



2015 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant : <u>20150823</u>

Organization / Agency Information


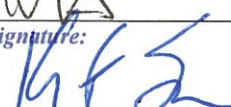
Organization/Agency Name: Catholic Charities San Bernardino & Riverside Counties		
Physical Address: 1450 North D Street		City/State/Zip San Bernardino, CA 92405
Mailing Address: 1450 North D Street		City/State/Zip San Bernardino, CA 92405
CEO or Director: Ken F. Sawa, MSW, LCSW		Title: CEO/Executive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

Program / Grant Information

Interest Area: Animal Protection Education Environment Health Human Dignity

Program/Project Name: Enriching & Strengthening the Lives of Low-Income Women & Adolescent Girls			Amount of Grant Requested: \$35,000
Total Organization Budget: \$7,428,550	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 90.47%	Per 990, Percentage of Management & General Expenses Only (Column C/ Column A x 100): 7.64%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D/ Column A x 100): 9.53%
Purpose of Grant Request (one sentence): Support from the Gimbel Foundation will enable Catholic Charities to better serve low-income women and adolescent girls by funding Masters-level therapists to provide outreach, education, skills development and individual, group and family counseling services for 150 low-income women and girls.			
Gimbel Grants Received: List Year(s) and Award Amount(s) 2014 - \$24,500; 2013 - \$10,000; 2012 - \$6,612.00. Non-Gimbel			

Signatures

Board President / Chair: (Print name and Title) John Kosta, Board President	Signature: 	Date: 9/1/15
Executive Director/President: (Print name and Title) Ken F. Sawa, MSW, LCSW, Chief Executive Officer	Signature: 	Date: 9/1/15

I. Organization Background:

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? The mission of Catholic Charities (Charities) is *to fight poverty and its consequences resulting in new opportunities and changed futures*. We do this by providing a wide array of crisis intervention and supportive services to over 50,000 people in need every year. Charities is one of the Inland Region's oldest and most accomplished human services organizations, and has helped struggling individuals and families for over 35 years. Charities serves all people in need - regardless of religious affiliation and without discrimination.

B. What are some of your past organizational accomplishments? Charities' history of growth, financial and programmatic flexibility and "staying-power" sets us apart from other organizations in the Inland Region. Over the past 3 years, Charities has been called upon to contribute to a number of regional, national and international newspaper stories about the problems unique to suburban poverty in this region of Southern California. As a result, we have become a key voice for the fight against poverty in the Inland Region, and we continue to work to increase public awareness about the everyday struggles of poor individuals and families throughout San Bernardino and Riverside Counties.

C. What are your key programs and activities? Describe the communities you serve. Charities provides compassionate social services that respond to the suffering of the vulnerable and those in crisis. Our reach is very broad and includes nearly 50 distinct programs and services in over 100 service locations throughout San Bernardino and Riverside Counties. The two-county Inland Region has a population of almost 4.3 million residents and is the poorest region of Southern California. Over the past year, our staff and volunteers provided flexible, culturally-sensitive, tangible assistance to nearly 25,000 unduplicated households, through three major program areas: Family & Community Services, Counseling Services (the subject of this proposal) and Refugee & Immigration Services.

II. Project Information:

A. Statement of Need: Specify the community need you want to address and are seeking funds for.

Charities provides comprehensive Counseling Services throughout the Inland Region. Over 50 part-time Master's Degree-level therapists increase individual and family health and well-being by providing professional counseling, anger management, parent education, and other intervention and prevention programs to thousands of unique households annually. However, much of this work is funded through public contracts, and is restricted to individuals and families that meet very specific eligibility requirements. Most low-income people in our communities are only able to access counseling services if they are mandated by a public agency to receive these services, or if they have a clinical diagnosis that meets the standard of *medical necessity* as defined by insurance companies.

Charities has provided Counseling Services in our region for nearly 30 years, and we know this to be true: most low-income individuals and families would benefit tremendously from community-based counseling services that could help this population overcome manageable problems. These services would strengthen the resilience of those struggling with non-clinical emotional and mental health problems - problems that still have a very negative impact on day-to-day functioning. It is important to note that middle class individuals and more affluent families are able to privately pay for this type of preventative and non-medical counseling, and are better able to access the resources and support they need to overcome challenges in their lives. Low-income individuals, however, cannot afford private-pay rates (on average \$75/hour); and the system is set up to only provide low- or no-cost counseling services when their emotional and mental difficulties have progressed to the point of significant impairments and medical need. There are very few resources available for low-income individuals who do *not yet* have a clinical diagnosis and do *not yet* have acute functioning impairments, but are at risk

for requiring higher levels of medical and mental health intervention if current problems/issues are not addressed.

Every month, our Counseling Services program receives many service requests from this population, and specifically from women and girls who are living at, near or below the poverty line and cannot afford to pay for counseling services. Statistically, women and girls are more likely to reach out for counseling support, yet they are also most often turned away because of the systemic issues described above. These women and girls are at-risk for more acute problems, including academic, professional and medical problems or further complication of current issues. Charities currently lacks the resources to consistently provide Counseling Services aimed at strengthening the emotional health and well-being of low-income women and girls in the Inland Region.

B. Project Goal, Objectives and Methodology

The overall goal of this project will be to improve the stability and emotional health of low-income women and adolescent girls in Riverside and San Bernardino Counties. Counseling Services' therapists will work toward this goal by providing services that meet the unique needs of low-income women and girls. These services will be client-focused, as accessible as possible, and may include mentoring, group therapy, training and education, and individual counseling. Treatment and education services funded through this grant from the Gimbel Foundation will also focus on issues that disproportionately affect women and adolescent girls, including but not limited to self-confidence; healthy relationships; relational aggression; developing social supports, managing stress and low-level depression; self-empowerment; body image; identity formation; problem solving skills; and social skills development.

2. State up to three objectives.

Objective I: Identify Masters-level therapists to provide direct services and manage all project objectives, including extensive community outreach. These activities will be completed on/before the end of month 1 of the grant period.

Activities: Form a team of Masters-level female therapists and orient identified staff to the program objectives and proposed services; complete within 30 days of contract award notification.

Objective II: Provide Counseling Services to at least 150 additional women and adolescent girls throughout San Bernardino & Riverside Counties; services will begin in month 2 and be ongoing through the end of month 12.

Activities: Provide accessible, client-focused, Counseling Services that may include but not be limited to: mentoring, group therapy, training and education, and individual counseling.

Objective III: Help women and adolescent girls who receive Counseling Services move up a continuum of emotional health improvement; empower them with the knowledge and skills necessary to help better manage problems and challenges into the future; beginning in Month 2 and ongoing through the end of the grant period.

Activities: Throughout the project period, track each clients' progress along continuum, from low emotional health and stability to a place of "stable" or "thriving" emotional health, with the additional knowledge and skills to help them overcome obstacles in the future.

3. Who will this grant serve? Describe your target population.

The target populations for this grant will be 150 low-income women and adolescent girls who are experiencing a short-term period of crisis and lack the insurance benefits or the personal financial resources to pay for counseling services. Counseling Services staff will complete extensive community outreach to introduce women and adolescent girls in need to the free services provided through this grant from Gimbel. All services will be driven by the needs of each individual client. The people

served by this grant will have a range of challenges, including social difficulties, educational challenges, marital/relationship stressors, child behavioral problems, substance abuse in the home, anger management issues, under-developed parenting skills, and extraordinary stress due to multiple individual and family challenges.

4. How does this project relate to other existing projects in the community?

There are very few counseling services providers in the Inland Region that are able to provide services driven by the needs of the client, and not based on a contract mentality or an insurance-based system that requires meeting the standard of *medical necessity* or the confines of a weekly, 50-minute counseling session. This project is unique because it will address the current emotional/mental health challenges of women and girls, while empowering them with the knowledge and resiliency skills necessary to overcome difficulties in the future. The women and adolescent girls served by this grant will be those who need help but cannot access services because they are not eligible for any existing public funded programs and/or their problems are not deemed acute enough for MediCal/insurance reimbursement. Charities will collaborate with other nonprofit organizations focused on serving women and adolescent girls, including but not limited to youth groups; middle and high schools; and domestic violence shelters. Volunteers will participate in the project by helping with outreach to collaborating organizations, including making phone calls, posting marketing materials, and more.

C) Project Outcomes and Evaluation

Charities will measure the success of this grant by tracking the number of women and girls served, and each client's Counseling Services Plan, which will include data that will measure and report on our ability to help the clients move up a scale of emotional health improvement. Charities will consider this program a success if, at the end of the grant period:

- Counseling Services increases the number services provided to low-income women and girls.
- Counseling Services staff provide services to at least 150 additional unduplicated individuals.
- At least 106 (85%) of the clients Counseling Services helps with this grant funding move along a scale, from crisis and low emotional functioning to a "stable" or "thriving" emotional state with the additional knowledge and skills to help them overcome obstacles in the future.

D) How will you use the grant funds?

Funds will support the salary and benefits of the Masters-level therapists focused on this project.

III. Project Future

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

Charities is in the process of sourcing additional private funding to build the capacity of our Counseling Services program into the future, and has pending proposals to the Carpenter Foundation and the Kaiser Permanente Foundation.

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

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

Charities Board meets 4 times per year and is made up of 18 community members and 9 committees, including Audit; Real Estate; Community Engagement; Board Personnel; CEO Evaluation; Resource Dev; Board Governance; Fiscal; and Ad-Hoc Employee Handbook Committee.

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

Charities' Executive Director, Ken F. Sawa, MSW, LCSW, will be responsible for overseeing all aspects of this grant. Our Counseling Services Director, Ms. Kathy Hitchens, will manage the evaluation aspects of this grant, and ensure that all staff are working toward the goals and objectives listed above, and that they have the support needed to ensure the success of this project.

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V. Project Budget

Line Item Description	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Masters-level Therapists	\$32/hour x 1,000 hours	\$0	\$0	\$32,000	\$32,000
Taxes & Benefits	Calculated @ \$3/hour x 1,000 hours	\$0	\$0	\$3,000	\$3,000
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	\$0	\$2,000	\$0	\$2,000
Transportation	Mileage costs for auto travel	\$1,000	\$0	\$0	\$1,000
Rent & Utilities	Office Space & utilities usage for Therapists & program activities	\$3,000	\$2,000	\$0	\$5,000
Training & Education	Conference attendance, webinars	\$0	\$500	\$0	\$500
TOTALS:		\$5,000	\$5,000	\$35,000	\$45,000

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
General Support Grants (W. O'Neil, Hearst Foundations)	\$5,000
In-kind Support from Catholic Charities	\$5,000

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	\$1,034,306	13.2%	Program Fees	\$188,975	2.4%
Fundraising/Special Events	\$72,277	0.9%	Interest Income	\$211,713	2.7%
Corp/Foundation Grants	\$251,625	3.2%	Net Assets Released	\$69,939	0.9%
Government Grants	\$4,488,871	57.3%	In-Kind	\$1,517,443	19.4%

Notes: Total Revenue \$7,835,149.00

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VII. Financial Analysis

Agency Name: Catholic Charities San Bernardino & Riverside Counties

Most Current Fiscal Year (Dates): From 7/01/2013 To: 6/30/2014

Form 990, Part IX: Statement of Functional Expenses

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$7,214,842	\$6,527,188	\$551,285	\$136,369

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

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	90.47%	7.64%	1.89%

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

Percentage of Organization's Current Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
12.57 %	7.64 %	+4.93 %

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

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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
\$3,377,724	\$550,545	\$963,405	4.08

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$136,568	\$431,852

Notes:

VIII. Application submission check list:

<u>Submit FOUR (4) Copies: 1 ORIGINAL (WITH ORIGINAL SIGNATURES) and 3 copies, collated and stapled together of the following:</u>	<u>Submit ONE (1) Copy:</u>
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). If you completed a 990-EZ, fill out the attached Part IX, Functional Expenses of the 990 form using figures from your 990-EZ	
For past grantees, a copy of your most recent final report.	



Catholic Charities San Bernardino & Riverside Counties

BOARD OF DIRECTORS - June 2015

Title	First	Last	Business Affiliation
Mrs.	Marilyn	Akins	Elementary School Teacher (Retired)
Mr.	Robert	Akins	Sales Manager (Retired)
Dr.	Donald	Averill, Ed.D.	Chancellor Emeritus, San Bernardino County College District (Retired) New job - Educational Consultant President of PPL
Ms.	Laura	Clark	Chief Financial Officer, Diocese of San Bernardino
Sister	Mary Frances	Coleman	Director of the Office of Religious & Consecrated Life, Diocese of San Bernardino
Ms.	Dannette	Cooper	Senior Vice President / Regional Manager Union Bank
Ms.	Candace	Heaton	Elementary School Teacher- San Bernardino
Mr.	Fernando	Heredia	Elementary School Teacher - Desert Sands USD
Ms.	Regina	Heredia	Principal - Desert Sands USD
Dr.	Edward	Hess	Physician- Kaiser Permanente Fontana
Mr.	John	Kosta	Corporate President - Advance Business Graphics (Retired)
Mr.	Gerardo J.	Lopez	Senior Deputy District Attorney Riverside County
Mr.	Charles J.	Rowley	Associate Vice Chancellor Computing & Communications and CIO- University of California Riverside
Mr.	William	Schlegel	High School Teacher-Upland
Ms.	Teresa	Seipel	Librarian- University of California Riverside
Ms.	Matilda A.	Servan	Self Employed- Care Giver
Mr.	Marty	Swanson	Honorable Martin Swanson (Retired Judge)
Mrs.	Mary	Swanson	Attorney (Retired)
Ms.	MaryRose	Wallace	Chief Financial Officer (Retired)

**Catholic Charities San Bernardino & Riverside Counties
Budget Comparison**

	Actuals		Budget	Variance
	Most Recently Completed Year	Current Year	Projections	
	2014-2015	2015-2016		
Income				
Individual Contributions	\$ 1,160,254	\$ 890,000	\$	(270,254)
Fundraising/Special Events	\$ 76,528	\$ -	\$	(76,528)
Foundation Grants	\$ 953,181	\$ 763,915	\$	(189,266)
Government Contributions	\$ 3,440,898	\$ 3,673,927	\$	233,030
Program Fees	\$ 189,708	\$ 201,973	\$	12,265
In-Kind	\$ 1,503,906	\$ 1,475,230	\$	(28,676)
Expenses Reimbursed	\$ 257,042	\$ 220,078	\$	(36,964)
Other Revenue	\$ -	\$ 203,430	\$	203,430
Interest & Dividend Income	\$ 109,068	\$ -	\$	(109,068)
Total Income	\$ 7,690,585	\$ 7,428,554	\$	(262,031)
Expenditures				
Personnel				
Salary	\$ 2,932,013	\$ 2,750,500	\$	(181,513)
Benefits - Health/Retirement	\$ 323,466	\$ 415,402	\$	91,936
Payroll Taxes / Fees	\$ 269,691	\$ 252,995	\$	(16,696)
Total Personnel	\$ 3,525,169	\$ 3,418,897	\$	(106,272)
General Program/Administrative				
Travel / Mileage	\$ 89,737	\$ 83,567	\$	(6,170)
Rent/Occupancy	\$ 220,370	\$ 213,077	\$	(7,293)
Telephone	\$ 49,660	\$ 51,324	\$	1,664
Utilities	\$ 60,602	\$ 69,711	\$	9,108
Office Supplies	\$ 87,501	\$ 101,254	\$	13,753
Insurance	\$ 22,174	\$ 51,445	\$	29,271
Direct Services	\$ 861,168	\$ 977,415	\$	116,247
Volunteer Expense	\$ 8,029	\$ 9,101	\$	1,072
Program Materials	\$ 12,058	\$ 44,377	\$	32,319
Postage & Delivery	\$ 12,672	\$ 14,735	\$	2,063
Professional Services	\$ 67,897	\$ 83,950	\$	16,053
Indirect Expense	\$ 251,600	\$ 220,078	\$	(31,523)
Professional Development / Training	\$ 21,186	\$ 24,487	\$	3,301
Subcontractor	\$ 334,650	\$ 456,912	\$	122,262
Fundraising	\$ 18,972	\$ -	\$	(18,972)
Events & Awards	\$ 5,064	\$ 5,000	\$	(64)
Printing & Publication	\$ 22,074	\$ 26,400	\$	4,326
Admin Expense	\$ 3,914	\$ -	\$	(3,914)
Actuarial Expense	\$ 62,621	\$ -	\$	(62,621)
Depreciation	\$ 45,743	\$ 47,400	\$	1,657
Student Investment	\$ 41,520	\$ 29,256	\$	(12,264)
In-Kind	\$ 1,503,906	\$ 1,475,230	\$	(28,676)
Miscellaneous	\$ 6,521	\$ 24,940	\$	18,419
Total General Program/Administrative	\$ 3,809,639	\$ 4,009,658	\$	200,019
Total Expenditures	\$ 7,334,808	\$ 7,428,555	\$	93,747
Revenue Less Expense	\$ 355,777	\$ (0)	\$	(355,777)

FOR MANAGEMENT PURPOSES ONLY

Part IX Statement of Functional Expenses

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

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

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	886,651.	886,651.		
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	178,118.	153,204.	19,593.	5,321.
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	3,168,360.	2,623,127.	464,862.	80,371.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	247,712.	181,970.	60,676.	5,066.
10 Payroll taxes	397,341.	333,305.	53,694.	10,342.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	40,360.		40,360.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17	23,675.			23,675.
f Investment management fees				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	51,582.	51,582.		
12 Advertising and promotion				
13 Office expenses	169,248.	128,478.	32,455.	8,315.
14 Information technology				
15 Royalties				
16 Occupancy	216,011.	182,835.	33,176.	
17 Travel	103,400.	100,609.	2,182.	609.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	50,372.	31,642.	17,113.	1,617.
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	55,560.		55,560.	
23 Insurance	41,928.	26,117.	15,811.	
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>	1,197,584.	1,197,584.		
b <u>Subcontractors</u>	266,360.	266,360.		
c <u>Rental & maintenance</u>	84,120.	77,066.	7,054.	
d <u>General & administrative</u>	21,105.	15,405.	5,700.	
e All other expenses	15,355.	271,253.	-256,951.	1,053.
25 Total functional expenses. Add lines 1 through 24e	7,214,842.	6,527,188.	551,285.	136,369.
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)				

Catholic Charities San Bernardino & Riverside Counties
Grant Number: 20140333
July 2015

S.L. Gimbel Final Evaluation Report Questions.
Questions 1-15 are required and must be completed

1. Organization name: Catholic Charities San Bernardino & Riverside Counties
2. Grant #: 20140333
3. Grant Period: July 1, 2014 – June 30, 2015
4. Location of Services (City and State): Riverside, CA & San Bernardino, CA
5. Name and Title of person completing evaluation: My-Hanh Luu, Refugee and Immigration Services Director
6. Phone Number: (909)388-1239
7. Email address: mluu@ccsbriv.org
8. Total number of clients served through this grant funding: 93
9. Describe the project's key outcomes and results based on the goals and objectives:

The ultimate goal of this project was to empower immigrants, who are victims of domestic violence, with knowledge of their rights and the ability to work in the United States in order that they may improve their economic situation and gain greater stability for themselves as well as their families. Catholic Charities provided U-Visa and Self-Petition application and paperwork services for 93 victims of domestic violence over the 1-year grant period.

10. Please describe any challenges/obstacles the organization encountered (if any) in attaining stated goals & objectives:

Individuals who qualify for VAWA (Violence Against Women Act) often hesitate to seek out assistance due to the control that their USC/LPR partner has over them. These women commonly have a very difficult time finding and

collecting documents in order to prove that they have lived together with their abuser. Due to their extraordinarily difficult and vulnerable situations, meeting this application requirement has proved to be one of the most challenging for petitioners.

11. How did the organization overcome and/or address the challenges and obstacles?

Fully utilizing the funding received for services to these difficult-to-reach populations, staff members collaborated with local women's shelters in order to provide critical information to clients in safe and trusted environments.

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

As a result of the efforts supported by this grant, Catholic Charities has been able to provide over 100 individual consultation and application assistance, for those eligible, to complete a USCIS application in order to receive a work permit or green card in order to become a USC.

13. Briefly describe the impact this grant has had on the organization and community served.

This grant has allowed for Catholic Charities to provide services at no charge to 48 clients, and for all clients who unable to afford a private attorney.

14. Please provide a narrative on how the funds were used to fulfill grant objectives. Support documents (receipts, expense reports or marketing materials) can be emailed to grant-info@thecommunityfoundation.net or faxed to 951-684-1911 or mailed to The Community Foundation, 3700 Sixth St. Suite 200, Riverside, CA 92501

Funds were used to pay for staff salaries engaged in funded services and as well as for mileage accrued for outreach purposes.

15. Please relate a success story.

Client A was 35 years old when she and her 7-year-old son and 2-year-old daughter came to the United States (U.S.) on visitor visas. She met and fell in love with an American man who convinced her to come to the U.S. so that they could start a family together. A few months after Client A and her children arrived in the US, the man began verbally abusing them. The verbal abuse escalated into physical abuse, as he began pushing and hitting Client A. He maintained control of Client A by using threats regarding her immigration status. He would say to Client A and to her children "Why don't you go back to Mexico where you belong?" He would also threaten her and tell her that if she reported him to the police, he would send her and her children back to Mexico "dead in a box." The psychological control that he exerted over Client A kept her locked in fear and prevented her from leaving him. When Client A's son was 15-years-old, he was a victim of a drive-by shooting and shot in the stomach as a bystander at a party. Social workers began investigating his family situation and they discovered the abuse that was occurring in the household, and moreover that Client A was experiencing stress and depression. The social workers told her that they could help her and that there were programs and resources that could assist her with her immigration status. Client A found the courage to leave and she came to Catholic Charities for assistance in applying for residency for herself and for her children. She had been received counseling services at Catholic Charities and soon discovered that Catholic Charities could help her with her immigration status. The immigration staff at Catholic Charities provided Client A with all of the information that she needed with regard to the family's ability to apply for permanent residency through the Violence against Women Act (VAWA). Immigration Staff explained to her the documents that she would need for the application and helped her with the application process. Client A said the Catholic Charity's staff was a great help to her and that the staff provided their full attention to her application process. It took Client A and her children 1 year to received permanent residency. Since receiving permanent residency, the family reports that they are experiencing less stress and are able to function more peacefully. Client A has been able to obtain a driver's license, and both she and her daughter are planning on attending school. Her son is unable to walk due to the shooting and received permanent disability allowing him to obtain critically needed resources. The family has also been able to go to Mexico and visit their family, whom they had not seen in many years. Client A expresses her sincerest gratitude to Catholic Charities for all of their support and help.

Questions 16-24 are optional questions and relate to demographic information on clients served. This helps us provide a broader picture of your organization and populations being served.

(Q16-17 optional space to relate additional success stories)

18. Which category best describes the organization. Please choose only one.

Humanitarian

19. What is the organization's primary program area of interest?

Support the DV

20. Approximate percentage of clients served through grant in each ethnic group category. Total must equal 100%

100% of clients served are Hispanic.

21. Approximate percentage of clients served from grant funds in each age category.

100% of all clients served are female and over the age of 30.

22. Approximate percentage of clients served with disabilities from grant funds. None

23. Approximate percentage of clients served in each economic group.

The majority of our clients live in low income families.

24. Approximate percentage of clients served from grant funds in each population category.

100% of our clients have income less than 100% of FPL.

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

Department of the Treasury

Date: June 4, 2014

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 May 19, 2014, 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 2014*, 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 2014* 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

2015 S.L. Gimbel Foundation Fund

Grant Agreement

Organization: Catholic Charities San Bernardino & Riverside Counties

Grant Amount: \$ 35,000 **Grant Number:** 20150823

Grant Period: November 15, 2015 through October 15, 2016

Purpose: Provide outreach, education, skills development and individual, group and family counseling services for 150 low-income women and girls.

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.

[Handwritten Signature]

Signature

11/6/15

Date

Ken F. SAWA

Printed Name

CEO/Executive V.P.

Title

Organization: 245 Catholic Charities San Bernardino & Riverside Counties
Grant Number: 20150823

do
11/19/15

2015 S.L. Gimbel Foundation Fund

Grant Agreement

Organization: Catholic Charities San Bernardino & Riverside Counties
Grant Amount: \$ 35,000 **Grant Number:** 20150823
Grant Period: November 15, 2015 through October 15, 2016
Purpose: Provide outreach, education, skills development and individual, group and family counseling services for 150 low-income women and girls.

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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.

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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

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



Signature

11/6/15
Date

Ken F. SAWA
Printed Name

CEO/Executive V.P.
Title

Organization: 245 Catholic Charities San Bernardino & Riverside Counties
Grant Number: 20150823


11/19/15



The
Community
Foundation

Strengthening Inland Southern California through Philanthropy

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS November 20, 2015

Philip Savage IV
Chair of the Board

Sean Varner
Vice Chair of the Board

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D. Matthew Pim

Teresa Rhyne

Dr. Henry Shannon

Tamara Sips

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Mr. Ken F. Sawa
CEO/ Executive Vice-President
Catholic Charities San Bernardino & Riverside Counties
1450 North D. Street
San Bernardino, CA 92405

Dear Mr. Sawa:

The Community Foundation is pleased to enclose a grant check for \$35,000 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 **October 31, 2016** 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 951-241-7777.

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

20150823

40049

GIMB5

Dr. Jonathan Lorenzo Yorba
President and CEO



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

The Community Foundation
 Strengthening Inland Southern California through Philanthropy
 3700 SIXTH STREET, SUITE 200
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PAY * Thirty-Five Thousand and no/100 *

TO THE ORDER OF

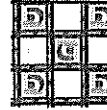
DATE

11/06/2015

AMOUNT

\$****35,000.00

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



Colin Andriamat
Jonathan Lorenzo Jorda
 AUTHORIZED SIGNATURE

Security features. Details on back.

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The Community Foundation

40049

245	Catholic Charities Riverside & San Bernardino	11/06/2015	040049	
20150823	10/28/2015	Provide group and family counseling services for 150		35,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		35,000.00	

CHECK TOTAL: \$****35,000.00

The Community Foundation

40049

245	Catholic Charities Riverside & San Bernardino	11/06/2015	040049	
20150823	10/28/2015	Provide group and family counseling services for 150		35,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		35,000.00	

CHECK TOTAL: \$****35,000.00