

11/14 RESUBMIT (4)



**2014 S.L. Gimbel Foundation Fund Grant Application**

Internal Use Only:  
Grant: 20140817

\$25,000

**Organization / Agency Information**

<b>Organization/Agency Name:</b> CSUSB Philanthropic Foundation 196666		
<b>Physical Address:</b> 5500 University Parkway, San Bernardino, CA 92407-2393		
<b>Mailing Address:</b> 5500 University Parkway, San Bernardino, CA 92407-2393		
<b>CEO or Director:</b> Ron Fremont		<b>Title:</b> Executive Director
<b>Phone:</b> (909) 537-7769	<b>Fax:</b> (909) 537-7017	<b>Email:</b> foundation@csusb.edu
<b>Contact Person:</b> Lauren Savord		<b>Title:</b> Director, Corporate & Foundation Relations
<b>Phone:</b> (909) 537-7698	<b>Fax:</b> (909) 537-7017	<b>Email:</b> lsavord@csusb.edu
<b>Web Site Address:</b> http://www.csusb.edu/search.aspx?keyword=philanthropic+foundation		<b>Tax ID:</b> 45-2255077

**Program / Grant Information**

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

<b>Program / Project Name:</b> 68-acre "Land Lab" to Promote Community Access to Trails		
<b>Amount of Grant Requested:</b> \$25,000	<b>Total Organization Budget:</b> \$100,000	<b>Percentage of Organization's Total Budget used for Administration:</b> 5%
<b>Purpose of Grant Request (one sentence):</b> One-year pilot program to establish utilization of 68-acre reserve of undeveloped land in Chaparral habitat on perimeter of the campus of California State University, San Bernardino for education, instruction, research and enjoyment and to promote environmental protection and preservation.		
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> \$0		

**Signatures**

<b>Board President / Chair: (Print name and Title)</b> Dr. Ron Fremont, Executive Director	<b>Signature:</b> 	<b>Date:</b> 4/30/14
<b>Executive Director/President: (Print name and Title)</b> Dr. Ron Fremont, Executive Director	<b>Signature:</b> 	<b>Date:</b> 4/30/14

**2014 S. L. Gimbel Foundation Fund Application**  
**CSUSB: NARRATIVE for "Land Lab" Preserve Project**

**I. ORGANIZATION BACKGROUND; TARGET POPULATION**

Founded in 1960 and opening with only 293 students in 1965, California State University, San Bernardino (CSUSB) is part of the California State University system, the largest system of higher education in the country. Enrollment in 2013-4 exceeded 18,398 students. The mission/purpose of CSUSB is to provide individuals seeking higher education with a challenging and innovative academic environment in Inland Southern California where they can belong, study and excel toward graduation from a preeminent center of intellectual and diverse, cultural activity, thereby improving the region's quality of life, by and for, students, faculty, staff, alumni, and the community at large. CSUSB is listed among the best colleges and universities in the western United States, according to The Princeton Review, Forbes and U.S. News and World Report, in their respective annual rankings. It is part of the President's Higher Education Community Service Honor Roll, With Distinction – the highest federal recognition a college or university can receive for its commitment to service-learning and civic engagement. The Sierra Club named CSUSB one of "America's Coolest Schools." CSUSB is set at the foothills of the San Bernardino Mountains in a unique rural environment that is within the city limits of San Bernardino. CSUSB has developed highly respected programs in accounting, business, computer science and engineering, criminal justice, education, finance, geographic information, health sciences, natural science, nursing, psychology, public administration, and social work, among others. The majority of students come from the Inland Empire, a geographic region defined as a metropolitan area and region of Southern California that includes the U.S. Census Bureau-defined Riverside-San Bernardino-Ontario metropolitan area. The Inland Empire is economically disadvantaged, with a high number of persons earning below the poverty level in San Bernardino County (17.6 percent). The overall national poverty rate was recently reported to be 16.1 percent, with Hispanics at 28 percent and African-Americans at 25.7 percent.<sup>1</sup> CSUSB serves a uniquely diverse population of students between the ages of eight to 80, comprised of men and women from historically underrepresented minority groups, most of which are economically disadvantaged and lack educational opportunity. Of the current enrollment, 59.7 percent are African American, Hispanic, or Native American (American Indian or Alaskan Native). In 2013, 89 percent of CSUSB's Hispanic students are reportedly first-generation college students, i.e., those whose parents have less than a baccalaureate degree or higher. Similarly, 65 percent of African American students are first-generation college students as are 66 percent of American Indian students. Finally, CSUSB is designated a Hispanic Serving Institution, with 52.3 percent Hispanic/ Latino enrollment.

**II. PROJECT INFORMATION**

Statement of Need: Approximately one-third of the Earth's land surface is desert, arid land with meager rainfall that supports only sparse vegetation and a limited population of people and animals. Deserts are fragile natural laboratories in which to study the interactions of wind and sometimes water on the arid surfaces of planets. They contain valuable mineral deposits formed in the arid environment or exposed by erosion. Flora and fauna are unique and highly adapted to their environments. The misuse of these lands is a serious and growing problem in parts of our world. Water conservation is important within desert regions, and education will help educate youth and residents about the California Drought. Without education as to proper management and conservation of these lands, and about water, deserts could soon be lost forever.

Project Goal: The goal of this project is to promote environmental protection and the formation and preservation of open space by developing a 68-acre Coastal Sage scrub and Chaparral

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<sup>1</sup> [http://www.huffingtonpost.com/2012/11/14/american-poverty-2012\\_n\\_2130544.html?view=print&comm\\_ref=false](http://www.huffingtonpost.com/2012/11/14/american-poverty-2012_n_2130544.html?view=print&comm_ref=false)

## **2014 S. L. Gimbel Foundation Fund Application**

### **CSUSB: NARRATIVE for “Land Lab” Preserve Project**

Habitat Preserve located on the perimeter of the CSUSB campus for community education and enjoyment and university instruction and research. By developing the preserve and educating residents, project designers expect that innovative new ideas will result about desert management and conservation, having a positive impact on society and our desert regions.

Project Description: CSUSB sits at the base of the San Bernardino National Forest in a Terrestrial Desert/xeric shrub land characterized by a dry climate and an annual average rainfall of ten inches or less. A 68-acre Coastal Sage scrub and Chaparral Habitat Preserve, located on CSUSB’s campus perimeter, includes an existing unmarked trail used occasionally by the public for jogging. Upon funding, a project director (PD) will be hired to oversee all “Land Lab” activities. This project will increase awareness and understanding about issues related to environmental protection and conservation of deserts. Educational modules are envisioned discussing water conservation in desert areas, xeriscaping (landscaping with natural plants), and living with wildlife. Appropriate sign up of participants, plus a web presence and an active social media presence will ensure an active program for both youth and general community members.

Objective 1: PD engages community partners to clean up one trail and identify 50 key features for installation of environmentally friendly signage by the end of August 2014.

Activities 1: CSUSB hires project director (PD) to design and implement a program to promote education and preserve use; PD acts as liaison to identify and train volunteers for trail maintenance and placement of signage.

Objective 2: PD partners with unified school districts to increase awareness, understanding and knowledge of 480 students, grades 5 through 12, in San Bernardino and Riverside counties about topics related to the desert by visiting the “Land Lab” preserve.

Activities 2: Partner with two K-12 school districts to bus a minimum of 30 students from each grade level (5 through 12) to visit the preserve between 09/2014 and 04/2015.

Objective 3: Educate 1,000 community residents to increase awareness, understanding, knowledge and use of “Land Lab” preserve.

Activities 3: Create ad campaign on and off campus; Work with campus departments to promote trail use; Partner with Wells Fargo Bank’s volunteer program in fall event to bring out 50 volunteers to help set up trail marking process and two spring events to educate community; Advertise to and engage other community partners who “care” about issues; Engage media; Schedule radio spots for program director to talk about the trail, and promote its use.

#### Timeline:

Jul-Aug 2014: Hire PD to set up program office; schedule events; identify and train volunteers to clean trails and place signs; maintain records to evaluate outcomes; schedule volunteer event for 50 Wells Fargo Bank volunteers, CSUSB students, staff, and community members to hike and maintain trail(s) and post signage identifying foliage and wildlife.

Sep-Apr 2014: PD will act as liaison between CSUSB and school districts to schedule field trips. 480 students from San Bernardino City (SBCUSD) and Coachella Valley (CVUSD) unified school districts will participate in field trips to the “Land Lab.” Visits will reflect new California Common Core curriculum standards. Award funds will subsidize transportation (bus) costs.

Spring 2015: Two community events: (1) Main CSUSB Campus: April 21, 2015: CSUSB will include “Land Lab” booth at annual Earth Day event; (2) Palm Desert Campus: May 2015; Annual Environmental and Sustainability Expo brings middle and high school students, university researchers, and green industry leaders to PDC campus to learn about environmental science and sustainability for the Coachella Valley. A booth highlighting the “Land Lab” and the importance of habitat conservation will be at the May 2015 event.

**2014 S. L. Gimbel Foundation Fund Application**  
**CSUSB: NARRATIVE for “Land Lab” Preserve Project**

Populations Served: The “Land Lab” Project will serve three target populations: (1) CSUSB campus community (students, ages 18-24+ plus faculty and staff); (2) youth in grades 5-12 from SBCUSD and CVUSD; and, (3) members of the general population. Both CSUSB and unified school districts serve a diverse and large number of underrepresented minorities living at or below poverty. Statistics show the San Bernardino “Student Census Poverty Rate” was 36.9% in 2011 and free and reduced price lunch enrollment (a predictor of poverty) was 85% versus 53% statewide. CVUSD accommodates a fast-growing population of predominantly Hispanic (80%). Field trips to the “Land Lab” will provide hands-on learning critical to the future of California.

Project Outcomes: Literally thousands of residents, most of whom are educationally and economically disadvantaged and members of underrepresented minorities, will learn about the importance of environmental protection and conservation of deserts by attending field trips to the “Land Lab” with their school (youth grades 5-12) and volunteering and/or attending community events focused on the environment [CSUSB campus community (18,000); students in two K-12 school districts (480+); 1,000+ residents in San Bernardino and Coachella Valley].

Evaluation: PD will design all data-collection tools with support from CSUSB faculty and students and partnering school districts. Project design will include a proposed set of success criteria against which metrics will be compared. K-12 students participating in field trips will complete pre- and post-visit surveys. Surveys will align with new California Common Core curriculum standards. Data will also be gathered on volunteers and community residents who utilize the “Land Lab” for enjoyment and for event participants. For example, contact information will be requested and emails sent out inviting volunteers to “keep in touch” and view an interactive web site (designed by a CSUSB student). Output metrics will be used to improve the program into a second year, building sustainability and developing additional funding support to create a long-term program of community educational workshops, events, and tours about the importance of conservation and maintenance of the region’s natural habitat.

Use of Grant Funds: A \$25,000 award from the S.L. Gimbel Foundation Fund will help subsidize costs for (1) youth grades 5-12 from two unified school districts to the renovated 68-acre reserve for field trips and, (2) sharing information about the “Land Lab” at community events. This award is part of a “match” required by the lead funding agency, Wells Fargo Bank, who has been approached to fund \$50,000 of the total \$100,000 project. The remaining 25% match (final \$25,000) will be fulfilled with in-kind and volunteer service hours.

**III. Project Future:** Professionals in CSUSB’s Division of Advancement seek funding from individuals, corporations, and foundations on behalf of university programs, including the “Land Lab.” Over time, by identifying community residents who care about the environment, it is expected an annual fund drive will provide sustainable funds to maintain program costs.

**IV. Governance: Executive Leadership:** The CSUSB Philanthropic Foundation (PF) is the officially recognized 501(c)(3) nonprofit charitable gift processing organization for CSUSB, chartered to support, benefit and advance the university’s mission. Comprised of a volunteer board of 82 directors, PF has no paid staff. 100% of board members contribute financially.

**Governance: Key Personnel/Staff:** (1) Program Director: Half-time incumbent to be hired to design and administrate the program and support development efforts; (2) Kimberlyn Williams, Ph.D., Biology, College of Natural Sciences, will act as primary advisor to inform program strategy and design; currently a research associate with the Rancho Santa Ana Botanic Garden, Claremont, CA; (3) Dr. Dale Marsden, Superintendent, SBCUSD, and Dr. Darryl S. Adams, Superintendent of Schools, CVUSD, will identify district liaisons to work with PD to schedule K-12 field trips, produce educational materials, and perform other duties as assigned.

## 2014 S.L. Gimbel Foundation APPLICATION

### V. Project Budget

A) Please provide a detailed line-item budget for your project by completing the table below.  
Include all sources of funding for the proposed project.

<b>Line Item Description</b>	<b>Line Item Explanation</b> (Formula/equation used as applicable. Example: 40 books @ \$100 each = \$4000)	<b>Support From Your Agency</b>	<b>Support From Other Funders</b>	<b>Requested Amount From TCF</b>	<b>Line Item Total of Project</b>
Program Director	1 Half-time + benefits	\$0	\$25,000	\$0	\$25,000
Dedicated office equipment	Computer (\$1,000); supplies (\$600); furniture (\$900)	\$0	\$2,500	\$0	\$2,500
Travel budget for PD	1 RT / mo to PDC (160 miles @ \$0.55/miles X 12)	\$0	\$1,056	\$0	\$1,056
Data/social media intern	1 PT: 10 hours/wk X 50 weeks @ \$12/hr	\$0	\$6,000	\$0	\$6,000
Data tool development and data analysis	Software, printing, 2 sites	\$0	\$2,444	\$0	\$2,444
Project specific Supplies/Materials	Trail signage/200 units @ \$25/unit	\$0	\$5,000	\$0	\$5,000
Educational activities as designed by PD and teachers	2 units (one for each unified school district group) @ \$2,500 each	\$0	\$5,000	\$0	\$5,000
Subsidized buses for K-12 students	2 units (one for each unified school district) @ \$7,500 each	\$0	\$0	\$15,000	\$15,000
"Land Lab" booths, info handouts	2 events @ \$6,000 each	\$0	\$2,000	\$10,000	\$12,000
Materials, food for event volunteers	100 volunteers @ \$10 each	\$0	\$1,000	\$0	\$1,000
IN-KIND	Faculty participation, volunteer hours, space and accommodation for PD, other donations	\$25,000	\$0	\$0	\$25,000
<b>TOTALS:</b>		\$25,000	\$50,000	\$25,000	\$100,000

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

*Secured/Awarded*

Name of Funder: Foundation, Corporation, Government	Amount
CSUSB, Faculty participation, volunteer hours, other donations (WFB has offered up to 50 employees to assist with signage placement and with events; Dr. Kim Williams, Professor, Biology, CSUSB and federally designated indirect rate for space and accommodation for Program Director)	\$25,000
	\$25,000

*Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
National Fish & Wildlife Foundation Wells Fargo Environmental Solutions for Communities (requires 50% match)	50,000	Early June 2014
S.L. Gimbel Foundation (The Community Foundation)	25,000	July 31, 2014

**VII. Financial Analysis**

**Agency Name:** CSUSB Philanthropic Foundation

**Most Current Fiscal Year (Dates):** From: 2012 To: 2013

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!

**Program to Total Expenses Ratio:** Percentage of expenses used to support programming versus how much is spent for general management and fundraising. A general rule is that at least 75 percent of total expenses should be used to support programs – the higher the percentage the better.

Program Expenses	/Total Operating Expenses	= Program Expense Ratio
✓ \$2,914,314	✓ \$3,082,244	✓ 94.6 %

990: Part IX, Column B, Line 25      990: Part IX, Column A, Line 25

Administrative Expense (100%-Program Expense ratio) per 990 above	Percentage of Organization's <u>Current</u> Total Budget used for Administration (from cover page)	Differential
5 94.6 %	5 %	89.6 %

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

**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
\$1,638,131	\$65,333	\$229,628	7.4

**Excess or Deficit for the Year:**

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$1,838,766	\$29,321,990*
	*transition year-transfer of assets from old Foundation

**Notes:**

**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. NOTE: Numbers match 2013 audited financial statement (06/30/13)

<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>	<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>
All Contributions	\$1,875,448	34%	Transfers from University	\$1,007,395	18%
Fundraising/Special Events			Interest Income	\$765,636	14%
Corp/Foundation Grants			Endowments	\$373,136	7%
Government Grants			Other	\$1,508,872	27%

**Notes:**

**VIII. Application submission check list:**

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

CSUSB Philanthropic Foundation  
June 2013 - Membership Directory

**Dr. Susan L. Addington**

Professor, Department of Mathematics, CSU San Bernardino  
*\*Faculty Representative*

**Mr. Amro A. Albanna '91**

Founder and CEO, Innovation Economy Corporation

**Ms. Marie A. Alonzo**

Community Leader

**Mr. William J. Anthony**

President, Publisher and Producer, Inland Empire Business Journal

**Dr. Donald F. Averill**

President, Southern California Services, Professional Personnel Leasing, Inc.

**Mr. Richard H. Barker**

Community Leader

**Mrs. Glenda Bayless**

Owner, Bayless Accountancy Corporation

**Ms. Virginia M. Blumenthal, Esq.**

Attorney-at-Law, Blumenthal Law Offices

**Dr. Andrew Bodman**

Provost and Vice President

**Mr. Michael J. Bracken '92 & '99**

Owner, Development Management Group, Inc.

**Mr. Jack H. Brown**

Chairman/CEO, Stater Bros Markets

**Mr. Bob Burlingame**

CEO and Chairman of the Board, Burlingame Industries

**Mr. Arthur M. Butler '77**

Retired Director the Foundation, CSU San Bernardino

**Ms. Toni A. Callicott '89**

Director, Foundation Campaigns and Partnerships, CSU San Bernardino

**Mrs. Lois J. Carson '67**

Retired Executive Director, Community Actions Partnership of Riverside County



CSUSB Philanthropic Foundation  
June 2013 - Membership Directory

**Mr. Ali Cayir**

President, Transtech Engineers, Inc.

**Dr. Dorothy Chen-Maynard**

NFS Coordinator/Assoc Professor, Health Science Department, CSU San Bernardino

**Mr. Steve C. Chiang '88**

President, L.A. Web Inc.

**Mr. Greg K. Christian**

Executive Director, Kaiser Permanente Fontana & Ontario Medical Centers

**Mr. Henry W. Coil, Jr.**

President, Tilden-Coil Construction

**Mr. Benjamin P. Cook**

Owner, Hangar 24 Craft Brewery, LLC.

**Mr. Nicholas J. Coussoulis '75**

President & Chairman of the Board, Coussoulis Development Company

**Mr. Jim Cuevas**

CEO and COO, JJC Project Management Group

**Mr. Jamil Dada**

Vice President, Provident Bank

**Mr. Carl Dameron**

President, Dameron Communications

**Mr. Sundip R. Doshi '90**

Chairman & CEO, Surado Solutions, Inc.

**Mr. William F. Easley**

Vice President, Goforth & Marti Business Interiors

**Mr. Mark C. Edwards, Esq.**

Partner, Mirau, Cannon, Lewin and Tooke

**Dr. James Egan**

Retired Physician

**Mr. Gerald A. Fawcett '74**

Vice Chairman of the Board, Kaiser Ventures, Inc.

CSUSB Philanthropic Foundation  
June 2013 - Membership Directory

**Mr. James A. Ferguson**

Chief Executive Officer, The Tire Guys - Goodyear

*\*Secretary, CSUSB Philanthropic Foundation*

**Dr. Ronald H. Fremont**

Vice President, University Advancement

*\*Executive Director, CSUSB Philanthropic Foundation*

**Mr. Howard E. Friedman, CPA '85 & '12**

Owner, Howard Friedman CPA

**Mrs. Lorraine M. Frost '78, '80 & 85**

Interim Vice President, Information Resources and Technology

**Mr. Michael J. Gallo**

President and COO, Kelly Space and Technology

**Mr. Robert Gardner**

Vice President, Administration and Finance

*\*Treasurer, CSUSB Philanthropic Foundation*

**Dr. Appannagari GnanaDev '01**

Medical Director, Arrowhead Regional Medical Center

**Mr. Paul C. Granillo '91**

President and CEO, Inland Empire Economic Partnership

**Mr. Fred Hamilton**

**Dr. W. Benson Harer, Jr.**

Retired Physician

**Mr. Jim Imborski**

Vice President, Associated Engineers Parsons Brinkerhoff

**Mr. Cole R. Jackson**

CPA, Reiss Jackson & Company

**Mr. Mark A. Kaenal '84 & '89**

Senior Vice President, Security Bank of California

**Mr. Robert J. Kain**

Principal, HMC Architects

CSUSB Philanthropic Foundation  
June 2013 - Membership Directory

**Mr. Aaron Knox**

President, TMG Communications, Inc.

**Mr. Wilfrid Lemann, Esq.**

Partner, Lemann, Shaefer and Dominick

**Mr. Dobbin Lo**

Attorney at Law, Law Offices of Dobbin Lo & Associates

**Mr. Paul R. Mata '87**

Founder, Logos Lifetime Univeristy

**Ms. Barbara McGee**

City Clerk, City of Rialto

**Mr. Charles E. McNeely**

Former City Manager of San Bernardino

**Dr. Michael R. Miller**

Retired Dentist, Michael R. Miller D.D.S.

**Mr. Louis G. Monville, III '94**

Vice President, O'Reilly Public Relations

*\*Vice Chair of the CSU Board of Trustees*

**Dr. Tomás D. Morales**

President, CSU San Bernardino

*\*President, CSUSB Philanthropic Foundation*

**Dr. Yolanda T. Moses '68**

Special Asst to the Chancellor for Excellence and  
and Diversity, University of California, Riverside

**Mr. Michael J. Napoli, Jr.**

Founder & Chairman, Absolute Return Group

**Mr. John C. Nolan, Esq.**

Shareholder, Gresham, Savage, Nolan & Tilden, LLP

**Mr. Richard R. Oliphant**

President and Owner, California Intelligent Communities, LLP

**Mr. Patrick O'Reilly**

President/CEO, O'Reilly Public Relations

CSUSB Philanthropic Foundation  
June 2013 - Membership Directory

**Mr. Neale A. Perkins**  
Chairman, Safariland, Ltd, Inc.

**Ms. Madelaine Pfau**  
Partner, Heidrick & Struggles

**Mr. Steve PonTell**  
President, La Jolla Institute

**The Honorable Ray R. Quinto**  
Council Member, City of Calimesa

**Mr. James C. Ramos, Jr. '02**  
Project Director, San Manuel Tribal Unity and Cultural Awareness Programs

**Mr. Ali C. Razi**  
President, Stratham Homes, Inc.

**Mr. George M. Reyes, Esq.**  
Partner, Best, Best & Krieger

**Dr. Frank L. Rincon**  
Vice President, Student Affairs

**Mr. Donovan Rinker-Morris '00**  
Attorney, Clyde & Co., LLP

**Dr. Louie F. Rodriguez '98**  
Assistant Professor, College of Education, CSU San Bernardino  
*\*Faculty Representative*

**Mr. Donald L. Rogers**  
Retired Executive Director, Inland Valley Development Agency

**Mr. Ali Sahabi**  
President, SE Corporation

**Mr. Phillip M. Savage, IV, Esq.**  
Partner, Gresham, Savage, Nolan & Tilden, LLP

**Mr. Larry R. Sharp '03**  
Retired Vice President for University Advancement, Cal State San Bernardino

**Mr. Paul M. Shimoff, Esq.**  
Partner, McPeters, McAlearney, Shimoff & Hatt

CSUSB Philanthropic Foundation  
June 2013 - Membership Directory

**Mr. Jeffrey S. Shockey '88 & '94**  
Co-Owner, Shockey Scofield Solutions

**Dr. Ernest H. Siva**  
Tribal Historian and Cultural Advisor, Morongo Band of Mission Indians

**Ms. Jean M. Stephens '91**  
Chief Executive Officer, RSM International

**Mr. William M. Stevenson '84**  
Vice President, Community Bank

**Dr. Edward C. Teyber**  
Professor, Psychology Department & CCC Director

**Mr. Bruce D. Varner**  
Partner, Varner & Brandt, LLP

**Mr. James Walker**  
President, Associated Students Incorporated

**Mr. James R. Watson**  
President, Watson & Associates  
*\*Chairperson, CSUSB Philanthropic Foundation*

**Mrs. Ellen G. Weisser '68**  
San Bernardino County Employees Retirement Association, Bonnes Meres  
*\*Vice Chairperson, CSUSB Philanthropic Foundation*

**CSUSB PHILANTHROPIC FOUNDATION**  
**Statement of Activities**  
**March 31, 2014**

**Revenues:**

Contributions-Temp. Restricted	\$2,249,311.87
Contributions-Permanently Restricted (Endowments)	\$332,648.93
Investment Income	\$575,151.29
Miscellaneous Income	\$272.00
	<hr/>

**Total Revenue** **\$3,157,384.09**

**Expenses:**

Program expenses	\$411,666.86
Contract services	\$116,047.35
Supplies and services	\$242,750.94
Stewardship and donor cultivation	\$20,983.92
Travel expense	\$61,236.61
Insurance expense	\$14,856.60
Audit expense	\$14,310.00
Scholarship	\$1,169,744.19
Total Program and General Expenses	<hr/> \$2,051,596.47

**Other Activity:**

Gain/(loss) on sale of securities	\$466,102.79
Unrealized gain/(loss) on investments	\$1,651,595.81
Transfer from/to other campus entities	<hr/> (\$156,222.15)

**Total Expense and Other Activity** **(\$90,120.02)**

**Change in Net Assets** **\$3,067,264.07**

**ACTUAL PREVIOUS YEAR EXPENSES** **\$3,691,721.00**

**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 to any question in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21	1,559,731.	1,559,731.		
2 Grants and other assistance to individuals in the United States. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
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				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (non-employees):				
a Management				
b Legal	6,481.	6,481.		
c Accounting	117,995.		117,995.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	75,522.	75,522.		
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)				
12 Advertising and promotion	36,878.	36,878.		
13 Office expenses	828,740.	794,355.	34,385.	
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel	62,172.	62,172.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	28,262.	25,826.	2,436.	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	14,339.	14,339.		
23 Insurance	14,117.	1,003.	13,114.	
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 MISCELLANEOUS	338,007.	338,007.		
b				
c				
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	3,082,244.	2,914,314.	167,930.	0.
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)

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **OCT 06 2011**

CSUSB PHILANTHROPIC FOUNDATION  
5500 UNIVERSITY PKY  
SAN BERNARDINO, CA 92407-2393

Employer Identification Number:  
45-2255077  
DLN:  
17053266337001  
Contact Person: ERIC KAYE ID# 31612  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(iv)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
March 21, 2011  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)



CSUSB PHILANTHROPIC FOUNDATION

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

A handwritten signature in black ink, appearing to read "Lois G. Lerner". The signature is fluid and cursive, with the first name "Lois" being the most prominent.

Lois G. Lerner  
Director, Exempt Organizations

Enclosure: Publication 4221-PC



The  
Community  
Foundation

Serving the Counties of Riverside and San Bernardino

*S. L. Gimbel Foundation Fund*

December 5, 2014

BOARD OF DIRECTORS

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Rose Salgado

Beverly Stephenson

Grover Trask  
Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba  
President and CEO

Mr. Ron Freemont  
Executive Director  
CSUSB Philanthropic Foundation  
5500 University Parkway  
San Bernardino, CA 92407-2393

Dear Mr. Freemont:

Congratulations! A grant has been approved for **CSUSB Philanthropic Foundation** in the amount of **\$25,000** from the S.L. Gimbel Foundation. The **performance period for this grant is December 1, 2014 to November 30, 2015**. Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

*Land Lab to promote Community Access to Trails: Establish utilization of a 68 acre reserve of undeveloped land in Chaparral habitat on perimeter of CSUSB campus for education, instruction, research and enjoyment and to promote environmental protection and preservation.*

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

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. The **Grant Evaluation is due by December 15, 2015** and a copy will be available online.

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

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

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

19666 CSUSB Philanthropic Foundation

20140817

GIMB42



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

December 17, 2014

Ms. Celia Cudiamat  
Executive Vice President of Programs  
The Community Foundation  
3700 Sixth Street, Suite 200  
Riverside, CA 92501

Dear Ms. Cudiamat,

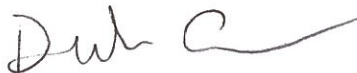
When we received notification of your grant of \$25,000 on behalf of the S.L. Gimbel Foundation in support of Cal State San Bernardino's Land Lab project, we were thrilled. On behalf of the CSUSB Philanthropic Foundation and the students from the San Bernardino and Coachella Valley Unified School Districts who will ultimately benefit from your generosity, we thank you very much for your support.

We will submit a narrative and fiscal report on project activities prior to December 15, 2015. We expect to bring 900 middle and high school students to campus during March of 2015 to visit the CSUSB Land Lab.

For many low income students in the Inland Empire, the possibility of a better life begins with higher education. With your help, we are introducing 900 students to the idea of higher education in a very tangible way. Your philanthropic investment has the ability to promote academic achievement and make it possible for these students to visualize their academic dreams.

If you have any questions, please contact me at (909) 537-5267. Otherwise, please know how grateful we are for your generosity.

Best regards,



Duke Graham  
Director of Development  
College of Natural Sciences  
Phone: (909) 537-5267  
Cell: (909) 693-0067  
Email: [dgraham@csusb.edu](mailto:dgraham@csusb.edu)

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**2014 S.L. Gimbel Foundation Fund**

**Grant Agreement**

**Organization:** CSUSB Philanthropic Foundation

**Grant Amount:** \$ 25,000 **Grant Number:** 20140817

**Grant Period:** December 1, 2014 to November 30, 2015 (Evaluations due December 15, 2015)

**Purpose:** Land Lab to promote Community Access to Trails: Establish utilization of a 68 acre reserve of undeveloped land in Chaparral habitat on perimeter of CSUSB campus for education, instruction, research and enjoyment and to promote environmental protection and preservation.

**1. Use of Grant Funds**

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

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

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

**2. Payment of Grant Funds**

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

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

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

**4. Final Report and Records**

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

**5. Grantee's Financial Responsibilities**

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

**6. Publicity**

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

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

**7. Indemnification**

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

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

**8. Termination**

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

**9. Limitation of Support**

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

\*\*\*\*\*

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

Ronald Fremont  
Signature

12/16/14  
Date

RONALD Fremont  
Printed Name

Executive Director, CSUSB Philanthropic Foundation  
Title

Organization: 19666 CSUSB Philanthropic Foundation  
Grant Number: 20140817

cc  
12/19/14



The  
Community  
Foundation

Serving the Counties of Riverside and San Bernardino

*S. L. Gimbel Foundation Fund*

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Secretary of the Board

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Dr. Paulette Brown-Hinds

Sergio Bohon

Rabbi Hillel Cohn

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Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Patrick O'Reilly

Rose Salgado

Beverly Stephenson

Grover Trask  
Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba  
President and CEO

December 19, 2014

Mr. Ron Freemont  
Executive Director  
CSUSB Philanthropic Foundation  
California State University, San Bernardino  
5500 University Parkway  
San Bernardino, CA 92407-2393

Dear Mr. Freemont:

The Community Foundation is pleased to enclose a grant check for **\$25,000** from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned. The completed Grant Evaluation form is due by December 15, 2015 and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

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

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

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

20140817

38465

GIMB4.2



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

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

**CITIZENS BUSINESS BANK**  
 A Financial Services Company  
 3695 Main Street, Riverside, CA 92501  
 90-3414-1222

38465

Check Fraud Protection for Business

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

TO THE ORDER OF

DATE

AMOUNT

12/05/2014

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

CSUSB Philanthropic Foundation  
 California State University, San Bernardino  
 5500 University Parkway  
 San Bernardino, CA 92407-2393



*Jonathan Lorenzo Galan*  
 AUTHORIZED SIGNATURE

Security features. Details on back.

⑈038465⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

38465

19666	CSUSB Philanthropic Foundation	12/05/2014	038465	
20140817	12/04/2014 Land Lab to promote Community Access to Trails			25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		25,000.00	

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

The Community Foundation

38465

19666	CSUSB Philanthropic Foundation	12/05/2014	038465	
20140817	12/04/2014 Land Lab to promote Community Access to Trails			25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		25,000.00	

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