



**2016 S.L. Gimbel
Foundation Fund
Grant Application
Riverside & San Bernardino**

Internal Use Only:
Grant: 20160618

GRANT ID: 631
\$ 75,000
10/25

Organization / Agency Information

Organization/Agency Name: Foothill Family Shelter		
Physical Address: 1501 W. Ninth St. Ste. D		City/State/Zip Upland, CA 91786
Mailing Address: 1501W. Ninth St. Ste. D		City/State/Zip Upland, CA 91786
CEO or Director: Megan Nehamen		Title: Co-Executive Director
Phone: 909-920.0453	Fax: n/a	Email: megan@foothillfamilyshelter.org
Contact Person: Megan Nehamen		Title: Co-Executive Director
Phone: 909.920.0453	Fax: n/a	Email: megan@foothillfamilyshelter.org
Web Site Address: www.foothillfamilyshelter.org		Tax ID: 33-0341818

Program / Grant Information

Interest Area: Animal Protection Education Environment Health Human Dignity

Program/Project Name: Stepping Stones 120-Day Housing			Amount of Grant Requested: \$75,000
Total Organization Budget: \$727,952	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 87%	Per 990, Percentage of Management & General Expenses Only (Column C/ Column A x 100): 10%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 13%
Purpose of Grant Request (one sentence): To provide shelter and comprehensive services to homeless men, women and children			
Program Start Date (Month and Year): November 2016		Program End Date (Month and Year): November 2017	
Gimbel Grants Received: List Year(s) and Award Amount(s)			
2013	\$10,000	<u>> NON-GIMBEL</u>	
2012	\$6,612		

Signatures

Board President / Chair: (Print name and Title) Malisa Day - Board President	Signature: <i>Malisa Day</i>	Date: 7/15/16
Executive Director/President: (Print name and Title) Megan Nehamen Co-Executive Director	Signature: <i>Megan Nehamen</i>	Date: 7/15/16

2016 S.L. Gimbel Foundation Fund APPLICATION

Narrative

Please provide the following information by answering **ALL** questions (I to IV) in **Eight (8) typed pages maximum, 12 Font, One Inch Margins**. Use the format below (I to IV). Type the questions. Answer 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?

FFS was founded by the St. Mark's Episcopal Church in 1984. The congregation identified a significant need in the community, which was not being addressed; homelessness. The goal was to provide emergency overnight shelter to homeless families with children. In 1984, a motel room with a kitchenette was rented on a weekly basis, allowing us to provide shelter and food. In 1987 and 1988, 2 four-unit apartment buildings were acquired through the State ESP (Emergency Shelter Program). In 2002, an additional four-unit building was purchased from the City of Upland. In 2005, 2 more four-units were purchased, giving the Foothill Family Shelter a total of 28 two bedroom apartments; in seven four-unit buildings. FFS offers clean, safe housing in two-bedroom apartments in conjunction with comprehensive support services. The goal is to meet the immediate needs of people in crisis, as well as promote new behavior. FFS focuses on employment preparation, financial education, mandatory savings program, professional counseling, parenting education, basic life skills and literacy development. Participants achieve measurable success due to staff's implementation of individual housing and treatment plans, which outline goals and action steps so that participants secure permanent housing, achieve employment success, and maintain significant savings.

The mission of the Foothill Family Shelter (FFS) is to assure children and adults a future by helping them acquire skills that will enable them to maintain a home, job and at the same time develop the necessary self-esteem to function as a successful stable adult. Our vision is for at-risk families to have a safe place to live and be able to meet their basic need of food, clothing and shelter. Our goal is to keep families together and provide stability, an important aspect for homeless families that may not know where they will spend their next night or where their next meal is coming from.

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

The success of any program established to assist homeless families is ultimately measured by the success of clients who move from homelessness to homes of their own and productive lives in the community. Foothill Family Shelter is proud of helping over 2,000 people gain autonomy and self-sufficiency in their own homes over the agency's 32-year history. Nonetheless, it is gratifying to receive commendations from clients, community leaders, and funders for effectiveness in providing these services. Two honors are particularly meaningful: the Yawa' Award presented by the San Manuel Band of Mission Indians in March 2013 and the Non-Profit of the Year Award presented by Claremont Chamber in 2015. In March of 2015 Foothill Family Shelter opened Foothill Family Thrift Store; the ultimate benefit is to generate funds in support of programs and services, but in less than 15 months, we've realized there are many more benefits. Our community is more engaged, Foothill Family Shelter is more visible in the community, we've developed many new volunteer opportunities and it's an affordable shopping experience for those within our community.

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

Foothill Family Shelter (FFS) offers clean, safe housing in two-bedroom apartments in conjunction with comprehensive support services. The goal is to meet the immediate needs of people in crisis, as well as promote new behavior. FFS focuses on employment preparation, financial education, mandatory savings program, professional counseling, parenting education, basic life skills and literacy development. Participants achieve measurable success due to staff's implementation of individual housing and treatment plans, which outline goals and action steps so that participants secure permanent housing, achieve employment success, and maintain significant savings. FFS provides a Food Pantry for our homeless families and for low income families in our service area. We distribute canned foods and non-perishable food items to 300 families per month. FFS also provides diapers, wipes and personal hygiene items for these families.

FFS offers a 9-week incentive based parenting program for young mothers, ages 14-21. This program is offered 3 times during the year and assists approximately 60 girls.

Our designated service area is: Upland, Ontario, Montclair, Claremont, Rancho Cucamonga and Pomona. We house homeless men, women and children and serve. Our food pantry/clothing closet is made available to homeless and/or low-income men, women and children within our service area.

II. Project Information:

A) Statement of Need

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

FFS's vision is to improve the lives of homeless families that reside in our service area. FFS provides services to communities in the east end of Los Angeles County and the west end of San Bernardino County. The cities that receive our services include Upland, Rancho Cucamonga, Ontario, Montclair, Claremont and Pomona. Our target populations are families that are homeless, and require their basic needs of shelter, food and clothing. The need for our Shelter continues to remain constant.

Transitional living is very limited in our service area. At each application day, held at least 4 times per year, we receive 10 applicants for every 1 apartment that is available. In June, 2016 we had just 3 openings and 35 qualified applicants. Foothill Family Shelter is seeking funds to assist homeless families increase their income, learn the skills they need to lead responsible lives and have the means to successfully transition into permanent housing. The majority of the clients selected for Foothill Family Shelter are currently employed, but they are the "working poor." These folks do not earn a living wage and many receive aid to supplement their income. We also know there is a growing population of working poor. "In 2013, 8.6% of the civilian labor force was 16 and older who were employed were living in poverty."

According to the 2015 Community Indicators Report, "public income support, food subsidies, no-cost health insurance coverage and other supports provide a critical safety net to those living in or at-risk of poverty and those returning from active military service." While CalWORKs enrollment did not change much from 2013/2014 and 2014/2015, it is down 13% from the peak in 2010/2011. According to the report, 7.5% of the 1.33 million California households receive cash public assistance or CalFresh in San Bernardino County. "Most (66%) of CalFresh recipients are children and half of CalWORKS recipients are children." Furthermore, our approach is holistic and we work closely with the adults and children. "Poverty can have negative health impacts for both children and adults." Children growing up in impoverished households are at increased risk for lower cognitive abilities, lower school

achievement, and poorer development. Fifty-two percent (52%) of the Foothill Family Shelter residents are headed by single parents: 45% by women, and 7% by men. As noted in the 2015 Community Indicators Report, female-headed households have the highest poverty rate at 33.6% and for those female-headed households with young children under five years of age, the poverty rate increases to 47%.

- The percentage of families living in poverty has increased five percentage points, from 10.9% of San Bernardino County residents living in poverty in 2007 to 16% in 2013
- The percentage of adults living in poverty also grew from 11.8% in 2007 to 17.5% in 2013
- San Bernardino County's rate of family poverty is higher than the state and national averages
- The rate of poverty is significantly higher-and growing-for San Bernardino County families whose head of household does not have a high school diploma, from 21.0% living in poverty in 2007 to 30.8% living in poverty in 2013

A staggering 34,955 households were waiting for rental assistance in 2015; Foothill Family Shelter provides the necessary resources to help families upgrade, improving their situations and essentially eliminate the need for rental assistance.

The Inland Empire of Southern California is a large geographic area with many unmet needs and few community resources. While the area has always ranked low in income, education attainment, employment opportunities, housing and other economic indicators, San Bernardino and Riverside Counties were particularly impacted by the recent economic downturn. The above data paints a picture of life in the six communities (Upland Claremont, Montclair, Ontario, Pomona, and Rancho Cucamonga) served by Foothill Family Shelter.

B) Project Description

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

PROGRAM/PROJECT DESCRIPTION:

To break the cycle of homelessness, FFS provides an opportunity for at-risk families to become self-sufficient. Our agency is unique as it provides 120-days of rent-free living in a fully furnished 2-bedroom apartment for the homeless population. FFS is comprised of 28 apartment units located on a contiguous site in Upland, which include 8 units of 120-day housing, our Stepping Stone Program. 12 units are designated for the 1 year program and 8 units are for permanent housing. We require strict guidelines for our residents to follow so they will be successful. In lieu of rent, we ask our residents for a change in behavior. They are required to save 50% of their income that is placed into a trust account. Residents must attend mandatory weekly meetings with both their case manager and counselor. They are also required to volunteer 2 hours per month, to give them a "sense of community" and an opportunity to "pay it forward". Clients are expected to fully participate in each service: weekly case management (clients identify short and long term goals, learn how to manage their dollars, create a budget, engage in financial literacy workshops and learn how to manage a household; weekly therapy allows clients to gain self-confidence, increase their self-esteem, work through mental health issues caused by homelessness and gain coping techniques to deal with life's challenges and obstacles. We also provide employment services; clients meet weekly with our Job Developer while actively seeking employment and monthly if currently employed, but seeking opportunities to upgrade their current status (the desire to increase wages or hours). Included in our

employment services are: resume development, mock interviews, job search skills and employment leads. Children's enrichment programs include: family activities (Make and Take A Pumpkin, Breakfast With Santa, Spring Party, Thanksgiving Feast and a Family Night at Quakes Stadium) and afterschool tutoring in partnership with School on Wheels tutoring.

This unique model provides families with an opportunity to live privately and independently, while dealing with homelessness. Our Shelter allows families to manage and maintain their own household, with the support and guidance from our client service team. Clients are motivated, confident and determined to succeed.

C) Project Goal, Objectives, Activities and Expected Outcomes

1. State **ONE** project goal. The **Goal** should be an aspirational statement, a broad statement of purpose for the project.

Our goal is to keep families together and provide stability, an important aspect for homeless families that may not know where they will spend their next night, in addition to providing critical services that will help transition these families from homelessness to stable permanent housing.

2. State **One to Three objectives**. Objectives should be specific, measurable, action-oriented, realistic, and time-specific (SMART) statements intended to guide your organization's activities toward achieving the goal.

Specify the activities you will undertake to meet each objective and number of participants for each activity.

Expected outcomes are the individual, organizational or community-level changes that can reasonably occur during the grant period as a result of the proposed activities or services. What are the key anticipated outcomes of the project and impact on participants?

Use the following format for your objectives, respective activities and expected outcomes:

Objective I: Clients will learn money management skills with the expectation of saving 50% of their income

Activities: Weekly Case Management sessions, develop a budget (reviewed/adjusted regularly) and receive groceries from our food pantry to minimize household expenses

Expected Outcomes: 70 adults will be financially stable and prepared to secure permanent housing because they participated in our mandatory savings program. On average, clients save \$2,000 during the 120-day Stepping Stones Program

Objective II: Clients will secure and /or upgrade employment to increase their earned income

Activities: Employment services; resume development, mock interviews, job leads, job search skills, interview etiquette and access to appropriate interview attire from our clothing closet and thrift store

Expected Outcomes: 61 adults will effectively secure and maintain employment in order to prevent future homelessness

Objective III: Clients will improve their mental health and well-being to live a sustainable and independent life after the completion of our 120-day Stepping Stones Program. Children will also improve their overall well-being; socially, emotionally and academically.

Activities: Weekly counseling sessions with their assigned therapist, Process Group, depression survey, on-site afterschool tutoring, Kids Club and children's enrichment activities

Expected Outcomes: 70 adults will exit Stepping Stones having new skills to live a well-balanced life: healthy relationships, appropriate boundaries, parenting education, self-

worth/self-confidence. They will also break down any barriers from past issues that may have led to their homelessness. 70 school-aged children will become self-confident and overcome the emotional trauma triggered by homelessness.

D) Timeline

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

The Stepping Stones Program is cyclical and runs year round. We begin screening potential incoming clients as we are preparing clients to exit once they've completed their 120-days. We provide 3 cycles of housing each year. This project request is for November 1, 2016 to November 30, 2017.

Step 1: Screen, interview and review applicants for 120-day housing (on average, 50 qualified families competitively apply). Applications are expected to be taken in early November

Step 2: Conduct Intake; a second interview the following week. If applicants are being considered, they are immediately sent for drug testing

Step 3: Notify families of their acceptance into our program; schedule a move-in date

Step 4: Move client in and set-up appointment with case manager and counselor

Step 5: For 120-days client is engaged in the Stepping Stones Program, meeting all program requirements, including saving 50% of their income, while preparing an exit plan. Client service team works with clients to assure they have the skills and resources to succeed.

- Meet with Case Manager weekly
- Meet with Counselor weekly
- Meet with Job Developer to secure or upgrade employment (develop resume, mock interview skills)
- Save 50% of their income
- Access to food pantry and clothing closet
- Attend all scheduled workshops, Process Group and mandatory family activities

Step 6: At the end of the 120-days clients will transition out of the Stepping Stone Program and we will assist them in securing permanent housing. We then select new families to enter the program.

E) Target Population

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

This grant will serve homeless men, women and children from within our service area. 160 individuals (32 families) will be housed; 70 adults and 90 children.

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?

Although there is a great need for homeless assistance in our community, there are not many resources for families. Foothill Family Shelter continues to work collectively with our fellow service providers to ensure our community-wide resources are known and made available to those in need. While there are several other organizations that provide housing in the surrounding area, each organization provides

shelter for a different population; Inland Valley Hope Partners, House of Ruth, Pacific Lifeline and Mercy House. FFS shelter networks with these organizations and shares information trying to assist as many homeless clients as we can. Most recently we participated in the Community Connect event on May 7, 2016; we participate in the Upland Homeless Stakeholders meetings and network and share resources whenever possible. Volunteers are used on a daily basis; with over 50 active volunteers each one plays a vital role in the success of our organization. Volunteers assist with our Help Desk; answering phone calls, distributing food and clothes, and providing resources. Other volunteers work directly in the food pantry, shelving food, checking expiration dates and receive incoming donations. Volunteers assist with childcare, administrative duties, fundraising, maintenance at the shelter and assist at the thrift store. We also work with clinical interns who work directly with our clients, under the direct supervision of our Licensed Clinical Social Worker.

F) Evaluation

How will progress towards the objectives be tracked and outcomes measured?

The impact will be measured by the number of families (adults and children) that graduate from our program and find permanent stable living conditions. Foothill Family Shelter uses HMIS (home management information system), a data based required by all HUD funded housing organizations. HMIS provides a system to keep track of the number of families that move into our program and graduate. HMIS statistics includes family members, (adults and children) their ages, ethnicity, income level, and case notes from the counselors and case managers on their progress. Participants are required to meet with their Case Manager and Counselor once a week. Our Licensed Clinical Social Worker facilitates a client service meeting twice a month to assure clients are on track, meeting their expectations and complying with all aspects of the program.

G) Use of Grant Funds

How will you use the grant funds?

Funds will be used to support the 120-day Stepping Stones Program. This includes salaries for the case managers and counselor, drug screenings, utilities, maintenance and repairs for the 8 units.

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.

The vitality of this program is critical and until there is a solution to end homelessness, the demand for our services will always be high. Our Board of Directors, Co-Executive Directors and Fund Development Committee are constantly seeking new and innovative ways to generate funds. Each year we hold a Fall luncheon and a Spring Gala; these events will generate a significant amount of money as will our annual Holiday Appeal. We work with local service clubs and have inside and outside events year round; we try to have one event each month (without inundating our supporters or exhausting our resources). Our thrift store will also serve as an income producing entity. Foundation grants are imperative; we continually seek new opportunities, connect with funders and try to develop relationships to assure future support.

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?

Our Board of Directors is currently comprised of 13 members; some of whom are business professionals and others are retired. Our Board maintains the fiduciary responsibilities for the operation of the Foothill Family Shelter and our Executive Committee works closely with the Co-Executive Directors in setting forth the vision, along with an implementation plan. The responsibilities are outlined in our by-laws and policies manual which are reviewed and updated regularly. Our Board of Directors meets once a month; recommendations come from committees or the Co-Executive Directors; decisions are adopted through a formal vote.

Current committees:

Personnel, Finance, Maintenance, Fundraising, Strategic Plan, Nominating and Thrift Store.

B) Management

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

Megan Nehamen; Co-Executive Director/Community Development Director--is a 12-year veteran of the Shelter. She received a Bachelor's degree in Sociology from Cal State Fullerton and is a gifted public relations fundraiser. She also has experience doing case management and program development.

Bonnie Cole; Co-Executive Director/Accountant: --Bonnie Cole has been at the Foothill Family Shelter since 2009. She has over 30-years of accounting experience in government, for-profit, and non-profit organizations. Bonnie provides insightful financial planning and oversight.

Andrea Heitz; Licensed Clinical Supervisor LCSW—Andrea has many years serving as an LCSW. Along with her extensive experience and education, she brings compassion and dedication to Foothill Family Shelter. She leads our client service team, navigating them through the hurdles of providing resources for such a vulnerable population. She also provides supervision for our on-site interns who deliver therapy and case management.

Shauna Kelly; Lead Case Manager: Shauna Kelly is an experienced case manager with a special sensitivity to homeless persons and their issues. She has served the staff and residents of the Shelter since 2001.

Bethany Meichsner ; Therapist MFT: Bethany completed her internship and was hired on as a therapist/parenting coordinator in 2013. She meets with clients on a regular basis and helps them through the struggles of homelessness. She conducts individual therapy sessions and couples therapy. She also facilitates a process group. Bethany has a Master of Science degree in Psychology from California State Polytechnic University, Pomona.

Robert Tristan; Therapist/Job Developer: Robert works closely with our clients to explore employment opportunities. He helps clients navigate the employment search process and prepares them to confidently apply for positions. He prepares clients for the work force; job search, resume development, mock interviews, and provides tips to maintaining a job. He focuses his efforts on linking clients to job opportunities by maximizing the relationships he forms throughout the community. Robert has a Master of Science degree in Marriage and Family Therapy from California State Polytechnic University, Pomona.

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V. Project Budget and Narrative

A) **Budget Table:** Provide a detailed line-item budget for your **entire** project by completing the table below. Requested line items should be limited to Ten (10) line items. The less the better.

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

- 1) Line item requests for materials, supplies, equipment and others:
 - a. Identify and list the type of materials, supplies, equipment, etc.
 - b. Specify the unit cost, number of units, and total cost**
 - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff compensation, benefits: **Do not use FTE percentages.**
 - a. Identify the position; for each position request, **specify the hourly rate and the number of hours** (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
 - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)
- 3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above: Provide rate of pay per hour and number of hours.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Accountant	20 hours/week x \$30/hour x 50 weeks = \$30,000	12,500	17,500	0	30,000
Property Mgr	10 hours/week x \$25.20 x 50 weeks = \$12,600	600	12,000	0	12,600
Clinical Supervisor	25 hrs/month x \$60 x 12 months = \$18,000	4,000	4,800	9,200	18,000
Case Managers	20 hrs/week x \$26.80 x 50 weeks = \$26,800	400	6,500	25,750	26,800
Counselors	20 hrs/week x \$26.80 x 50 weeks = \$26,800	400	6,500	25,750	26,800
Job Developer	10 hrs/ week x \$20 x 50 weeks = \$10,000	0	2,200	7,800	10,000
Office Supplies	12 months x \$125 = \$1500	500	1,000	0	1,500
Printing	Copier lease 12 months x \$450 = \$5400 + 36 cases of paper x \$30 = \$1,080 for a total of \$6500	3,000	2,980	500	6,480
Utilities	8 apartments x \$130/month x 12 months = \$12,480	4,000	4,480	4,000	12,480
Rent: Office Space & Food Pantry	Facility Costs \$1400/month x 12 months	8,000	8,800	0	16,800
Insurance	1 apartment annual premium \$725 x 8 apartments	1,000	4,800	0	5,800
Maint/Repairs	8 apartments \$125 each x 12 months = \$12000	5,000	5,000	2,000	12,000
TOTALS:		39,400	64,860	75,000	179,260

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

Budget Narrative:

1. Clinical Supervisor
Attends and leads client services meetings, Supervises Clinical Interns, assists with interviews on application days.
25 hr/month x \$60 hr. x 12 months = \$18,000
2. Case Managers
Meets with each client/household weekly to review personal budget and address credit issues or other financial literacy needed. Supports client with referrals for other services needed (medical/dental/food stamps/WIC)
20 hrs/week x \$26.80 x 50 weeks = \$26,800
3. Counselors
Meets with each client weekly for therapy, addressing issues of family disfunction/depression/parenting skills.
20 hrs/week x \$26.80 x 50 weeks = \$26,800
4. Job Developer
Meets with clients to assist in job search/resume development or investigates ways to increase employment income with more hours or upgrades. Maintains relationships with local employers for job leads.
10 hrs/week x \$20hrs. x 50 weeks = \$10,000
5. Communications (Printing/Copying)
Copier lease is \$450/month x 12 month = \$5,400 + 3 cases of paper/month = 36 cases of paper x \$30 = \$1,080
6. Utilities: **Foothill Family Shelter pays all utilities for our 120 clients – allowing them to save maximum dollars in preparation for their exit into permanent housing.**
Gas/Electric/Water/Trash Sewer @ \$130/month x 8 apartments x 12 month = \$12,480
7. Maintenance/Repairs: **Each apartment is thoroughly cleaned and treated for pest prevention before new clients move in.**
Monthly budget for general upkeep @ \$125/month x 8 apartments x 12 months = \$12,000

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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
City of Upland	\$14,000
City of Ontario	\$6,200
City of Claremont	\$3,000
City of Montclair	\$1,000
Inland Empire United Way	\$25,000
Ontario Community Foundation	\$15,000

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
<i>Mazda Foundation</i>	<i>\$10,000</i>	<i>November 2016</i>
<i>Union Bank</i>	<i>\$10,000</i>	<i>October 2016</i>
<i>Majestic Realty Foundation</i>	<i>\$10,000</i>	<i>October 2016</i>
<i>EFSP</i>	<i>\$31,000</i>	<i>December 2016</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.

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$104,271	19	Program Fees	\$97,029	17
Fundraising/Special Events	\$119,200	22	Interest Income	\$	
Corp/Foundation Grants	\$130,626	24	Other:	\$	
Government Grants	\$99,399	18	Other:	\$	

Notes:

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VII. Financial Analysis

Agency Name: Foothill Family Shelter

Most Current Fiscal Year (Dates): From July 2014 To: June 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
\$726,202	\$629,287	\$76,163	\$20,752

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%	86%	11%	3%

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

Percentage of Organization's <u>Current</u> Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
13 %	11%	2 %

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

Foothill Family Thrift Store opened in March 2015 and the start-up costs were higher than anticipated. Foothill Family Shelter has been funding this entity as we are committed to a non-negotiable lease. Reserves were depleted and this caused a significant shortfall. We have seen a positive trend over the past fourth months and see a recovery in sight.

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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
\$90,884	\$23,599	\$66,069	1

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$-175,677	\$-45,032

Notes: During 2014-2015 we had high start-up expenses with staffing and other expenses needed to accommodate the needs of the Thrift Store. During 2015-2016 which has just closed but not yet been audited our loss is less than \$50,000, including the Thrift Store. We recently have decided to utilize more volunteers and less paid staff. The projections for 2016/2017 are break-even as we pay down debt and re-build reserve funds.

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	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 (see sample Budget Comparison)	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.	

2016/2017 Board of Directors



Malisa Day, *President*
Vice President/Senior Government
Relationship Manager
Bank of The West

Wanda K. Jones
Vice-President
Senior Vice President
Regional Commercial Banking Manager
Community Bank

Kitty Russo, *Treasurer*
Retired
School Teacher

Chris Watson, *Secretary*
Rep., St. Mark's Episcopal Church

Paul Gomez
Retired
Municipal Management

Margaret Grayson
Non-Profit Consultant

Jodene Holliday
Community Volunteer

Joseph Kolmel
Rep., St. Mark's Episcopal Church

Lynn Osorio
Pomona College

Theresa St Peter
Human Resources/
Risk Management Consultant

Bonnie Cole
Co-Executive Director

Megan Nehamen
Co-Executive Director

Budget Comparison

	Actuals Most Recently Completed Year	Budget Projections Current Year	Variance
Income	2014-2015	2015-2016	
Individual Contributions	104,271	122,430	18,159
Corporate Contributions	8,162	16,160	7,998
Foundation Grants	122,464	166,150	43,686
Government Contributions	99,399	66,410	-32,989
Other Earned Income	216,229	528,850	312,621
Other Unearned Income	0	0	0
Interest & Dividend Income	0	0	0
Total Income	550,525	900,000	349,475
Expenditures			
Personnel			
Salary Co-Executives	35,871	36,000	129
Salary – All other staff	299,084	326,270	27,186
Payroll Taxes	46,139	48,950	2,811
Insurance - Workers' Comp	17,186	23,580	8,521
Insurance - Health	15,059	23,580	8,521
Payroll Services	1,298	650	-648
Retirement	390	0	-390
Total Personnel	415,027	454,500	39,473
General Program/Administrative			
Bank/Investment Fee	0	0	0
Publications	0	0	0
Conferences & Meetings	2,124	0	-2,124
Mileage	1,766	2,000	234
Audit & Accounting	9,920	9,500	-420
Program Consultants	0	0	0
Insurance Expense	4,279	4,500	221
Telephone Expense - Land Lines	4,025	4,500	475
DSL & Internet	0	0	0
Website	2,406	2,500	94
Office Supplies	3,562	3,000	-562
Postage & Delivery	1,611	2,000	389
Printing & Copying	6,500	6,500	0
Miscellaneous Depreciation/Shelter			
Expenses/Parenting Classes/TS Expenses	274,982	411,000	136,018
Total General Program/Administrative	311,175	445,500	134,325
Total Expenditures	726,202	900,000	173,798
Revenue Less Expense	-175,677	0	175,677

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				
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	129,802	77,123	35,871	16,808
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	206,841	203,344	3,497	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	32,245	27,028	3,657	1,560
10 Payroll taxes	46,139	38,164	5,591	2,384
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	9,920		9,920	
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.)	146	146		
12 Advertising and promotion				
13 Office expenses	8,002	4,565	3,437	
14 Information technology				
15 Royalties				
16 Occupancy	38,942	36,384	2,558	
17 Travel	1,837	1,660	177	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	2,124		2,124	
20 Interest	4,235	4,235		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	76,277	69,624	6,653	
23 Insurance	4,279	3,851	428	
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 SHELTER UTILITIES	35,405	35,405		
b PARENTING PROGRAMS	24,958	24,958		
c SHELTER REPAIRS	22,371	22,371		
d PROPERTY INSURANCE & TAXE	19,431	19,431		
e All other expenses	63,248	60,998	2,250	
25 Total functional expenses. Add lines 1 through 24e	726,202	629,287	76,163	20,752
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)				

Internal Revenue Service

Date: June 19, 2007

FOOTHILL FAMILY SHELTER INC
1501 W 9TH ST STE D
UPLAND CA 91786-5665 764

Department of the Treasury
P. O. Box 2508
Cincinnati, OH 45201

Person to Contact:
Mr. Morton 31-08703
Customer Service Representative
Toll Free Telephone Number:
877-829-5500
Federal Identification Number:
33-0341818

Dear Sir or Madam:

This is in response to your request of June 19, 2007, regarding your organization's tax-exempt status.

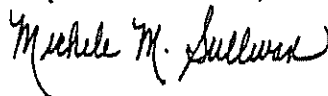
In April 1993 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under sections 509(a)(1) and 170(b)(1)(A)(vi) of the Internal Revenue Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

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

Sincerely,



Michele M. Sullivan, Oper. Mgr.
Accounts Management Operations 1



Strengthening Inland Southern California through Philanthropy



BOARD OF DIRECTORS

October 27, 2016

S. L. Gimbel Foundation Fund

Philip Savage IV
Chair of the Board

Ms. Megan Nehamen

Sean Varner
Vice Chair of the Board

Co-Executive Director

Pat Spafford, CPA
Chief Financial Officer

Foothill Family Shelter, Inc.

Sergio Bohon
Secretary of the Board

1501 West Ninth Street, Suite D

Upland, CA 91786

Dr. Paulette Brown-Hinds

Dear Ms. Nehamen:

Rabbi Hillel Cohn

Congratulations! A grant has been approved for Foothill Family Shelter Inc. in the amount of \$75,000.00 from the S.L. Gimbel Foundation. **The performance period for this grant is November 1, 2016 to October 31, 2017.** 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:

James Cuevas
Immediate Past Board Chair

To support Stepping Stones 120-Day Housing.

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

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, November 18, 2016.** Be sure to copy the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

Dr. Albert Karnig

D. Matthew Pim

Teresa Rhyne

Kathleen Sawa

Dr. Henry Shannon

Tamara Sipos

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 November 15, 2017** and a copy will be available online.

Beverly Stephenson

Randall Tagami

Diane Valenzuela

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 call me at 951-241-7777, ext. 114, or email me at ccudiamat@thecommunityfoundation.net.

Dr. Jonathan Lorenzo Yorba
President and CEO

Sincerely,

Celia Cudiamat

Executive Vice President of Programs

6131 Foothill Family Shelter Inc.

20160678

GIMB-75th



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



Strengthening Inland Southern California through Philanthropy

3700 Sixth Street, Suite 200

Riverside, CA 92501

P: 951-684-4194

F: 951-684-1911

www.thecommunityfoundation.net

**S. L. Gimbel Foundation Fund
Grant Agreement**

Organization: Foothill Family Shelter Inc.
Grant Amount: \$75,000.00 **Grant Number:** 20160678
Grant Period: November 1, 2016 to October 31, 2017 (*Evaluation is due November 15, 2017*)
Purpose: Stepping Stones 120-Day Housing

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.

Grant funds will not be expended for any political or lobbying activity or for any purpose other than one specified in section 170(c)(2)(b) of the Code.

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 legal or 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, for the purpose of conducting financial audits, making verifications, and investigations as deemed necessary concerning the grant.

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 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.

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.

Megan Nehemen
Signature

November 1, 2016
Date

Megan Nehemen
Printed Name

Co-Executive Director
Title

AV
11/4/16
2:55 PM

Grant Number: 20160678
Organization: Foothill Family Shelter Inc.

ec 11/4/16



Strengthening Inland Southern California through Philanthropy



November 23, 2016

BOARD OF DIRECTORS

Philip Savage IV
Chair of the Board

Sean Varner
Vice Chair of the Board

Pat Spafford, CPA
Chief Financial Officer

Sergio Bohon
Secretary of the Board

Dr. Paulette Brown-Hinds

Rabbi Hillel Cohn

James Cuevas
Immediate Past Board Chair

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Teresa Rhyne

Kathleen Sawa

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Ms. Megan Nehamen
Co-Executive Director
Foothill Family Shelter, Inc.
1501 West Ninth Street, Suite D
Upland, CA 91786

Dear Ms. Nehamen:

The Community Foundation is pleased to enclose a grant check for \$75,000 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 November 15, 2017 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.

Please feel free to contact Celia Cudiamat, Executive Vice President of Programs, at 951-241-7777, ext. 114, if you have any questions.

Dr. Jonathan Lorenzo Yorba
President and CEO

Sincerely,

Jonathan Lorenzo Yorba
Jonathan Lorenzo Yorba, Ph.D.
President and CEO

20160678

41555

GIMB75



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

The Community Foundation

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

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

Check Fraud Protection for Business

41555

PAY * Seventy-Five Thousand and no/100 *

TO THE ORDER OF

DATE

11/08/2016

AMOUNT

\$ ****75,000.00

Foothill Family Shelter Inc.
 1501 W Ninth Street, Suite D
 Upland, CA 91786



Jonathan Lorenzo Yorba
 AUTHORIZED SIGNATURE

Security features. Details on back.

⑈041555⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

41555

6131 Foothill Family Shelter Inc.

11/08/2016 041555

20160678 10/25/2016 Stepping Stones 120-Day Housing
 GIMB S.L. Gimbel Foundation Advised Fund

75,000.00
 75,000.00

CHECK TOTAL: \$ ****75,000.00

The Community Foundation

41555

6131 Foothill Family Shelter Inc.

11/08/2016 041555

20160678 10/25/2016 Stepping Stones 120-Day Housing
 GIMB S.L. Gimbel Foundation Advised Fund

75,000.00
 75,000.00

CHECK TOTAL: \$ ****75,000.00