

*\$17,500*

### Organization / Agency Information



<b>Organization/Agency Name:</b> <i>Family Promise of Orange County, Inc.</i>		
<b>Physical Address:</b> <i>161 South Orange Street</i> <i>Orange, CA 92866</i>		
<b>Mailing Address:</b> <i>See Above.</i>		
<b>CEO or Director:</b> <i>Mr. Casey Crosbie</i>		<b>Title:</b> <i>Executive Director</i>
<b>Phone:</b> <i>714-787-3487 (office)</i>	<b>Fax:</b> <i>714-787-3489</i>	<b>Email:</b> <i>crosbie@FamilyPromiseOC.org</i>
<b>Contact Person:</b> <i>Mr. Casey Crosbie</i>		<b>Title:</b> <i>Executive Director</i>
<b>Phone:</b> <i>714-353-0428 (work cell)</i>	<b>Fax:</b> <i>714-787-3487</i>	<b>Email:</b> <i>Crosbie@FamilyPromiseOC.org</i>
<b>Web Site Address:</b> <i>FamilyPromiseOrangeCounty.org</i>		<b>Tax ID:</b> <i>27-0660182</i>

### Program / Grant Information

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

<b>Program/Project Name:</b> <i>Interfaith Hospitality Network - Financial Literacy Expansion</i>			<b>Amount of Grant Requested:</b> <i>\$17,500</i>
<b>Total Organization Budget: (2017)</b> <i>\$310,228 (cash)</i> <i>\$300,000 (in-kind)</i>	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> <i>83.1% (2015)</i>	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C / Column A x 100):</b> <i>9.0% (2015)</i>	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b> <i>7.9% (2015).</i>
<b>Purpose of Grant Request (one sentence):</b> <i>To assist Family Promise to provide emergency shelter families with additional financial literacy training once they return to housing.</i>			
<b>Program Start Date (Month and Year):</b> <i>8/1/2017</i>		<b>Program End Date (Month and Year):</b> <i>8/1/2018</i>	
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> <i>N/A</i>			

### Signatures

<b>Board President / Chair: (Print name and Title)</b> <i>Mr. Bernd Steinebrunner, Board Vice President</i>	<b>Signature:</b> 	<b>Date:</b> <i>6-15-17</i>
<b>Executive Director/President: (Print name and Title)</b> <i>Mr. Casey Crosbie, Executive Director</i>	<b>Signature:</b> 	<b>Date:</b> <i>6/15/17</i>

# **2017 S.L. Gimbel Foundation Fund APPLICATION**

## **Narrative**

Please provide the following information by answering **ALL** questions (I to IV) in **five (5) typed pages maximum, 12 Font, One Inch Margins**. Use the format below (I to IV). Type the questions. Type your answer to the questions accordingly. Please be thorough, clear, specific, and concise.

### **I. Organization Background**

#### **A) What are the history, mission and/or purpose of your organization? How long has the organization been providing programs and services to the community?**

**Our Mission:** The mission of Family Promise of Orange County (FPOC) is to help homeless families achieve housing stability by providing short term shelter, meals, case management and hospitality.

**Our Vision:** We believe that no child should have to sleep in a car, in a park, or under a bridge, and that every family deserves a chance to be whole and have a roof over their head again.

Family Promise of Orange County is one of 203 affiliates associated with the Family Promise national network of shelters, a nationwide association of agencies that focus specifically on issues relating to family homelessness. Family Promise National began over 25 years ago, and collectively Family Promise affiliates serve over of 57,000 family members annually.

FPOC began offering services to the Orange County community in 2012. As with all Family Promise affiliates, FPOC is its own separate 501(c)3, and all funds donated to the agency serve local families. Since our launch FPOC has consistently been a top ranking affiliate, both in client success rates and organizational growth. We have assisted over 175 families to return to permanent housing since we opened five years ago.

#### **B) What are some of your past organizational accomplishments (last three years)?**

FPOC has consistently maintained the highest return-to-housing rate of any family emergency shelter in Orange County (averaging 88-90% from 2014-2016). We have also deepened the services offered to families in multiple ways. In 2014, we began offering Financial Literacy trainings to families staying in all of our shelter programs. This has significantly improved our client's ability to maintain stable finances once returning to housing.

We also were the first Family Promise affiliate nationally to begin offering cooking and nutritional courses to families under our care. This program model has since been replicated by other affiliates in the Family Promise network and collectively serves several thousand individuals each year.

#### **C) What are your key programs and activities? Describe the communities you serve. Include populations, geographic locations served, and relevant statistics.**

FPOC assists families from the greater Orange County area who are suffering from a loss of housing. Although Orange County is generally considered to be affluent, high rents and general costs of living force many low-income families to live paycheck-to-paycheck. A single parent working two minimum wage jobs spends over 60% of their income to afford Orange County's median rental rate of \$1950/month. Job loss, health issues, or unexpected life events frequently put families behind on their bills, eventually resulting in evictions.

For these reasons, the Orange County Department of Education tracked an astounding 26,046 children during the 2014-2015 school year who were forced to double up with friends and family, live in a motel, or sleep in their parent's cars. Homelessness affects children dramatically. Homeless children are sick four times more often and have emotional and behavioral problems three times more often than non-homeless children do. Academically, 42% of homeless children transfer schools at least once per year and 23% repeat a grade.

FPOC offers three programs designed to help families quickly regain stability and independence. The first is our emergency shelter, the Interfaith Hospitality Network (IHN). This program provides up to two months of free shelter, meals, and supportive services for families with no place else to go. Second is our transitional housing program, known as Jacob's House. This program works with homeless families who are employed, but face crippling debts such as credit card debt, back-owed rent, or payday loans. Over 4-6 months families pay off and consolidate debts while receiving additional training and case management. Third, FPOC offers nutrition classes and ongoing grocery assistance to our residents and the local community through our Supplemental Nutrition and Cooking (SNAC) program.

Family Promise works with both single & dual parent households, although almost 70% of our families are headed by a single mother. In 2016, 55% of our families were Hispanic, 29% Caucasian, 12% African American, and 4% other race/ethnicities. All of our parents make less than 50% of Orange County's median income, and most face significant debts or other financial hardship when entering out shelter.

## **II. Project Information:**

### **A) Statement of Need**

1. Specify the community need you want to address and are seeking funds for.

Money management is bar-none the most important skill our families need once returning to housing. They will continue to work with an extremely tight budget, and must now once again pay for rent and other monthly expenses in addition paying off any previous debts.

Our transitional housing program was designed specifically to give families time to pay back those debts and receive more in depth financial literacy training. However, clients in our emergency shelter do not have this luxury. They typically return to housing in 4-6 weeks, giving the shelter very limited time to teach parents the skills they need or to help them save for the return to housing. This leads to increased difficulty for our IHN families, as they lack the ability to make sound financial decisions. Family Promise does extensive outreach to our graduates, and our IHN families report issues with spending/failure to save at 3x the rate of families that have completed our transitional program.

### **B) Project Description**

1. Describe your project. How does your project meet the community need? What is unique and innovative about this project?

For the last three years FPOC has been teaching a financial literacy curriculum known as New Beginnings to families in both of our shelter programs. This unique program was developed by Family Promise National in partnership with Woodforest National Bank, one of the nation's leading community banks. It is a unique evidence-based curriculum tailored to the needs of low income and homeless families.



The curriculum is designed to be taught by a social worker with additional volunteer assistance by financial literacy experts (bankers, credit planners etc). The curriculum leads families through numerous aspects of personal finance including: budgeting, borrowing & debt, improving credit scores, saving, and smart spending. To go through the full curriculum takes approximately 6 months.

We would like to offer our emergency shelter families the same educational opportunities that our transitional families receive. To that end we would like to begin offering continued classes to IHN families once they return to housing.

### C) Project Goal, Objectives, Activities and Expected Outcomes

Goal: Our goal is to empower homeless families participating in our IHN program to more fully manage their own finances.

Objective: In 2017-2018, 75-100 people (25 families) will complete the full six month New Beginnings Curriculum. This includes 1-2 months of assistance while in the shelter, and 4-5 once returned to housing.

Activities: Each family will be offered \$500 over five months (\$100 each month) to pay for rental/utility assistance while receiving ongoing financial literacy training.

Outcome: Six months following completion of the program, 20 or more families will have finished the full New Beginnings curriculum, and will report increased savings, reduced debt, and have a credit improvement plan in place.

Evaluation: At the beginning of the program, we will record all 25 families' savings, debt and credit scores. During the program our Social Worker will verify that each family attends all required workshops and completes New Beginnings assignments. Six months after completing the curriculum, 20 or more families will complete exit surveys that record their current savings, debt, and credit scores.

### D) Timeline

Provided we receive funding for the 'aftercare' portion of the program, we would begin offering classes to housed graduates **on 8/1/2017**. This includes graduates who have been housed in the first half of 2017, provided they are interested in beginning the program following a few month break. Family Promise will continue to offer the program until 25 families volunteer to begin the process or until **5/1/2018**. Our aim is for all funds to be expended **by 8/1/2018**.

### E) Target Population

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

At the end of program completion, 25 families (75-100 individuals) will have benefited from the program. This includes 30-50 adults who will have learned essential money management skills, and 50-70 children who will benefit from the added financial stability provided by their parents.

### F) Projects in the Community

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

FPOC's program model is unique in that we focus on one-on-one case management for each family. Several other shelters offer group "seminar" style budgeting classes, but no other organization in Orange County provides the individualized attention that FPOC does to its families. Working one-on-one allows families to feel comfortable talking in depth about finances and debts, something they are less prone to do in a group setting.

We also utilize volunteers from local banks to provide additional support for families' needs. Each family has access to a volunteer 'mentor' who can help them with specific questions relating to financial management (such as questions about what savings accounts they may qualify for or how to best improve their credit).

More broadly, our shelter is a strong believer in partnering with other agencies to promote family success. FPOC is an active participant in Orange County's "10 Year Plan to End Homelessness" and partners with many city housing authorities/public agencies to find affordable housing options for our families.

While families stay in our shelter, they benefit from afterschool programs through Boys and Girls Clubs, therapy through Cal State Fullerton's Department of Social Work, and vehicle repairs through the National Auto Body Council. We also utilize our base of over 900 volunteers to provide 11,000 hours of volunteer service (spent mentoring, tutoring, and generally showing hospitality to our families) and 10,000+ meals to our emergency shelter families in a given year. Thanks to this support we receive nearly \$1.00 in in-kind gifts for every \$1.00 we receive in cash donations.

#### **G) Use of Grant Funds**

**Family Promise is requesting \$17,500 for the implementation of this program. \$12,500 will be for rental/utility assistance given to families for their participation.** \$4,000 will toward hours for our Social Worker to teach classes, and \$1,000 will be spent on needed materials for the project (credit reports, printed materials etc).

### **III. Project Future**

#### **A) Sustainability**

**Explain how you will support this project after the grant performance period. Include plans for fundraising or increasing financial support designated for the project.**

Our Board of Directors and executive management work hard to create and maintain multiple sources of funding for all of our programs. Our IHN program is currently supported by several local banks who also provide volunteers to assist our families. These banks will be solicited for matching funds. We will also promote the program generally to our wide network of volunteers and individual donors, and endorse the program during major fundraising periods such as our gala and during our year end giving.

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

#### **A) Governance**

**Describe your board of directors and the role it plays in the organization. What committees exist within your board of directors? How does the board of directors make decisions?**



FPOC's board of directors is extremely engaged at all levels of the organization. They conduct a majority of FPOC's fundraising activities, and are actively involved with developing and expanding Family Promise's programming.

Currently the board has numerous standing committees including: finance & budgeting, human resource management, fundraising development, housing & program expansion, special events, and marketing & public relations. These are managed by our executive committee, made of the board officers. Each board member is typically on two or more committees, and committees are often made of both board and non-board members. Committees report back to the full board at monthly board meetings, where important decisions are voted on. The board also keeps in regular email contact, allowing for general discussion to happen between board meetings.

The board also has regular opportunities to evaluate the effectiveness of programming. The Executive Director provides monthly updates on all programs at board meetings.

**B) Management**

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

Casey Crosbie, Executive Director: Mr. Crosbie is a rising leader in the Orange County nonprofit community. He has over a decade of experience working with nonprofits that assist the poor and homeless, and serves on numerous advisory boards that address homeless issues in Orange County. He is also a member of the faculty at California State University Fullerton's Department of Social Work, where he teaches courses on welfare policy and homelessness.

Ashley Rebai, Social Worker: In 2015, Ms. Rabai graduated from California State University Fullerton's Department of Social Work with her Master's in Social Work and became Family Promise's full time in-house social worker. She has extensive experience working with families in crisis and has practiced Social Work in clinical, school, and therapeutic settings. Ms. Rabai has completed certifications in Crisis Intervention, Cognitive Behavioral Therapy, Motivational Interviewing, and is a registered "New Beginnings" Financial Literacy trainer through Family Promise National.

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### **V. Project Budget and Narrative**

<b>Line Item Request</b>	<b>Line Item Explanation</b>	<b>Support From Your Agency</b>	<b>Support From Other Funders</b>	<b>Requested Amount From Gimbel/TCF</b>	<b>Line Item Total of Project</b>
Rental Assistance	\$500/family (x25)		\$2,000	\$10,000	\$12,500
Social Worker Hours	300 Hours of Teaching @ \$23/hour (12 hrs/family)		\$2,900	\$4,000	\$6,900
Financial Literacy Books	25 New Beginnings Textbooks @ \$15/each	\$375			\$375
Additional Printing	\$25 in Toner/Paper for each family (x25)	\$125		\$500	\$625
Volunteer Support (in-kind)	150 Hours of Teaching from Volunteer Banker (6 hrs/family)		\$3,450		\$3,450 (in-kind)
Credit Checks	\$25/Family for Credit Checks (x25)	\$125		\$500	\$625
<b>Final Report Incentive Payment</b>	<b>\$100/Family (x25)</b>			<b>\$2,500</b>	<b>\$2,500</b>
<b>TOTALS:</b>		\$625	\$8350	\$17,500	\$26,975

#### **B) Narrative:**

Rental Assistance: This presumes each family will receive \$100/month for 5 months. If families finish the program in less than 5 months, the organization may be able to serve more than 25 families.

Social Worker Hours: This presumes our Social Worker will spend two/hrs month with families (totaling 10 hours) with an additional two hours spent preparing materials, running credit checks etc.

Financial Literacy Books: We purchase a New Beginnings textbook for each family to keep. (25x\$15)

Additional Printing: We commonly print credit reports and other resources to supplement the New Beginnings textbook. (25x\$15).

Volunteer Support: Families will also work with volunteer financial literacy experts. These individuals are not necessarily there every meeting, but are called when needed. For calculations, we presume their hourly rate is the same as our Social Worker's. (\$23/hr x 150 hrs, 6 hrs/family).

Credit Checks: Although families can receive the credit checks once/year for free, often we need to run their checks multiple times (example situation: verifying false credit issues have been resolved). FPOC has a service that will run credit for \$12.50/each. We presume we will run each families' credit 2x times (\$12.50x2x25=\$625).

**Follow-up Incentive: At six months, families will receive an additional \$100 in rental/utility assistance in return for a follow up meeting where they will complete exit surveys and also review their overall experience with the program.**

### SAMPLE Project Budget and Budget Narrative [added by request]

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Personnel: Project Coordinator	10 hours/week x \$20/hour x 40 weeks = \$8,000			\$ 8,000	\$ 8,000
Meetings	10 meetings x \$200/meeting for food and drinks = \$2,000		\$1,000	\$ 1,000	\$ 2,000
Training and Education: Honoraria for trainers	10 trainers x \$200/trainer = \$2,000			\$ 2,000	\$ 2,000
Materials and Supplies	\$40/student x 40 students = \$1,600	\$ 600		\$ 1,000	\$ 1,600
Workbooks	\$30 each x 40 students = \$1,200	\$ 200		\$ 1,000	\$ 1,200
Facility Cost	\$300/meeting x 10 meetings = \$3,000			\$ 3,000	\$ 3,000
Grant awards		\$5,000	\$5,000	\$10,000	\$20,000
Youth Recognition Event: Food	\$10/person x 100 people = \$1,000			\$ 1,000	\$ 1,000
<b>TOTALS:</b>		\$5,800	\$ 6,000	\$27,000	\$38,800

#### Budget Narrative:

##### 1. Personnel: Project Coordinator

Coordinate all activities of the Youth Program such as setting meeting schedules, contacting students, preparing materials for meetings, scheduling trainers, etc.

10hrs/week x \$20/hr. x 40 weeks = \$8,000

##### 2. Meetings: 10 meetings x \$200/meeting for food, drinks, snacks. There are 40 students per meeting. Cost per student is \$5 x 40 students = \$2,000

##### 3. Training and Education: Honoraria for 10 trainers/presenters x \$200/trainer = \$2,000.

##### 4. Materials & Supplies - paper, binders, pens, etc. for meetings, activities, events.

40 students x \$40 per student = \$1,600.

##### 5. Workbooks: Leadership training workbooks costs \$30 each x 40 students = \$1,200

##### 6. Facility cost – Room cost at a nonprofit agency is \$100/hour x 3 hours per meeting x 10 meetings = \$3,000

##### 7. Grantmaking – Grant awards to nonprofit youth agencies. Maximum \$2500/agency x 8 = \$20,000

##### 8. Youth Recognition Event – end of the year event for students and grantees.

100 attendees x \$10/person = \$1,000



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

### *Secured/Awarded*

<b>Name of Funder: Foundation, Corporation, Government</b>	<b>Amount</b>
Weingart Foundation	\$25,000
Foundation For Better Education	\$20,000
Kramer Family Foundation	\$10,000
Toyota Motor Sales, USA	\$10,000
Beightler Squires Charitable Trust	\$6,000
Wells Fargo Foundation	\$5,000
Western Digital Foundation	\$5,000
Cathay Bank	\$2,500

### *Pending*

<b>Name of Funder: Foundation, Corporation, Government</b>	<b>Amount</b>	<b>Decision Date</b>
<i>Opus Foundation</i>	<i>\$20,000</i>	<i>4/30/2017</i>
<i>J.P. Morgan Chase (Corporation)</i>	<i>\$15,000</i>	<i>6/1/2017</i>
<i>PIMCO Foundation</i>	<i>\$15,000</i>	<i>8/1/2017</i>
<i>Fred Hartley Foundation</i>	<i>\$10,000</i>	<i>4/30/2017</i>
<i>Sunwest Bank Foundation</i>	<i>\$10,000</i>	<i>6/1/2017</i>
<i>Kiwanis Cal-Nev-Ha Foundation</i>	<i>\$10,000</i>	<i>6/1/2017</i>

**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.

<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>	<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>
Contributions	\$114,738	17%	Program Fees	\$28,748	4%
Fundraising/Special Events	\$61,316	9%	Interest Income	\$0.00	0%
Corp/Foundation Grants	\$87,822	13%	Other: Capital Campaign	\$100,000	15%
Government Grants	\$0.00	0%	Other: In-Kind Donations	\$287,142	42%

**Notes:**

Capital Campaign: Currently FPOC is in the process of purchasing a residential building that will be used to expand our transitional housing program.

In-Kind: FPOC receives a great amount of in-kind support from our local community. This includes: use of donated spaces in local congregations for families to sleep in, donated office space for meetings, 11,000 hours of volunteers support, 10,000 prepared meals, donated vehicles, furniture, and supplies.

## 2017 S.L. Gimbel Foundation APPLICATION

### VII. Financial Analysis

Agency Name: Family Promise of Orange County, Inc.

Most Current Fiscal Year (Dates): From 1/1/2015 To: 12/31/2015

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

### Form 990, Part IX: Statement of Functional Expenses

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$288,564	\$239,807	\$25,884	\$22,873

**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%	83.1%	9.0%	7.9%

**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
6%	9%	3 %

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
\$187,177	\$0.00	0.00	187,777

### Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end (2016)	Excess or (Deficit) Prior fiscal year end (2015)
\$5,494*	\$5,890

**Notes:** In 2016, we were given an additional \$100,000 as part of a capital campaign to purchase a new shelter facility. All capital campaign funds are kept separate from our operating budget, but will be reported in our 2017 tax reports. Our operating surplus for the year was \$5,594.

### 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), budget page and budget narrative (see sample) and sources of funding, financial analysis page	X	A copy of your current 501(c)(3) letter from the IRS
X	Your current operating budget and the previous year's actual expenses (see sample Budget Comparison)	X	A copy of your most recent year-end financial statements (audited if available; double-sided)
X	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	X	A copy of your most recent 990 ( double-sided)
	For past grantees, a copy of your most recent final report.	X	A list of your Board members and their affiliations



**Organizational Budget**  
**Family Promise of Orange County, Inc.**

<b>REVENUE</b>	<b>Revenue &amp; Expenses 2016</b>	<b>Budget 2017</b>
Individual Contributions	\$ 114,738	\$ 112,728
Foundation Grants	\$ 56,611	\$ 85,000
Program Service Fees (Transitional Shtr)	\$ 28,748	\$ 25,000
Development/Fundraising Revenue (EVENTS)	\$ 61,273	\$ 66,000
Corporate Support	\$ 31,211	\$ 21,500
In-Kind Gifts	\$ 287,143	\$ 300,000
<b>CASH REVENUE</b>	<b>\$ 292,581</b>	<b>\$ 310,228</b>
<b>REVENUE WITH IN-KIND</b>	<b>\$ 579,724</b>	<b>\$ 610,228</b>
<b>SALARIES</b>		
Executive Director	\$ 66,970	\$ 74,000
Case Manager	\$ 42,532	\$ 47,476
Operations Manager	\$ 20,834	\$ 22,320
Bookkeeper	\$ 6,000	\$ 6,000
Payroll Taxes & Processing	\$ 13,352	\$ 14,229
Worker's Comp	\$ 5,083	\$ 5,083
LCSW Supervision - Contracted Svc.	\$ 2,100	\$ 2,400
<b>TOTAL SALARIES AND BENEFITS &amp; TAXES</b>	<b>\$ 156,871</b>	<b>\$ 171,508</b>
<b>OPERATING COSTS</b>		
Equipment Costs (Network Van)	\$ 7,355	\$ 8,000
Property and Liability Insurance	\$ 4,550	\$ 5,000
Rent & Utilities	\$ 48,825	\$ 49,420
Books & Reference	\$ 269	\$ 600
Computer Equipment & Repair	\$ 206	\$ 1,000
Postage & Printing	\$ 1,792	\$ 1,500
Family Resource Center General Supplies	\$ 3,971	\$ 3,500
Telephone (Landline & Cellular)	\$ 2,643	\$ 4,000
Program Dues - FP National	\$ 5,006	\$ 3,250
Annual Independent Review/Taxes	\$ 3,563	\$ 4,800
Volunteer Appreciation	\$ 384	\$ 600
Guest Services (Rental Assistance & Misc.)	\$ 10,623	\$ 14,000
Travel/Mileage/National Convention	\$ 4,625	\$ 5,350
Grantwriter Expenses	\$ 4,275	\$ 7,200
Event Expenses	\$ 29,350	\$ 27,500
Bank Service Charges	\$ 2,779	\$ 3,000
In-Kind (Offset)	\$ 287,143	\$ 300,000
<b>TOTAL OPERATING COSTS</b>	<b>\$ 417,359</b>	<b>\$ 438,720</b>
<b>CASH EXPENSES</b>	<b>\$ 287,087</b>	<b>\$ 310,228</b>
<b>TOTAL EXPENSES (In-Kind Offset)</b>	<b>\$ 574,230</b>	<b>\$ 610,228</b>
<b>SURPLUS/DEFICIT</b>	<b>\$ 5,494</b>	<b>\$ -</b>

**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 domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.	4,199.	4,199.		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	67,533.	54,120.	0.	13,413.
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	62,162.	52,816.	9,346.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	991.	862.		129.
10 Payroll taxes	11,321.	9,329.	826.	1,166.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	4,575.		4,575.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)				
12 Advertising and promotion				
13 Office expenses				
14 Information technology				
15 Royalties				
16 Occupancy	43,920.	43,920.		
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	3,577.	3,577.		
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	6,838.	6,838.		
23 Insurance	8,913.	3,500.	5,413.	
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>DONATED FOOD AND GOODS</u>	32,373.	32,373.		
b <u>GUEST SERVICE</u>	10,002.	10,002.		
c <u>GRANT WRITING</u>	8,165.			8,165.
d <u>VAN OPERATING COSTS</u>	8,101.	8,101.		
e All other expenses.	15,894.	10,170.	5,724.	
25 Total functional expenses. Add lines 1 through 24e.	288,564.	239,807.	25,884.	22,873.
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).				



Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS

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Vice Chair of the Board

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Chief Financial Officer

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Paul Granillo

Stanley Grube

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Nefertiti Long

Kirtland Mahlum

Brian McDonald

Meredyth "Charlie" Meredith

Susan Ovitt

Teresa Rhyne

Kathleen Sawa

Philip Savage IV  
Immediate Past Board Chair

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Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Paula Myles  
Interim President and CEO

July 21, 2017

*S. L. Gimbel Foundation Fund*

Mr. Casey Crosbie  
Executive Director  
Family Promise of Orange County, Inc.  
161 South Orange Street  
Orange, CA 92866

Dear Mr. Crosbie:

Congratulations! A grant has been approved for **Family Promise of Orange County, Inc.** in the amount of **\$17,500.00** from the S.L. Gimbel Foundation. **The performance period for this grant is August 1, 2017 to July 31, 2018.** 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:

*Provide emergency shelter families with financial literacy training*

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 agreement and return with original signature to The Community Foundation by Friday, August 25, 2017.** Be sure copy the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. **The Grant Evaluation is due by August 15, 2018** and a copy will be available online.

We wish you great success and look forward to working with you during the grant performance period. If you have any questions, please feel free to contact me at 951-241-7777.

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

23472 Family Promise of Orange County, Inc.

20170376 GIMB





## 6. Publicity

The Community Foundation appreciates publicity for the grant in all relevant published materials, such as brochures, newsletters and annual reports. The credit line of "Made possible in part by a grant from **"The Community Foundation, Strengthening Inland Southern California through Philanthropy"** is suggested. The Grantee will allow the Foundation to review and approve the content of any proposed publicity concerning the grant prior to its release, upon request. When your donors are listed in printed materials, include the Foundation in the appropriate contribution size category. Sending a brief press release to your local paper is appreciated. Please email Charee Gillens, our Marketing & Communications Officer, at [cgillens@thecommunityfoundation.net](mailto:cgillens@thecommunityfoundation.net) with copies of any printed or publicity materials that highlight the grant. 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 a logo is also appreciated. Our logo can be downloaded on our website at [www.thecommunityfoundation.net](http://www.thecommunityfoundation.net).

Grantee agrees to allow the Foundation to include information about this grant in the Foundation's periodic public report, newsletter, news releases, social media postings, and on the Foundation's website. This includes the amount and purpose of the grant, any photographs you have provided, your logo or trademark, and other information and materials about your organization and its activities.

## 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, modify or withhold payments under this grant award, require a total or partial refund of any grant funds, or all 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; d) the Grantee fails to comply with the requirements of any law or regulation applicable to you, the Foundation, or this grant.

## 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.



Signature



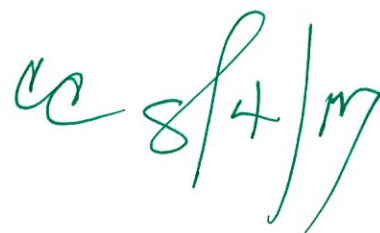
Printed Name

Organization: Family Promise of Orange County, Inc.

Grant Number: 20170376

7/31/17  
Date

Executive Director  
Title



GIMBZ  
AV  
8/7/17



Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS August 9, 2017

*S. L. Gimbel Foundation Fund*

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*Chair of the Board*

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*Vice Chair of the Board*

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Beverly Stephenson

Randall Tagami

Diane Valenzuela

Paula Myles  
*Interim President and CEO*

Mr. Casey Crosbie  
Executive Director  
Family Promise of Orange County, Inc.  
161 South Orange Street  
Orange, CA 92866

Dear Mr. Crosbie:

The Community Foundation is pleased to enclose a grant check for \$17,500.00 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 August 15, 2018** 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: *"Family Promise of Orange County, Inc. is supported by a grant from The S. L. Gimbel Foundation."* You may send us copies of articles printed in local papers, stories in your agency newsletter, annual report, press releases, and other publications for our files.

Please feel free to contact me at 951-241-7777 should you have any questions.

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

20170376

42712

GIMB2



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

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

ETZ22444 Check Fraud  
Protection for Business

42712

PAY \* Seventeen Thousand Five Hundred and no/100 \*

TO THE  
ORDER OF

DATE

08/08/2017

AMOUNT

\$ \*\*\*\*17,500.00

Family Promise of Orange County, Inc.  
161 South Orange Street  
Orange, CA 92866

*[Signature]*  
AUTHORIZED SIGNATURE

⑈042712⑈ ⑆22234449⑆ 244124437⑈

The Community Foundation

42712

23472 Family Promise of Orange County, Inc.

08/08/2017 042712

20170376	07/20/2017	Provide emergency shelter families with financial	17,500.00
GIMB	S.L. Gimbel Foundation Advised Fund		17,500.00

CHECK TOTAL: \$ \*\*\*\*17,500.00

The Community Foundation

42712

23472 Family Promise of Orange County, Inc.

08/08/2017 042712

20170376	07/20/2017	Provide emergency shelter families with financial	17,500.00
GIMB	S.L. Gimbel Foundation Advised Fund		17,500.00

CHECK TOTAL: \$ \*\*\*\*17,500.00