



2014 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant : 20140333

\$24,500

Organization / Agency Information

Organization/Agency Name: Catholic Charities San Bernardino & Riverside Counties 215		
Physical Address: 1450 North D Street		City/State/Zip: San Bernardino, CA 92405
Mailing Address: 1450 North D Street		City/State/Zip: San Bernardino, CA 92405
CEO or Director: Ken F. Sawa, MSW, LCSW		Title: CEO/Executive Vice President
Phone: 909.388.1246	Fax: 909.383.8316	Email: kfsawa@ccsbriv.org
Contact Person: My Hanh Luu		Title: Program Director
Phone: 909.388.1239, ext. 332	Fax: 909.383.0448	Email: mluu@ccsbriv.org
Web Site Address: www.ccsbriv.org		Tax ID: 95-3516461

Program / Grant Information

Interest Area: Health Environment Animal Protection Education Human Dignity

Program / Project Name: Immigration Support for Victims of Domestic Violence		
Amount of Grant Requested: \$24,500	Total Organization Budget: \$8,396,055	Percentage of Organization's Total Budget used for Administration: 12%
Purpose of Grant Request (one sentence): Funding from the Gimbel Foundation will enable Catholic Charities to hire a part-time Immigration Specialist to be based at the Family Justice Center in Riverside, and will help undocumented victims of domestic violence apply for Lawful Permanent Resident (LPR) status through U-Visas and Self-Petitions for married women.		
Gimbel Grants Received: List Year(s) and Award Amount(s) 2012 - \$6,612.00, 2013 - \$10,000		

Signatures

Board President / Chair: (Print name and Title) John C. Kosta, Board Chair	Signature: 	Date: 3/28/14
Executive Director/President: (Print name and Title) Ken F. Sawa, CEO/Executive Vice-President	Signature: 	Date: 3/28/14

2014 S.L. Gimbel Foundation Fund Catholic Charities Narrative

I. Organization Background; Target Population:

A. What is the history, mission and/or purpose of your organization? How long has the organization been providing programs and services to the community? Catholic Charities is one of the largest and most accomplished social services organizations in Southern California's Inland Region. The organization's mission is to provide services that impact family, neighborhood, and society so that lives are filled with hope. The organization serves *all* people in need - regardless of religious affiliation and without discrimination. Catholic Charities was founded in 1980, and has helped people in need for over 30 years.

B. What are some of your past organizational accomplishments (last three years)? Catholic Charities is proud of its steady, annual organizational growth, at a pace necessary to keep up with the constant increase in demand for its services throughout Riverside and San Bernardino Counties. The organization's budget has tripled over the past 15 years, as has its diverse base of funding sources, including government agencies (49% of its current budget), myriad corporate and private foundations, and thousands of individual donors. This history of consistent growth, financial and programmatic flexibility, and "staying-power" sets Catholic Charities apart from other organizations in the Inland Region, especially during the challenging economic crisis of the past 5 years, when many social service organizations have cut back services or shut down altogether.

C. What are your key programs and activities? Describe the communities you serve. Include populations, geographic locations served, and relevant statistics. Catholic Charities' programs and services include wrap-around solutions for individuals and families in crisis and/or living in poverty. The organization's staff and volunteers provide tangible assistance to nearly 20,000 households every year, through more than 45 distinct services in six regions, 47 cities and 138 locations throughout San Bernardino and Riverside counties. The organization's services are provided through the following three program areas:

FAMILY & COMMUNITY SERVICES – Family and Community Services caseworkers work to stabilize over 31,000 unduplicated individuals and more than 9,000 households in crisis every year.

COUNSELING SERVICES – Masters-level therapists in Catholic Charities' Counseling Services work to increase family health and well-being and help reunite families torn apart by abuse or neglect. Counseling staff provide services and other prevention programs to over 8,000 people annually.

REFUGEE & IMMIGRATION SERVICES – Catholic Charities' Refugee & Immigration Services (the subject of this proposal) provides accurate information and low or no-fee assistance to help non-citizens navigate the application process for naturalization, work permits, fiancé visas, and more.

II. Project Information:

A. Statement of Need: Specify the community need you want to address and are seeking funds for: For many years, Catholic Charities' Refugee and Immigration Services program has received client referrals from the Family Justice Center (FJC), a nonprofit organization that is based in the Riverside County District Attorney's office. The FJC has a mission to provide protection and prevention services for victims of domestic violence. The clients that the FJC refers to Catholic Charities are undocumented immigrants who are victims of domestic violence and living in Riverside County.

The Violence Against Women Act (VAWA), which Congress passed in 1994, created special provisions in United States immigration law to protect victims of abuse who are not U.S. citizens. In cases of domestic violence, the law allows certain victims who are not citizens to obtain lawful status without having to rely on their abuser to petition. In 2000, Congress also passed the Victims of Trafficking and Violence Protection Act (VTVP), which was intended to strengthen the ability of law enforcement agencies to investigate and prosecute cases of domestic violence and to better serve victims of these crimes. At this time, the U-Visa was created for undocumented victims of crimes who have suffered abuse and are willing to assist law enforcement and government officials in the investigation or prosecution of the criminal activity. These undocumented clients are those whom the FJC refers to Catholic Charities' Immigration Services programs. If they meet the requirements, they qualify for one of the following forms of legal immigration status designated by VAWA or VTVP: a U-Visa or a Self-Petition (depending upon their marital status). Yet the filing process for this special status, including the forms, the back-up documentation and the certifications required, are very complicated, and the complexities of U.S. immigration laws and regulations are often a barrier for these women. The FJC does not have the expertise, the time or the focus to commit to empowering these women with the information they need to successfully navigate the process of obtaining lawful status under VAWA/VTVP.

Although FJC refers these clients to Catholic Charities, many do not seek the expertise of the Immigration Services program because of fear, a lack reliable transportation, a lack childcare, and for other reasons that may cause them to lose this opportunity to become lawful residents. The FJC office has helped over 50 of these victims since January 2014. There is currently no system in place to ensure that they follow-up with Catholic Charities and obtain the help they are eligible for by law. There is a clear and pressing need for Immigration Services staff to be on-site at the FJC to ensure that the immigrant women covered under VAWA and VTVP are empowered with the resources they need to successfully obtain lawful status in the United States.

B. Project Goal, Objectives and Methodology

1. State your project goal. Describe your project. How does your project meet the community need? What is unique and innovative about this project? The ultimate goal of this project is to empower immigrants who are victims of domestic violence with the ability to work in the United States, to improve their economic situation, and to work toward greater stability for themselves and their families. With support from the Gimbel Foundation, Catholic Charities will do this by hiring a part-time Immigration Specialist who will be based at the FJC office in the city of Riverside. Having an Immigration Specialist on site at the FJC office will fill a huge gap in service for approximately one hundred victims of domestic violence who qualify for legal status under the VAWA and VTVP law, but for logistical reasons and lack of on-site expertise, do not have the ability to confidently navigate the immigration process. This project is innovative because there has never been an imbedded Immigration Specialist on-site at the FJC to serve the women who need support. This will enable both Catholic Charities and the FJC to provide the safest and most efficient services to victims of domestic violence in need.

2. State up to three objectives. Specify the activities you will undertake to meet each objective.

Objective I: Hire an Immigration Specialist based on-site at the DA's office in Riverside; complete on/before the end of month 1 of the grant period.

Activities: Recruit Immigration Specialist; hire, train and orient new hire to all Immigration Services principles and practices; complete within 30 days of contract award notification.

Objective II: Provide U-Visa and Self-Petition application and paperwork services for at least 100 victims of domestic violence over the 1-year grant period; beginning in month 2 and ongoing through the end of month 12.

Activities: Assess immigration needs of clients and determine eligibility, inform clients about requirements, assist clients to complete and safely obtain legal documents for immigration-related benefits, maintain accurate, complete and confidential case files on all clients served.

3. *Who will this grant serve? Describe your target population.* The Immigration Specialist will provide efficient, wrap-around immigration support to help approximately 100 victims of domestic violence obtain LPR status in the United States over the one-year grant period.

4. *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?* Catholic Charities currently provides Immigration Services to clients in locations throughout the Inland Region. However, there has never been an on-site Specialist at the FJC to serve women who need immigration support. Unfortunately, there are also many for-profit, unscrupulous, and uncertified immigration counselors in the two-county area. Catholic Charities is one of the few mission-led, institutionally-based providers of immigration services free from improper motive or personal profit.

C) Project Outcomes and Evaluation

Catholic Charities will employ project management software to track program objectives, activity targets, and clients served. Staff will meet monthly to ensure that they are on-task to complete work, and provide additional support where needed. Catholic Charities will consider this project a success if it meets at least 90% of its objectives listed above. The measurable outcomes for this grant are:

- A part-time Immigration Specialist will be hired and trained and based at the FJC office.
- Immigration Specialist will provide immigration services to at least 100 victims of domestic violence.

D. How will you use the grant funds?

Funds will be used to support the part-time salary, benefits and some program costs of the Immigration Specialist.

III. Project Future

A. Explain how you will support this project after the grant performance period.

Throughout the grant period, Catholic Charities will seek funds from other private and corporate foundations to support this project into the future. The organization will also measure the success of this project with the goal of replicating in in other FJC offices throughout Riverside County.

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

A. Describe your board of directors and the role it plays in the organization.

Catholic Charities has a very engaged Board made up of 18 community members and nine committees, including Audit; Real Estate; Community Engagement; Board Personnel; CEO Evaluation; Resource Development; Board Governance; Fiscal; and Ad-Hoc Employee Handbook Committee. The Board meets four times per year.

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

Ms. My-Hanh Luu, Program Director, is responsible for the oversight and development of all Catholic Charities' Immigration Services programs. Ms. Luu is BIA accredited and has 30 years of experience in immigration and refugee services.

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.

Line Item Description	Line Item Explanation (Formula/equation used as applicable. Example: 40 books @ \$100 each = \$4000)	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Immigration Specialist Salary	\$18/hour x 21 hours/week = 378; 378 x 52 = \$19,656	\$0	\$0	\$19,656	\$19,656
Benefits	\$19,656 x 15% = \$2,948	\$0	\$0	\$2,948	\$2,948
Office Supplies	Paper, printing cartridges, pens, pencils, etc.	\$500	\$500	\$0	\$1,000
Postage	Stamps and postage for large envelopes	\$500	\$0	\$0	\$500
Equipment	Computer & printer	\$250	\$1,750	\$0	\$2,000
Transportation	Mileage costs for auto travel	\$250	\$0	\$500	\$750
Publications	Industry papers and subscriptions	\$200	\$0	\$250	\$450
Training & Education	Conference attendance, webinars	\$355	\$0	\$1,145	\$1,500
TOTALS:		\$2,055	\$2,250	\$24,500	\$35,554

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
Family Justice Center (In Kind Support)	\$2,250
General Support Grants (Weingart, Wells Fargo, etc.)	\$2,055

VII. Financial Analysis

Agency Name: Catholic Charities San Bernardino & Riverside Counties

Most Current Fiscal Year (Dates): 7/1/12 to 6/30/13

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
\$6,889,387	✓ \$7,777,142	✓ 89%
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 Current Total Budget used for Administration (from cover page)	Differential
11 %	14 %	3 %

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

We strive to keep our indirect administrative expenses low, and were successful in doing so.

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
\$2,708,517	\$883,217	\$792,496	4.53

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$431,852	\$232,258

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.

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$1,053,553	12%	Program Fees	\$180,048	2.5%
Fundraising/Special Events	\$73,114	1%	Interest Income	\$148,060	2%
Corp/Foundation Grants	\$623,737	7%	Expense Reimb	\$252,727	3.5%
Government Grants	\$4,650,357	54%	In-Kind	\$1,533,681	18%

Notes: Total Revenue = \$8,651,440.00

VIII. Application submission check list:

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

Catholic Charities San Bernardino & Riverside Counties

BOARD OF DIRECTORS March 1, 2014

Title	First	Last	Employer	Job Title	BOD Position
Mrs.	Marilyn	Akins	Retired	Elementary School Teacher	Director
Mr.	Robert	Akins	Retired	Sales & Management	Director
Dr.	Donald	Averill, Ed. D.	Retired	Chancellor Emeritus	Vice-Chairman
Ms.	Laura	Clark	Diocese of San Bernardino	Chief Financial Officer	Treasurer
Sister	Mary Frances	Coleman	Diocese of San Bernardino	Director of the Office of Religious & Consecrated Life	Secretary
Ms.	Candace	Heaton	SBCUSD, San Bernardino	Elementary School Teacher	Director
Ms.	Dannette	Cooper	Union Bank	Senior Vice President	Director
Dr.	Edward	Hess	Kaiser-Permanente	Physician	Director
Ms.	Elizabeth	Hunsicker	Retired	Holistic Practitioner	Director
Mr.	John	Kosta	Retired	Corporate President	Chairman

Catholic Charities San Bernardino & Riverside Counties

BOARD OF DIRECTORS March 1, 2014

Mr.	Gerardo J. Lopez	Riverside County District Attorney's Office	Deputy District Attorney	Director
Mr.	J. M. (Mike) Mathews	Retired	Communications Director	Director
Mr.	Charles J. Rowley	University of California, Riverside	Associate Vice Chancellor Computing & Communications & CIO	Director
Mr.	William Schlegel	Upland Unified School District	High School Teacher	Director
Ms.	Teresa Seipel	University of California, Riverside	Librarian	Director
Mr.	Marty Swanson	Retired	Honorable Martin Swanson (Judge)	Director
Mrs.	mary Swanson	Retired	Attorney	Director
Ms.	Matlida A. Servan	Self Employed	Care Giver	Director
Ms.	MaryRose Wallace	Retired	Chief Financial Officer	Director

1 CATHOLIC CHARITIES SAN BERNARDINO/RIVERSIDE
2 Budgeted Statement of Support and Revenue and Expenses
3 For Fiscal Year Ending June 2014
4 MAIN AGENCY BUDGET

6 SUPPORT	AGENCY WIDE
7 Donations	\$ 189,000
8 Other Contributions	\$ 22,050
9 Special Contributions	\$ 15,750
10 Contributed by SB Diocese	\$ 682,500
11 United Way Designations	\$ -
12 United Way Inland Valley	\$ 47,250
13 United Way of the Desert	\$ 67,200
14 United Way Inland Empire	\$ -
15 Mojave Valley United Way	\$ 11,115
16 Desert Communities United Way	\$ -
17 Fund Raiser Income	\$ 73,500
18 In Kind	\$ 1,745,665
19 Expenses Reimbursed	\$ 192,209
20 Total Support	\$ 3,046,239
21 REVENUE	
22 Grant Income	\$ 5,251,124
23 Program Service Fees	\$ 145,530
24 Other Revenue	\$ 367,673
25 Total Revenue	\$ 5,764,327
26 Total Support Revenue	\$ 8,810,565
27 EXPENSES	
29 Salaries	\$ 4,424,194
30 Prof Fees and Contract Services	\$ 208,730
31 Supplies	\$ 87,919
32 Telephone	\$ 68,013
33 Postage and Shipping	\$ 10,961
34 Rent	\$ 158,597
35 Utilities Water & Gas	\$ 66,990
36 Building Maintenance / Yard / Alarm	\$ 38,388
37 Equipment Purchases	\$ 85,403
38 Equipment Rental and Maintenance	\$ 47,476
39 Printing and Publications	\$ 40,891
40 Program Materials	\$ 74,796
41 Transportation	\$ 110,475
42 Hauling	\$ 8,400
43 Professional Development	\$ 30,870
44 Direct Assistance	\$ 876,312
45 Direct Assistance Family Tragedy	\$ 52,500
46 Agency Dues	\$ 12,460
47 Scholarships	\$ 263
48 Agency Grants	\$ 525
49 Individual Grants	\$ 4,200
50 Insurance	\$ 50,637
51 Depreciation	\$ 10,500
52 Renovation	\$ 8,400
53 Special Designated Assistance	\$ 50,190
54 Indirect Expenses	\$ 225,680
55 In Kind Expenses	\$ 1,719,415
56 Fundraising Expenses	\$ 46,620
57 Volunteer Expenses	\$ 9,190
58 Sub-contractors	\$ 278,421
59 Board Expenses	\$ 3,150
60 Total Expenses	\$ 8,810,565
61 Change in Net Assets	\$ 0
62	

CATHOLIC CHARITIES SAN BERNARDINO/RIVERSIDE
STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2013

	Program Services				Support Services				Combined Total	
	Family and Community Services	Citizenship and Immigration	Counseling	Investment in Higher Education	Disaster Relief Recovery	General & Administration	Fund Raising	Sub Total		
EXPENSES										
Salaries	\$ 862,782	\$ 110,735	\$ 1,944,421	\$ -	\$ -	\$ 2,917,937	\$ 426,126	\$ 68,604	\$ 494,730	\$ 3,412,667
Health and retirement benefits	49,891	18,991	97,620	-	-	166,501	50,266	9,378	59,644	226,145
Payroll taxes	103,827	1,432	217,871	-	-	333,130	44,635	7,949	52,584	385,714
Fundraising	-	-	-	-	-	-	0	34,783	34,783	34,783
Professional services	36,937	695	32,251	3,000	-	72,883	43,022	28,896	71,918	144,801
Supplies	39,883	3,947	52,964	-	750	97,545	28,095	1,356	29,451	126,996
Telephones	30,212	3,274	18,730	-	435	52,651	13,213	762	13,975	66,626
Postage and shipping	2,608	861	1,528	-	-	4,996	1,423	5,089	6,512	11,508
Occupancy	104,135	4,320	122,833	-	-	231,287	32,801	-	32,801	264,088
Rental and maintenance of equipment	20,221	4,961	16,776	-	-	41,958	13,332	1,894	15,226	57,184
Printing and publications	200	-	27,793	-	-	27,993	1,152	3,541	4,693	32,686
Transportation	54,239	3,147	50,891	-	111	108,388	2,004	993	2,997	111,385
Conference and meetings	7,257	499	3,342	80	3,226	14,405	7,384	679	8,063	22,468
Specific assistance to individuals	842,724	101,134	-	-	69,587	1,013,446	2,594	-	2,594	1,016,040
Agency dues	3,260	800	-	-	-	4,060	14,232	1,129	15,361	19,421
Awards and grants	273	-	-	26,160	-	26,433	5,666	26	5,692	32,125
Insurance	8,571	1,025	15,761	-	-	25,357	15,914	376	16,290	41,647
Volunteer expense	8,514	53	-	-	-	8,567	113	146	259	8,825
In-kind expense	1,389,420	-	74,052	-	-	1,463,471	50,208	20,000	70,208	1,533,679
Interest	4,252	-	-	-	-	4,252	1,808	-	1,808	6,060
Subcontractor	-	-	292,383	-	-	292,383	0	-	-	292,383
Depreciation	-	-	-	-	-	-	51,719	-	51,719	51,719
Indirect expenses	95,824	8,227	139,274	-	-	243,325	2,416	-	2,416	245,741
General and administrative	-	-	-	-	-	-	1,615	-	1,615	1,615
TOTAL EXPENSES	\$ 3,665,029	\$ 274,101	\$ 3,108,489	\$ 29,240	\$ 74,109	\$ 7,150,968	\$ 809,738	\$ 185,602	\$ 995,340	\$ 8,146,309

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.				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22.	1,042,199.	1,042,199.		
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.	175,853.	151,233.	19,344.	5,276.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0.	0.	0.	0.
7 Other salaries and wages.	3,236,816.	2,766,706.	406,782.	63,328.
8 Pension plan accruals and contributions (include section 401(k) and section 403(b) employer contributions).				
9 Other employee benefits.	226,146.	166,502.	50,266.	9,378.
10 Payroll taxes.	385,714.	333,130.	44,635.	7,949.
11 Fees for services (non-employees):				
a Management.				
b Legal.				
c Accounting.	43,022.		43,022.	
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amt, list line 11g expenses on Sch O.)	101,779.	72,883.		28,896.
12 Advertising and promotion.				
13 Office expenses.	237,816.	183,184.	43,883.	10,749.
14 Information technology.				
15 Royalties.				
16 Occupancy.	264,089.	231,288.	32,801.	
17 Travel.	111,385.	108,388.	2,004.	993.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.	22,467.	14,404.	7,384.	679.
20 Interest.	6,060.	4,252.	1,808.	
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	51,719.		51,719.	
23 Insurance.	41,647.	25,357.	15,914.	376.
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 <u>Inkind food</u>	1,199,296.	1,199,296.		
b <u>Subcontractors</u>	292,383.	292,383.		
c <u>Indirect expenses</u>	245,740.	243,324.	2,416.	
d <u>Rental & maintenance</u>	57,184.	41,958.	13,332.	1,894.
e All other expenses.	35,827.	12,900.	21,626.	1,301.
25 Total functional expenses. Add lines 1 through 24e.	7,777,142.	6,889,387.	756,936.	130,819.
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 <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				



**S.L. Gimbel Foundation Fund
Grant Evaluation Form**

Date: July 15, 2013

Organization: Catholic Charities San Bernardino/Riverside

Contact Name: Beverly Earl

Title: Director Family and Community Services

Phone Number: 909 388-1239 x 308

Grant Period: Jan. 1, 2013 – Jun. 30, 2013

Award Amount: \$10,000

Grant Number: 2012989

(Please provide Grant Number)

- Describe the project's key outcomes and results based on your goals and objectives. Provide the number of clients served and other relevant statistics.

This year end grant evaluation report for the Food Distribution Program is integrated under our existing Family and Community Services Department.

Our primary goal is to improve the health, safety and stability of individuals and families receiving services. Our objectives include: 1) to meet the basic needs of families, 2) to provide families with the necessary support and linkages to other services, 3) to disseminate information helpful to families while providing family enrichment opportunities, and 4) to offer immigration/refugee services and professional counseling services as needed.

Families with Children:	71 households represent 123 adults 318 children under the age of 18
Seniors over age 60:	68 households represent 81 seniors -0-
Total	149 households 204 adults 318 children under the age of 18

- What were the challenges and obstacles you encountered (if any) in attaining your goals & objectives? How did you overcome and/or address the challenges and obstacles? What were the lessons learned?

No challenges.

- Describe any unintended positive outcomes as a result of the efforts supported by this grant.

An unintended positive outcome as a result of the efforts supported by this grant is that staff were able to provide nutrition education/outreach to 149 new households. Through our Home Economics/Lifeskills class participants received information on: 1) Good Nutrition – reduces the risk of obesity in children and adults; 2) Increase fruit and vegetables consumption; 3) Increase healthy beverage consumption – drink water instead of sugary drinks. 4) Eat fewer energy dense foods, reduce calories –switch to fat-free or low-fat milk; enjoy your food; and avoid oversized portions; and 5) Physical activity – increases energy reduces obesity.

- Describe the overall effect this grant has had on your organization.

This grant enable the agency to provide a continuity of services to the community; and to empower individuals and families to engage in healthy eating habits.

- Tell us a few success stories that made an impact on your organization and/or community as a result of this grant.

Brooke and Haley with three small children ages 2,4, and 6 came to Catholic Charities to request help with a stove and refrigerator. The husband works full-time for a local warehouse but his income just covers there monthly rent and utilities. The family's small refrigerator gave out about 2 months ago - it was used when they purchased it 4 years ago. For two months the family went to the grocery store daily to purchase their food. Without an refrigerator they went daily to purchase their perishables which is quite costly. The family had been smelling gas in their two bed-room house so they called the gas company out and low and behold the gas company disconnected the stove for that was the source of the problem. Now faced with no appliances they're looking at eating out daily which they cannot afford to do. Catholic Charities was able to partner with Salvation Army and they provided working appliances for the family. Catholic Charities purchased two weeks of groceries and the family is stable at this time.

Daniel age 35 - is a two time felon. He came to our food distribution program looking for help. Daniel was here daily and soon began to assist us with the unloading of the truck. Daniel is a single man with five children, ages 3 to 12 - who was unemployed (having prior felony convictions made things very difficult for him). Because of diminishing fund and resources, Daniel's children had to be removed from his home. So, Catholic Charities began to work with Daniel. He came to our "job club" and got his resume together. Daniel also became an active participant in our First Fathers classes, and gained viable job connections. His life story became an inspiration to many of the fathers who face the same struggles. Daniel eventually got a job through our program. He was able to get his children back, find a stable home and even purchase a vehicle. His story of triumph is a testament to his determination and will to succeed. We are proud that Daniel partnered with us in order to help change the direction of his life.

Emma and Phillip are the parents of a blended family which consists of ten members. They came to us in a gray Chevy Suburban which also served as their home. Yes – ten family members, from age 4 to 34, all sleeping in one van! Phillip was the only one working, and was only sleeping two hours a day, because they had to keep moving the car. They came to us weary and discouraged. We prayed with them and gave them enough hope to keep them moving forward. We then secured funds to put the family in two separate hotel rooms. Our case managers were able to find suitable housing for them and partnered with another agency to help with the costs associated with moving in. Emma and Phillip were able to re-establish stability in their family. Through the efforts of our dedicated staff, in partnership with Emma and Phillip, the lives of 8 children and 2 parents have been forever changed for the better.

- Provide a financial report on the use of your grant funds (expenditures).

Line Item	Description	Expenditure Amount	Balance
Stater Bros Food Purchase	Bulk Food Purchase	\$5,000	-0-
Stater Bros Food Vouchers	Food Vouchers	\$5,000	-0-
	Total Grant Expenditure	\$10,000	-0-

- Additional condition: Please report the following:

Recommendation

- ❖ Please send copies of publicity and other promotional materials.
- ❖ All variances or time extensions must be approved by The Community Foundation's Grant Committee. Please contact us at 951-684-4194, ext. 114 immediately if a variance or extension becomes necessary.

Please return the completed form to:

Celia Cudiamat, Vice President, Donor Services and Grant Programs
 3700 Sixth Street, Suite 200, Riverside, CA 92501 or fax to 951-684-1911
 Or email to: ccudiamat@thecommunityfoundation.net

CATHOLIC CHARITIES SAN BERNARDINO & RIVERSIDE COUNTIES
 Income Statement/with Budgets- GIMBEL FOUNDATION 212-65
 For the Six Months Ending June 30, 2013

	Account ID	Year to Date Actual	Year to Date Budget	Variance
Revenues				
Grant - S.L. Gimbel Foundation	5000-212-65	10,000.00	10,000.00	0.00
Total Revenues		<u>10,000.00</u>	<u>10,000.00</u>	<u>0.00</u>
Expenses				
Food Pantry Purchases	8900-212-65	5,000.00	5,000.00	0.00
Food Vouchers	8901-212-65	5,000.00	5,000.00	0.00
Total Expenses		<u>10,000.00</u>	<u>10,000.00</u>	<u>0.00</u>
Net Income		<u>\$ 0.00</u>	<u>\$ 0.00</u>	<u>0.00</u>

**Internal Revenue Service
P.O. Box 2508
Cincinnati, OH 45201**

Department of the Treasury

Date: June 12, 2013

Person to Contact:

Roger Meyer ID# 0110429

Toll Free Telephone Number:

877-829-5500

Employer Identification Number:

53-0196617

Group Exemption Number:

0928

United States Conference of Catholic
Bishops
3211 4th Street, NE
Washington, DC 20017-1194

Dear Sir/Madam:

This responds to your June 5, 2013, request for information regarding the status of your group tax exemption.

Our records indicate that you were issued a determination letter in March 1946, that you are currently exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, and are not a private foundation within the meaning of section 509(a) of the Code because you are described in sections 509(a)(1) and 170(b)(1)(A)(i).

With your request, you provided a copy of the *Official Catholic Directory for 2013*, which includes the names and addresses of the agencies and instrumentalities and the educational, charitable, and religious institutions operated by the Roman Catholic Church in the United States, its territories, and possessions that are subordinate organizations under your group tax exemption. Your request indicated that each subordinate organization is a non-profit organization, that no part of the net earnings thereof inures to the benefit of any individual, and that no substantial part of their activities is for promotion of legislation. You have further represented that none of your subordinate organizations is a private foundation under section 509(a), although all subordinates do not all share the same sub-classification under section 509(a). Based on your representations, the subordinate organizations in the *Official Catholic Directory for 2013* are recognized as exempt under section 501(c)(3) of the Code under GEN 0928.

Donors may deduct contributions to you and your subordinate organizations as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to them or for their use are deductible for federal estate and gifts tax purposes if they meet the applicable provisions of section 2055, 2106, and 2522 of the Code.

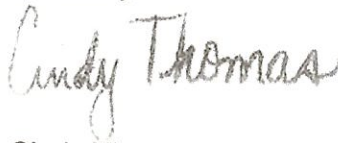
Subordinate organizations under a group exemption do not receive individual exemption letters. Most subordinate organizations are not separately listed in Publication 78 or the EO Business Master File. Donors may verify that a subordinate organization is included

in your group exemption by consulting the *Official Catholic Directory*, the official subordinate listing approved by you, or by contacting you directly. IRS does not verify the inclusion of subordinate organizations under your group exemption. See IRS Publication 4573, *Group Exemption*, for additional information about group exemptions.

Each subordinate organization covered in a group exemption should have its own EIN. Each subordinate organization must use its own EIN, not the EIN of the central organization, in all filings with IRS. 95-3516461

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

A handwritten signature in cursive script that reads "Cindy Thomas".

Cindy Thomas
Manager, Exempt Organizations
Determinations



The
Community
Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS

June 12, 2014

James Cuevas
Chair of the Board

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Vice Chair of the Board

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Sean Varner
Secretary of the Board

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Sergio Bohon

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D. Matthew Pim

Patrick O'Reilly

Rose Salgado

Beverly Stephenson

Grover Trask
Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba
President and CEO

Mr. Kenneth Sawa
Chief Executive Officer
Catholic Charities Riverside & San Bernardino
1450 North D Street
San Bernardino, CA 92405


Dear Mr. Sawa:

Congratulations! A grant has been approved for **Catholic Charities Riverside & San Bernardino** in the amount of **\$24,500** from the S.L. Gimbel Foundation. The **performance period for this grant is July 1, 2014 to June 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:

Immigration Support for Victims of Domestic Violence: Hire a part-time immigration specialist who will help undocumented victims of domestic violence.

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 on July 15, 2015** and a copy will be available online at www.thecommunityfoundation.net under Grants/Forms.

If you have any questions, please call me at 951-684-4192 ext. 114 or email me at ccudiamat@thecommunityfoundation.net.

Sincerely,



Celia Cudiamat
Executive Vice President

Catholic Charities Riverside & San Bernardino 20140333 GIMB2



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

3700 Sixth Street, Suite 200 ~ Riverside, California 92501
P: 951.241.7777 ~ F: 951.684.1911 ~ www.thecommunityfoundation.net

2014 S.L. Gimbel Foundation Fund

Grant Agreement

Organization: Catholic Charities Riverside & San Bernardino
Grant Amount: \$ 24,500 **Grant Number:** 20140333
Grant Period: July 1, 2014 through June 30, 2015 (Final report due by July 15, 2015)
Purpose: Immigration Support for Victims of Domestic Violence: Hire a part-time immigration specialist who will help undocumented victims of domestic violence.

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.

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.

Ken F. Sawa
Signature

6/17/14
Date

Ken F. SAWA
Printed Name

CEO/Exec. V.P.
Title

Organization: 245 Catholic Charities Riverside & San Bernardino
Grant Number: 20140333

Tcf-
Thank you! We
are excited about
this!
Ken

dcf
6/25/14



The
Community
Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS

James Cuevas June 27, 2014
Chair of the Board

Philip Savage IV Mr. Kenneth Sawa
Vice Chair of the Board Chief Executive Officer
Pat Spafford, CPA Catholic Charities Riverside & San Bernardino
Chief Financial Officer 1450 North D Street
San Bernardino, CA, 92405

Sean Varner
Secretary of the Board

Glenda Bayless

Sergio Bohon The Community Foundation is pleased to enclose a grant check for **\$24,500** from the S.
Rabbi Hillel Cohn L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the
Andrea Dutton grant check, you are agreeing to the conditions stated under the *Terms of Grant* which
Robert Fey you have signed and returned. The completed Grant Evaluation form is due by July 15,
Paul Granillo 2015 and will be available online on The Community Foundations website under
Stanley Grube 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.

Kirk Harns We greatly appreciate any help you can give us in publicizing the grant. **Please use the**
Dr. Albert Karnig **following credit in any grant announcements or materials funded by the grant: "The**
D. Matthew Pim **(name of project/program) is supported by a grant from The S. L. Gimbel**
Patrick O'Reilly **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.

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

Beverly Stephenson

Sincerely,

Grover Trask
Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba
President and CEO

Celia Cudiamat
Executive Vice President

20140333

37531

GIMB2



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

HOLD TO LIGHT TO VIEW WATERMARK IN PAPER / HEAT SENSITIVE REG IMAGE DISAPPEARS WITH HEAT / DETECTION CIRCLE REVEALS A LOCK WHEN TESTED

37531

The Community Foundation
Serving the Counties of Riverside and San Bernardino

3700 SIXTH STREET, SUITE 200
RIVERSIDE, CA 92501
951-241-7777 / FAX 951-684-1911

CITIZENS BUSINESS BANK
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DATE

AMOUNT

TO THE ORDER OF

06/19/2014

\$****24,500.00

Catholic Charities Riverside & San Bernardino
1450 North D Street
San Bernardino, CA 92405



Celia Andramat
Jonathan Lorenzo York
AUTHORIZED SIGNATURE

Security features. Details on back.

⑈037531⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

37531

245 Catholic Charities Riverside & San Bernardino

06/19/2014 037531

20140333	06/12/2014	Immigration Support fo rVictims of Domestic Violence	24,500.00
GIMB	S.L. Gimbel Foundation Advised Fund		24,500.00

CHECK TOTAL: \$****24,500.00

The Community Foundation

37531

245 Catholic Charities Riverside & San Bernardino

06/19/2014 037531

20140333	06/12/2014	Immigration Support fo rVictims of Domestic Violence	24,500.00
GIMB	S.L. Gimbel Foundation Advised Fund		24,500.00

CHECK TOTAL: \$****24,500.00