, recruitment and retention strategies, assessment of impact, quality and safety, and develop strategies for current and future plans for long-term success. The Governance Committee meets monthly between regional meetings. The Executive Director currently meets with the board in small committees which focus on expanding the agency's networks in each region, such as an Events Committee, Fiduciary Oversight and Recruitment Committee. The Board votes only on nominations of new board members and actions pertaining to localized non-policy decisions, and it uses a polling process for any recommendations that need to go to the Governing Board for review.

B) Management

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

Executive Director, Jennifer O'Farrell: Jennifer has consulted, contracted with and worked for various non- profits ensuring agency success through innovative and crisis response solutions and partnership to better serve victims of abuse. She is a subject matter expert in the field training on trauma informed care, cultural competency and response of sexual assault victims.

Associate Director of Programs, Erika Gomez: Erika oversees the entire enrollment, match support, and administrative program staff. Both ensure that policies within our program Standards of Practice are adhered to, and are responsible for hiring and training program staff, and helping to create strength-based leadership and professional development plans for all program staff.

Match Support Specialists/Case Managers are responsible for monthly calls to the child/Little, their parent/guardian and the mentor/Big to ensure child safety, positive impacts for youth, training assistance for Bigs, constructive and supportive tools and best practices so that each match is satisfied and the relationship is strong, healthy and equipped for a long-term relationship.

Volunteers- Masters in Social Work (MSW) interns: MSW interns capture baseline data to compare match retention lengths while developing overcoming obstacle strategies for resource referrals.

2018 S.L. Gimbel Foundation APPLICATION

Organization Name:

Big Brothers Big Sisters of the Inland Empire

V. Project Budget and Narrative (Do not delete these instructions on your completed form).

A) **Budget Table:** Provide a detailed line-item budget for your entire project by completing the table below.

Requested line items should be limited to Ten (10) line items. The less the better.

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

- 1) Line item requests for materials, supplies, equipment and others:
 - a. Identify and list the type of materials, supplies, equipment, etc.
 - b. Specify the unit cost, number of units, and total cost
 - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff compensation, benefits: **Do not use FTE percentages.**
 - a. Identify the position; for each position request, specify the hourly rate and the number of hours (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
 - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)
- 3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above: Provide rate of pay per hour and number of hours.
- 4) Line Item Description should be **no more than two lines**; otherwise, it will get cut off. Additional descriptions should be included in the Budget Narrative.

Line Item Request	Line Item Description <i>(Maximum two lines)</i>	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Match Support Specialists Training	5 staff x 40 hours/52 weeks @ \$20/hour		\$183,000	\$25,000	\$208,000
Training & Education Materials	5 staff / 2 hour monthly training meetings/conferences= \$1500 each		\$7,500	\$0	\$ 7,500
Meeting Space/Facility Cost	15 meetings/year @\$200/day = \$3000		\$3,000	\$0	\$3,000
Assistant Director of Programs	1-3-day training conference = \$800		\$800		\$800
TOTALS:		\$	\$ 194,300	\$ 25,000	\$ 219,300

B) Narrative: The budget narrative is the justification of “how” and/or “why” a line item helps to meet the project deliverables. Provide a description for each line item request as necessary. Explain how the line item relates to the project. If you are requesting funds to pay for staff, list the specific duties of each position. See attached SAMPLE Project Budget and Budget Narrative

Budget Narrative:

1. Personnel:

Match Support Specialists (case managers) are responsible for monthly calls to the child/Little, their parent/guardian and the mentor/Big to ensure child safety, positive impacts for youth, Training costs for 50 hours of training for 5 Match Support Specialists over 13 sessions. 5 staff x 40 hours/52 weeks @ \$20/hour

2. Training and Education Materials: Training materials for monthly trainings in addition to 1/2 day 4-hour workshop for all staff. 5 staff / 2 hour monthly training meetings/conferences= \$1500 each

3: Meeting Space/Facility Cost: 15 meetings/year @\$200/day = \$3000

4. Personnel: Associate Director of Programs: 3-day training conference = \$800

2018 S.L. Gimbel Foundation APPLICATION

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
Riverside Unified School District	\$70,000
City of Corona CDBG	\$22,000
County of Riverside CDBG	\$6,500
The Cal Endowment	\$ 10,000
Riverside University Health Systems	\$ 5,000
Sempra Energy	\$ 2,500
Goodwin Family Memorial Foundation	\$
	\$

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Niagara Cares	\$ 10,000	11/1/2018
Union Bank Foundation	\$ 10,000	12/31/2018
Riverside County Asset Forfeiture	\$ 15,000	12/31/2018
Riverside Community Health Foundation	\$ 25,000	12/31/2018
Seraphim Family Foundation	\$ 10,000	12/1/2018
	\$	

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

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$1,332,660	20 %	Program Fees	\$0	0 %
Fundraising/Special Events	\$ 2,335,500	36 %	Interest Income	\$ 0	0 %
Corp/Foundation Grants	\$2,234,000	34 %	Other:	\$7,200	1 %
Government Grants	\$266,000	4 %	Other:	\$335,500	5 %

Notes:

Big Brothers Big Sisters of the Inland Empire maintains it's own annual budget and fundraising activities, separate from Big Brothers Big Sisters. The top section shows the funding directly in the region, whereas the lower section Diversity in Funding Sources reflects our combined organization totals/percentages.

S.L. Gimbel Foundation APPLICATION

VII. Financial Analysis

Agency Name: **Big Brothers Big Sisters of the Inland Empire**

Most Current Fiscal Year (Dates): From 7/1/2016 To: 6/30/2017

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

Form 990, Part IX: Statement of Functional Expenses

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$ 5,321,640	\$ 4,268,365	\$ 474,342	\$ 578,993

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

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$5,321,640	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	80%	9%	10%

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

Percentage of Organization’s <u>Current</u> Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
9.5 %	9 %	.5 %

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

S.L. Gimbel Foundation APPLICATION

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

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$432,979	\$829,016	473,813	2.66

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$9,739,544	\$461,039

Notes:

<p>\$2M was moved from cash into a long-term investment account</p>
--

2018-2019 Inland Empire Organizational Budget



MENTORING YOUTH.
CHANGING FUTURES.

Expense Category	
Salaries	\$ 917,020.00
Payroll Taxes	\$ 77,919.15
Health Benefits	\$ 76,546.89
Worker's Comp	\$ 7,831.86
403(b) Matching Contribution	\$ 958.78
Payroll / FSA & 403B Fees	\$ 4,339.66
Staff Appreciation & Other	\$ 5,473.33
Total Salaries/Benefits/PR Taxes	\$ 1,090,089.67
IE Program Expenses - Community-Based	
Mileage Reimbursement	\$ 14,900.00
Supplies	\$ 600.00
Other	\$ 600.00
Background Investigations	\$ 8,400.00
Subtotal IE Community-Based Program	\$ 24,500.00
IE Program Expenses - Site-Based	
Mileage Reimbursement	\$ 9,600.00
Supplies	\$ 2,500.00
Inland SB HS Picnics	\$ 9,500.00
Inland SB Exp WPM	\$ 16,900.00
Subtotal IE Site-Based Program	\$ 38,500.00
IE Program Other	
Office Supplies & Postage	\$ 10,830.00
Volunteer Recruitment & Appreciation	\$ 6,900.00
Staff Development-Training, Travel	\$ 11,091.25
Program Meals & Meetings	\$ 1,800.00
Match Events	\$ 10,860.00
Other	\$ 9,600.00
Subtotal IE Program Other	\$ 51,081.25
Total Programs	\$ 114,081.25
PR & Marketing	
Print & Radio Advertising	\$ 8,112.39
Subtotal (PR & Marketing)	\$ 8,112.39
National Fees	
National Fees	\$ 7,748.99
Subtotal National Fees	\$ 7,748.99
IE Operating Expenses	
Rent, Utilities, Insurance	\$ 151,788.00
Furniture & Equipment	\$ 1,900.00
IT & Telephone	\$ 27,816.00
Other	\$ 2,400.00
Subtotal IE Operating Expenses	\$ 183,904.00
Total Operating Expenses	\$ 199,765.38
Depreciation Expense	\$ 21,408.00
Total Expenses	\$ 1,425,344.30

SAMPLE Budget Comparison

	Actuals		Budget		
	Most Recently		Projections		
	Completed Year		Current Year		Variance
	20 17		20 18		
Income					
Individual Contributions	11,070,859	-	1,917,950	-	9,152,909
Corporate Contributions	289,107	-	412,550	-	-123,443
Foundation Grants	1,852,136	-	2,123,100	-	-270,964
Government Contributions	-	-	-	-	-
Other Earned Income	3,464,962	-	3,214,564	-	250,398
Other Unearned Income	-	-	-	-	-
Interest & Dividend Income	-8,680	-	62,600	-	-71,280
Total Income	16,668,384	-	7,730,764	-	8,937,620
Expenditures					
Personnel					
Salary CEO	-	-	-	-	-
Salary Assistant	4,133,481	-	4,551,271	-	-417,790
Payroll Taxes	336,523	-	368,113	-	-31,590
Insurance - Workers' Comp	33,323	-	37,000	-	-3,677
Insurance - Health	297,454	-	361,630	-	-64,176
Payroll Services	17,386	-	19,650	-	-2,264
Retirement	25,083	-	25,200	-	-117
Total Personnel	4,843,250	-	5,362,864	-	-519,614
General Program/Administrative					
Bank/Investment Fee	4,277	-	4,044	-	233
Publications	-	-	-	-	-
Conferences & Meetings	3,634	-	4,605	-	-971
Mileage	4,079	-	3,900	-	179
Audit & Accounting	21,546	-	23,000	-	-1,454
Program Consultants	79,091	-	46,950	-	32,141
Insurance Expense	17,923	-	24,930	-	-7,007
Telephone Expense - Land Lines	-	-	-	-	-
DSL & Internet	18,457	-	18,000	-	457
Website	-	-	-	-	-
Office Supplies	23,771	-	23,800	-	-29
Postage & Delivery	2,432	-	4,800	-	-2,368
Printing & Copying	3,009	-	3,800	-	-791
Miscellaneous	1,907,371	-	2,171,028	-	-263,657
Total General Program/Administrative	2,085,590	-	2,328,857	-	-243,267
Total Expenditures	6,928,840	-	7,691,721	-	-762,881
Revenue Less Expense	9,739,544	-	39,043	-	9,700,501

**BIG BROTHERS/BIG SISTERS
OF ORANGE COUNTY, INC.**

Form 990 (2016)

95-1992702 Page 10

Part IX Statement of Functional Expenses

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

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

		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>					
1	Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2	Grants and other assistance to domestic individuals. See Part IV, line 22				
3	Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	212,675.	116,971.	10,634.	85,070.
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	3,269,518.	2,786,354.	139,189.	343,975.
8	Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9	Other employee benefits	276,228.	234,205.	11,789.	30,234.
10	Payroll taxes	290,604.	242,596.	12,496.	35,512.
11	Fees for services (non-employees):				
a	Management				
b	Legal				
c	Accounting	20,500.		20,500.	
d	Lobbying				
e	Professional fundraising services. See Part IV, line 17				
f	Investment management fees				
g	Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	2,360.	236.	2,124.	
12	Advertising and promotion	56,591.	14,148.		42,443.
13	Office expenses	80,363.	64,162.	3,195.	13,006.
14	Information technology	74,508.	62,819.	3,149.	8,540.
15	Royalties				
16	Occupancy	130,451.	22,769.	105,959.	1,723.
17	Travel	8,386.	7,000.	361.	1,025.
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	4,223.	3,525.	182.	516.
20	Interest	159,163.		159,163.	
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	29,336.	24,490.	1,261.	3,585.
23	Insurance	37,232.	31,557.	1,559.	4,116.
24	Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a	PROGRAM EXPENSES	598,106.	598,106.	0.	0.
b	NATIONAL FEES	24,518.	23,292.	1,226.	0.
c	BAD DEBT EXPENSE	17,900.	15,566.	700.	1,634.
d	MISCELLANEOUS EXPENSES	9,071.	7,796.	366.	909.
e	All other expenses	19,907.	12,773.	489.	6,645.
25	Total functional expenses. Add lines 1 through 24e	5,321,640.	4,268,365.	474,342.	578,933.
26	Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

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