

Organization / Agency Information

Organization/Agency Name: Laguna Canyon Foundation		
Physical Address: 384 Legion St., Laguna Beach, CA 92651		
Mailing Address: PO Box 4895. Laguna Beach CA 92652		
CEO or Director: Ms Hallie Jones Title: Executive Director		
Phone: (949) 497-8324	Fax:	Email: hallie@lagunacanyon.org
Contact Person: Alan Kaufmann		Title: Restoration Program Director
Phone: (949) 497-8324	Fax:	Email: alan@lagunacanyon.org
Web Site Address: http://https://lagunacanyon.org/		Tax ID: 33-0441816

Program / Grant Information

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

Program/Project Name: Laguna Ridge Trail Restoration Phase 2			Amount of Grant Requested: \$25,000
Total Organization Budget: \$1,410,276	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 82%	Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): 16%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 18%
Purpose of Grant Request (one sentence): Restore the middle section of Laguna Ridge Trail			
Program Start Date (Month and Year): 6/16/2018		Program End Date (Month and Year): 6/15/2019	
Gimbel Grants Received: List Year(s) and Award Amount(s) 2016 - \$23,553.00 2013 - \$25,000.00 2011 - \$25,000.00 2009 - \$10,000.00			

Celia Cudiamat

From: Sydney Jones <sydney@lagunacanyon.org>
Sent: Tuesday, June 12, 2018 4:52 PM
To: Celia Cudiamat
Subject: RE: Gimbel Foundation Grant Application
Attachments: Project Budget and Narrative.docx

Hi Celia,

Below is our revised 2018 S. L. Gimbel Foundation Grant Application. Thank you for allowing us the opportunity to clarify and revise our submitted application. I attached the revised budget and budget narrative below in the body of the email and also as an attachment. Please let me know if you have any questions or need anything else.

Thanks again, Celia!

Kind Regards,
Sydney Jones
Development Manager

2018 S. L. Gimbel Foundation Fund Grant Application
Welcome Page
Welcome to the 2018 S. L. Gimbel Foundation Fund Grant Application

Thank you for applying to the S. L. Gimbel Foundation Fund Grant. The mission of the S.L. Gimbel Foundation is to enhance the quality of life for people and animals by providing effective support in the Founder's specific fields of interest: Animal Protection, Education, Environmental Protection and Enhancement, Health, and Human Dignity. Please take a moment to review the grant application guidelines before continuing the process (use "Guidelines" link above). After you have read and understood the guidelines, please proceed with the grant application process. Should you have any questions regarding the online grant application process, please check the "Portal Guide" link above. If your questions are not answered via the Portal Guide, contact us using the "Contact Us" link above.

Organization Information

NOTE: If you have already started an online application and would like to resume, please [CLICK HERE](#) to login to your Applicant Account Page.

Organization/Agency Information
Organization/Agency Name (If operating as a DBA, enter DBA name here) Laguna Canyon Foundation
Legal Name If different from DBA/Organization/Agency Name
Tax ID 33-0441816
Tax Status

501(c)3

Organization Mailing Address

Street Address or P.O. Box (No residential addresses, please)

PO Box 4895

City

Laguna Beach

State

CA

Zip Code

92652

Organization Physical Address

Street No. and Name, City, State, Zip (No residential addresses, please)

384 Legion St.

Laguna Beach, CA 92651

Website Address

<https://lagunacanyon.org/>

Organizational Leadership (Please list CEO, President, Board Chair, Executive Director)

Prefix

Ms

First Name

Hallie

Last Name

Jones

Title

Executive Director

Work Phone

(xxx-xxx-xxxx)

949-497-8324

Extension

Cell Phone

(xxx-xxx-xxxx)

Fax

(xxx-xxx-xxxx)

E-mail Address

hallie@lagunacanyon.org

Program/Project Contact Person

Check this box if the Program/Project Contact Person is the same as the organization's primary contact listed above

Fields in this section will auto-fill.

No

Prefix

Mr.

First Name

Alan

Last Name

Kaufmann

Title

Restoration Program Director

Work Phone

(xxx-xxx-xxxx)

949-497-8324

Extension**Office Fax****E-mail Address**

alan@lagunacanyon.org

Organization/Agency Background**Organization Background**

What is the history, mission, and purpose of your organization?

Laguna Canyon Foundation is dedicated to preserving, protecting, enhancing and promoting the South Coast Wilderness – a network of open space that includes Laguna Coast Wilderness Park & Aliso and Wood Canyons Wilderness Park in Orange County, California.

Following the historic events of the November 1989 March to Save Laguna Canyon and the passage of the twenty million dollar bond measure by Laguna Beach voters in November 1990, Laguna Canyon Foundation was formed to help with the preservation of Laguna Canyon. Together with the City of Laguna Beach, County of Orange, and the State of California, Laguna Canyon Foundation purchased sections of the canyon slated for development, and established Laguna Coast Wilderness Park in 1993. The partnership continues with the nationally recognized James and Rosemary Nix Nature Center and interpretive exhibits, and the more than 200 Laguna Canyon Foundation volunteers who help OC Parks manage these unique coastal canyons.

Length of Service (number of years)

How long has the organization been providing programs and services to the community?

27

Organizational Accomplishments

What are some of your past organizational accomplishments in the last 3 years?

- From FY 2014-15 to 2015-16, we more than doubled the number of our volunteer trail events, and more than quadrupled the number of unique volunteers participating. In FY 2016-17, our staff and volunteers completed over 1000 hours of trailwork on 15 different trails. Among other accomplishments, we improved or maintained 1600 linear feet of tread and cleared 21,500 linear feet (over four miles) of brush off our trails.
- After years of working with eleven Title 1 partner schools, we expanded our education program to twelve schools in 2017-18. In 2017, we also promoted one of our long-time field educators to a full-time Outreach and Restoration Coordinator position, working half-time to support the education program, and hired three experienced new field educators. We are on track to bring approximately 5,000 elementary school students into the parks this school year, with 80 field trips completed or scheduled.
- In 2017, in addition to our trail and restoration volunteer events, our 115 long-term volunteers led 159 hikes, bike rides, and other events, with over 1300 members of the public attending. Overall, our volunteers (short and long-term served 6,319 hours in 2017. The Foundation held numerous volunteer mixers, hikes, and appreciation events to thank our volunteers and strengthen bonds between volunteers, board, and staff.
- Our Restoration Program was awarded a grant of nearly \$700,000 to fund habitat restoration at Pecten Reef in Aliso and Wood Canyons Wilderness Park, the latest of over a dozen ongoing restoration projects throughout the parks and the City of Laguna Beach. Our new Restoration Stewardship volunteer opportunities help participants connect with nature through hands-on habitat restoration activities. Volunteers are a part of the entire habitat restoration process, from planting seeds in the nursery, to planting the seedlings in the ground, to caring for the growing plants.

Programs and Activities

What are some of your current key programs and activities? Describe the communities you serve. Include populations and geographic locations.

Laguna Canyon Foundation preserves, protects, enhances and promotes the South Coast Wilderness through restoration, education, trail work, and public outreach.

- Our Restoration Program, established in 2011, has completed work on over 100 acres of habitat within the South Coast Wilderness and its surrounding areas. Our work includes invasive species removal and management, seeding and planting of native vegetation, irrigation, monitoring, and transformation of illegal trails back into native habitat.
- The South Coast Wilderness Education Program offers free standards-based nature programs to under-served schools. Each year, thousands of students from our partner Title 1 schools throughout Orange County enjoy field trips into the wilderness parks. For many students, this is their only opportunity to experience the open space, and their only field trip of the year.
- Our Trails Program works with OC Parks on over 70 miles of trails throughout the Wilderness Parks. Our work includes maintenance, restoration, realignment, and construction of new trails. LCF and OC Parks staff work together to minimize human impacts, protect habitat, and foster community investment in the trails and harmony between different trail user groups.
- Our Volunteer Program coordinates approximately 115 long-term trained, CPR-certified volunteers. Hundreds more short-term volunteers attend our trailwork and restoration volunteer days each year, and collectively our volunteers accomplish over 6,000 hours of volunteer work in the parks every year. In addition to assisting with habitat restoration and trail maintenance, our volunteers staff park entrances and offer more than 30 public nature education programs each month through hikes, outdoor workshops and other programs.

Program/Project Information**Program / Project Information****Interest Area**

Environmental

Program or Project Name

Laguna Ridge Trail Restoration Phase 2

Amount of Grant Requested

Use whole dollars, do not use \$ sign, comma, or decimal

25000

Total Organization Annual Operating Budget

Use whole dollars, do not use \$ sign, comma, or decimal

1410276

Per 990, Percentage of Program Service Expenses

Column B divided by Column A, x 100 (Please enter no more than 2 digits, i.e., 7.9)

82

Per 990, Percentage of Management & General Expenses Only

Column C divided by Column A, x 100 (Please enter no more than 2 digits, i.e., 7.9)

16

Per 990, Percentage of Management & General Expenses and Fundraising

Column C + Column D, divided by Column A, x 100 (Please enter no more than 2 digits, i.e., 7.9)

18

Purpose of Grant Request

Please summarize the project (in 25 words or less).

Restore the middle section of Laguna Ridge Trail

Use of Grant Funds

How will you use the grant funds?

Grant funds will be used to employ a local conservation corps crew for one week and to purchase necessary materials and supplies including natural rock, erosion control materials and native seed. It will also cover program staff time for planning, coordination, procurement of materials and supplies, organizing and conducting volunteer events, and supervising conservation corps work.

Project Start Date

Month and Year

8/01/2018

Project End Date

Month and Year

7/31/2019

Gimbel Grants Received

List previous years with award amounts, if applicable

2016 - \$23,553.00

2013 - \$25,000.00

2011 - \$25,000.00

2009 - \$10,000.00

Statement of Need

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

Laguna Canyon Foundation (LCF) has been working for the past four years with Orange County Parks (OC Parks) to improve and maintain the trails in Orange County's Laguna Coast and Aliso & Wood Canyon Wilderness Parks. The trail systems in these parks are a hodgepodge of old ranch roads, semi-improved cattle trails, and ad hoc trails made by users. Partially due to a dramatic increase in the number of users in the last several years, many of these trails--especially the steep single-track trails linking the ridge tops to the canyon bottoms--have experienced heavy erosion damage and widening, impacting both the surrounding sensitive coastal sage scrub habitat and the safety

and experience of the trail users. Laguna Ridge Trail is a prime example of such a trail.

Last year, with the help of a generous grant from the Gimbel Foundation, we completed a major project on the uppermost segment of this trail, including completion of a 0.3-mile re-route and the re-establishment of 0.4 acres of native vegetation on the badly-eroded original trail alignment and the dozer scar left from fire suppression activities.

The rest of this trail suffers from similar problems and would benefit greatly from a continuation of the work we have already completed. The middle 1,000-foot segment includes additional very steep portions of trail that are continuing to actively erode and widen, causing damage to adjacent sensitive coastal sage scrub vegetation. One pitch is so steep and rocky that most hikers need to use their hands to negotiate it and few mountain bikers can ride it.

Project Description

Describe your project. How will this project enable this organization to better meet community needs? What is unique and innovative about this project?

We will improve this 1,000-foot segment of trail through potential realignments as approved by park staff and a combination of earthen drainage structures, in-sloped turns, and tread armoring. Natural rock will be used for tread armoring.

We will install erosion control devices (wattles and check dams) and re-vegetate barren areas by sowing the seed of native plant species. This seed will be sourced from within 50 miles of the restoration site, in compliance with OC Parks policy. Due to the relative inaccessibility of this portion of the trail, irrigation will not be feasible and we will therefore rely on natural precipitation of these seeds to become established plants.

We will complete this work through a combination of 12 volunteer events and a partnership with the Orange County Conservation Corps to haul building materials to the work site, install erosion control measures, de-compact areas to be seeded, and naturalize along the sides of the completed tread.

These changes will improve the experience of the many hikers and mountain bikers who use this trail, mitigate the impacts of this trail on the surrounding habitat, and dramatically reduce the time and energy required to maintain this trail in the future. Most importantly, it will help us to engage trail users and the community at large in caring for our parks, creating advocates who can help us to spread the word about the importance of our wild spaces, and help us to protect them for future generations.

Due to the conditions and constraints that exist in our area (e.g., sensitive habitats, fragile soils, lack of natural on-site building materials, etc.), the LCF Trail Program has had to develop innovative techniques to be able to conduct our work. These include the use of burlap bags to collect loose, eroded dirt from the trails which is then used to create rammed-earth trail structures, and the use of a truck-mounted tank, pump and hose-lay to deliver water to trail construction sites, allowing tread repair work to be accomplished outside of the normal rainy season.

Project Goal, Objectives, Activities, Expected Outcomes, and Evaluation: In fields below, state in the following order: **1. ONE Project Goal** that is a broad, aspirational statement of purpose for the project and **ONE Objective** that is a specific, measurable, verifiable, action-oriented, realistic, and time-specific statement intended to guide your organization's activities toward achieving the goal. **2. Specify the Project Activities** you will undertake to meet the objective and number of participants for each activity. **3. 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? State in quantifiable and verifiable terms. **4. Evaluation** How will progress towards the objectives be tracked and outcomes measured? Provide specific information on how you will collect relevant data and statistics that meet your objective and validate your expected outcomes in a quantifiable manner as you describe your evaluation process.

1. Project Goal

Restore the middle 1,000-foot section of Laguna Ridge Trail.

2. Project Objective

Improve tread condition, user experience & safety and sustainability of 1,000 feet of the Laguna Ridge Trail and restore adjacent habitat **through constructing 10 drainage features, 100 square feet of retaining walls, creating 80 feet of new tread, rock-armoring 150 square feet of tread, installing 500 feet of straw wattles and 10 check dams, and decompacting & seeding approximately 600 square feet with native**

plants.

3. Project Activities

Plan, organize and conduct twelve volunteer trail work events averaging at least 5 volunteers each event.

Coordinate and Supervise 1 week of work by a local conservation corps crew (6 to 8 youth)

Construct **10** earthen drainage features.

Construct 80 feet of new trail tread.

Construct 100 square feet of rammed-earth retaining wall.

Reconstruct and armor **150 square feet of tread surface** with imported natural rock.

Install erosion control devices (**approximately 500 linear feet of straw wattles and 5 check dams**).

Decompact and sow native seed **over approximately 600 feet of impacted area.**

4. Expected Outcomes

We will improve drainage and tread condition, and restore native habitat along 1,000 feet of Laguna Ridge Trail, leading to improved user experience, improved user safety and improved trail sustainability **through constructing 10 drainage features, 100 square feet of retaining walls, creating 80 feet of new tread, rock-armoring 150 square feet of tread, installing 500 feet of straw wattles and 10 check dams, and decompacting & seeding approximately 600 square feet with native plants.**

5. Evaluation

We will take representative photographs from established photo points along the 1,000 feet of restored trail before and after the project to show changes in tread condition, changes made to the trail to improve user experience and safety, and changes made to improve sustainability. **When the project is complete, we will track our progress towards constructing 10 drainage features, 100 square feet of retaining walls, creating 80 feet of new tread, rock-armoring 150 square feet of tread, installing 500 feet of straw wattles and 10 check dams, and decompacting & seeding approximately 600 square feet with native plants, and account for any discrepancies (lower or higher) in these numbers.**

***Below are some examples of how to list your Goals, Objectives, Activities, Expected Outcomes, and Evaluation: Objective, Outcome, and Evaluation should align and should be written in a linear format, using actual numbers and data that are quantifiable and verifiable.**

STATE ONE GOAL, ONE OBJECTIVE, ONE OUTCOME:

- **GOAL:** House all homeless youth ages 18-24 in Mariposa County who are physically, mentally, and legally able to work within 24 hours and help them become self-sufficient in 90 days.
- **OBJECTIVE:** House up to 145 homeless youth referred or who contact us within 24 hours.
- **OUTCOME:** We expect to provide rapid rehousing to over 45 homeless youth in 2017. **EVALUATION:** Using Build Futures' Salesforce database client management and tracking system, generate reports on the number of clients served and housed. Track our role in housing 145 youth. Account for additional success or lower numbers of youth in the program.

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 all of the future users of this trail. While no data exists on how many hikers and bikers use the popular Laguna Ridge Trail itself, over 500,000 people visited Laguna Coast Wilderness Park in 2016.

This grant will also serve the people who attend the volunteer trail work events through educating them on the principles of trail construction and maintenance, and giving them a deeper appreciation for the trails and habitats of their Parks. Our goal is to engage at least 30 unique volunteers (including at least 6 youth) through these events.

We will also engage a crew (6 to 8 young adults) from the Orange County Conservation Corps (OCCC) for two weeks of work. The OCCC is a voluntary work-and-learn program that provides an opportunity for at-risk and disadvantaged youth, age 18 to 25. This program grants the Corpsmembers a chance to earn a living while learning valuable employment skills through job training, while attending an on-site charter school to earn their high school diploma.

Project Timeline

Provide a timeline for implementing the project. Include timeframes for specific activities, as appropriate.

8/01/18-10/2/18: Planning & coordination, set up photo monitoring points.

10/3/18-6/13/19: Plan, organize and conduct 12 volunteer trail work events (construct drainage features, re-

construct and armor tread).

12/01/18-1/31/19: Employ and supervise an OCCC crew for 2 weeks of work (import materials, install erosion control, decompact soil in revegetation areas).

2/01/19-3/15/19: Sow seed in revegetation areas.

7/01/19-7/31/19: Take post-work photos and complete reporting requirements.

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?

Laguna Canyon Foundation is the only organization authorized to perform trail construction and maintenance in the local Wilderness Parks. We have collaborated with OC Parks staff over the past four years to develop and begin to implement a comprehensive vision for the future of the South Coast Wilderness and its trail systems. We also work with local mountain bike clubs (including SHARE, ThinkMTB and Laguna Canyon Riders) to promote our volunteer events and fund our bike bell program.

The LCF Trail Program plans, organizes and conducts over 50 volunteer events per year and contributes 1,000 to 1,500 hours of combined volunteer and staff time each year to the improvement and maintenance of our trail systems.

Project Future

Project Future / Sustainability

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

The project will be largely completed after the grant performance period. Completing the work now will reduce ongoing maintenance costs in the future. Future maintenance will be funded by individual major donors to our trail program.

Governance, Executive Leadership, and Management: Key Personnel / Staff Qualifications

Governance and Executive Leadership

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

The board of directors meets bimonthly, with committees meeting monthly. Committees include the executive committee, finance committee, fundraising committee, investment committee, and trails program committee. Committees develop action plans and move projects forward, and present reports, recommendations and proposals to the full board. All board decisions are made by in-person or phone votes. The board's responsibilities include overseeing the financial health of the organization, providing meaningful financial support, ensuring the strategic and annual plan support the mission of the Foundation, and supervision of the Executive Director.

Management

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

Laguna Canyon Foundation staff work closely with OC Parks staff to maintain and improve our trails in Laguna Coast Wilderness Park and Aliso and Wood Canyons Wilderness Parks. LCF trail maintenance staff are knowledgeable and experienced. Our Restoration Director has a Master of Science degree in Restoration Ecology and eight years of experience in ecological restoration and trailwork, while our trail consultant is a professional trail builder and local expert with 30 years of experience using and promoting Laguna Canyon's trails and fostering collaboration between land managers, conservationists and the mountain biking community. In 2015, LCF and OC Parks staff jointly attended California State Parks' five-day "Basic Trails Program: Management and Maintenance" training. This training is the gold standard of trail building education offered in the State, and is highly regarded by land managers throughout the region. Both our Restoration Manager and Trail Consultant attended the first phase of this training, and our Trail Consultant attended the second phase.

Attachments

ATTACHMENTS

REQUIRED .PDF ATTACHMENTS: The maximum size for all attachments combined is 25 MB. Please note that files

with certain extensions such as ".exe", ".com", ".vbs", or ".bat" cannot be uploaded. You must **1. BROWSE FILES** on your computer, **2. SELECT FILES**, then **3. CLICK UPLOAD** to attach files. ***IMPORTANT: For each set of required documents below**, please scan all pages of each set into one .pdf, as only a single document upload is permitted for each item being requested. **Only upload in .PDF format (DO NOT** upload Word or Excel documents, formatting gets lost when exported). Review each of your attachments to make sure there are no duplicate documents being uploaded before you submit your final application. **Failure to use the provided forms or missing required documents may disqualify your application.**

1. Project Budget and Budget Narrative

Please provide a detailed line-item budget for your **entire** project. Download the **V. Project Budget and Narrative Worksheet**, complete, and **Upload**. SEE **SAMPLE Budget & Narratives Worksheet**,

2. Sources of Funding

Please list your current sources of funding and amounts. Download the **VI. Sources of Funding Worksheet**, complete, and **Upload**.

3. Financial Analysis

Please provide all information requested for your **entire organization**. Included any notes that may explain any extraordinary circumstances. Download the **VII. Financial Analysis Worksheet**, complete, and **Upload**.

4. Current Year Operating Budget

Please provide a copy of your current year's operating budget

5. Budget Comparison

Download the **SAMPLE Budget Comparison Worksheet**, complete, and **Upload**.

6. Part IX only of the 990 form

Statement of Functional Expenses (one page). If you completed a 990-EZ, Download the **Part IX Functional Expenses sample** of the 990 form using figures from your 990 EZ, complete, and **Upload**.

7. Financial Statements

Please provide a copy of your most recent year-end financial statements (audited, if possible)

8. Most Recent 990

Please provide a copy of your most recent 990 form

9. Tax Exemption Letter

Please provide an electronic copy of your IRS 501 (c) (3) determination letter.

10. Board of Directors List

Please provide a list of your current Board of Directors, including their name, position on the board, and professional affiliation(s).

11. Evaluation & Expenditure Report

For past grantees, provide a copy of your most recent final evaluation report, including your most recent expenditure report.

2018 S.L. Gimbel Foundation APPLICATION

Organization Name:

Laguna Canyon Foundation

V. Project Budget and Narrative (Do not delete these instructions on your completed form).

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.
4. Line Item Description should be **no more than two lines**; otherwise, it will get cut off. Additional descriptions should be included in the Budget Narrative.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Executive Director	12 hours at \$101.04/hour			\$1,212.40	\$1,212.48
Restoration Program Director	80 hours at \$53.53/hour			\$4,282.40	\$4,282.40
Restoration Technician	120 hours at \$28.61/hour			\$3,433.20	\$3,433.20
Trail Consultant	120 hours at \$40.00/hour			\$4,800.00	\$4,800.00
Trail Stewardship Volunteers	Valued at \$28.46/hour	\$6,147.36		\$ -	\$6,147.36
Conservation Corps Crew	2 weeks at \$4205/week		\$4,205.00	\$4,205.00	\$8,410.00
Interpretive signage	2 Interpretive signs, \$1000/each		\$1,000.00	\$1,000.00	\$2,000.00
Erosion Control and Plant Materials	Native seeds and materials			\$1,970.00	\$1,970.00
Trail Materials and Supplies	Rock, tools, gloves			\$1,697.00	\$1,697.00

Vehicle Day Rate	Full-size Pickup at \$80.00/day			\$2,400.00	\$2,400.00
TOTALS:		\$6,147.36	\$5,205.00	\$25,000.00	\$36,352.44

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

Executive Director Salary: This rate of \$101.04 per hour is the full burdened and overhead rate for the Executive Director. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes, medical and retirement benefits) as well as a proportion of overhead. The Executive Director will spend minimal time on this project in planning and management.

Restoration Program Director Salary: This rate of \$53.53 per hour is the full burdened and overhead rate for the Restoration Program Director. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes, medical and retirement benefits) as well as a proportion of overhead. The Restoration Program Director will spend significant time on this project in planning, management, and supervision of restoration technicians, volunteers, and consultants.

Restoration Technician Salary: This rate of \$28.61 per hour is the full burdened and overhead rate for the Restoration Technician. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes, medical and retirement benefits) as well as a proportion of overhead. The Restoration Technicians will spend significant time on this project in on-the-ground fieldwork.

Trail Consultant: This rate of \$40/hour is the flat wage paid to the trail consultant. The Trail Consultant will spend significant time on this project in on-the-ground fieldwork.

Trail Stewardship Volunteers: Volunteer time is valued at \$28.46/hour as calculated for California by Independent Sector: <https://independentsector.org/resource/the-value-of-volunteer-time/> . We will hold twelve separate three-hour volunteer events, and expect an average of six volunteers per event (12 x 3 x 6 x \$28.46 = \$6,147.36).

Conservation Corps Crew: The Orange County Conservation Corps, who we work with frequently, charges \$4,205/week for a crew of 6-8 Corpsmembers. We will hire them for one week of work and they will donate an additional week of work to this project.

Interpretive Signage: We have our trail signs designed and fabricated by Troy Lee Designs. The signs cost \$1,000 each. Troy Lee has agreed to donate one of these signs.

Erosion Control and Plant Materials: Includes 500 linear feet of wattles at \$1.50/feet, 100 2-foot wooden stakes at \$0.50 each, 10 check dams at \$75 each, and 7 pounds seed at \$60/pound.

Trail Materials and Supplies: Includes three tons of natural rock for tread armoring at \$500/ton, three hand tools at \$39/tool, and ten pairs of leather gloves for volunteer use at \$8/pair.

Vehicle Day Rate: Includes 30 days of vehicle use at \$80/day.

From: Sydney Jones

Sent: Wednesday, May 30, 2018 4:10 PM

To: ccudiamat@thecommunityfoundation.net

Subject: FW: Gimbel Foundation Grant Application

2018 S.L. Gimbel Foundation APPLICATION

Organization Name:

Laguna Canyon Foundation

V. Project Budget and Narrative (Do not delete these instructions on your completed form).

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.
- 4) Line Item Description should be **no more than two lines**; otherwise, it will get cut off. Additional descriptions should be included in the Budget Narrative.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Executive Director	12 hours at \$101.04/hour			\$1,212.40	\$1,212.48
Restoration Program Director	80 hours at \$53.53/hour			\$4,282.40	\$4,282.40
Restoration Technician	120 hours at \$28.61/hour			\$3,433.20	\$3,433.20
Trail Consultant	120 hours at \$40.00/hour			\$4,800.00	\$4,800.00
Trail Stewardship Volunteers	Valued at \$28.46/hour	\$6,147.36		\$ -	\$6,147.36
Conservation Corps Crew	2 weeks at \$4205/week		\$4,205.00	\$4,205.00	\$8,410.00
Interpretive signage	2 Interpretive signs, \$1000/each		\$1,000.00	\$1,000.00	\$2,000.00
Erosion Control and Plant Materials	Native seeds and materials			\$1,970.00	\$1,970.00
Trail Materials and Supplies	Rock, tools, gloves			\$1,697.00	\$1,697.00
Vehicle Day Rate	Full-size Pickup at \$80.00/day			\$2,400.00	\$2,400.00
TOTALS:		\$6,147.36	\$5,205.00	\$25,000.00	\$36,352.44

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

Executive Director Salary: This rate of \$101.04 per hour is the full burdened and overhead rate for the Executive Director. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes, medical and retirement benefits) as well as a proportion of overhead. The Executive Director will spend minimal time on this project in planning and management.

Restoration Program Director Salary: This rate of \$53.53 per hour is the full burdened and overhead rate for the Restoration Program Director. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes, medical and retirement benefits) as well as a proportion of overhead. The Restoration Program Director will spend significant time on this project in planning, management, and supervision of restoration technicians, volunteers, and consultants.

Restoration Technician Salary: This rate of \$28.61 per hour is the full burdened and overhead rate for the Restoration Technician. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes, medical and retirement benefits) as well as a proportion of overhead. The Restoration Technicians will spend significant time on this project in on-the-ground fieldwork.

Trail Consultant: This rate of \$40/hour is the flat wage paid to the trail consultant. The Trail Consultant will spend significant time on this project in on-the-ground fieldwork.

Trail Stewardship Volunteers: Volunteer time is valued at \$28.46/hour as calculated for California by Independent Sector: <https://independentsector.org/resource/the-value-of-volunteer-time/> . We will hold twelve separate three-hour volunteer events, and expect an average of six volunteers per event ($12 \times 3 \times 6 \times \$28.46 = \$6,147.36$).

Conservation Corps Crew: The Orange County Conservation Corps, who we work with frequently, charges \$4,205/week for a crew of 6-8 Corpsmembers. We will hire them for one week of work and they will donate an additional week of work to this project.

Interpretive Signage: We have our trail signs designed and fabricated by Troy Lee Designs. The signs cost \$1,000 each. Troy Lee has agreed to donate one of these signs.

Erosion Control and Plant Materials: Includes 500 linear feet of wattles at \$1.50/feet, 100 2-foot wooden stakes at \$ 0.50 each, 10 check dams at \$75 each, and 7 pounds seed at \$60/pound.

Trail Materials and Supplies: Includes three tons of natural rock for tread armoring at \$500/ton, three hand tools at \$39/tool, and ten pairs of leather gloves for volunteer use at \$8/pair.

Vehicle Day Rate: Includes 30 days of vehicle use at \$80/day.

2018 S.L. Gimbel Foundation Fund APPLICATION

Narrative

I. Organization Background

Laguna Canyon Foundation is dedicated to preserving, protecting, enhancing and promoting the South Coast Wilderness – a network of open space that includes Laguna Coast Wilderness Park & Aliso and Wood Canyons Wilderness Park in Orange County, California.

Following the historic events of the November 1989 March to Save Laguna Canyon and the passage of the twenty million dollar bond measure by Laguna Beach voters in November 1990, Laguna Canyon Foundation was formed to help with the preservation of Laguna Canyon. Together with the City of Laguna Beach, County of Orange, and the State of California, Laguna Canyon Foundation purchased sections of the canyon slated for development, and established Laguna Coast Wilderness Park in 1993. The partnership continues with the nationally recognized James and Rosemary Nix Nature Center and interpretive exhibits, and the more than 200 Laguna Canyon Foundation volunteers who help OC Parks manage these unique coastal canyons.

Organizational Accomplishments:

- From FY 2014-15 to 2015-16, we more than doubled the number of our volunteer trail events, and more than quadrupled the number of unique volunteers participating. In FY 2016-17, our staff and volunteers completed over 1000 hours of trailwork on 15 different trails. Among other accomplishments, we improved or maintained 1600 linear feet of tread and cleared 21,500 linear feet (over four miles) of brush off our trails.
- After years of working with eleven Title 1 partner schools, we expanded our education program to twelve schools in 2017-18. In 2017, we also promoted one of our long-time field educators to a full-time Outreach and Restoration Coordinator position, working half-time to support the education program, and hired three experienced new field educators. We are on track to bring approximately 5,000 elementary school students into the parks this school year, with 80 field trips completed or scheduled.
- In 2017, in addition to our trail and restoration volunteer events, our 115 long-term volunteers led 159 hikes, bike rides, and other events, with over 1300 members of the public attending. Overall, our volunteers (short and long-term served 6,319 hours in 2017. The Foundation held numerous volunteer mixers, hikes, and appreciation events to thank our volunteers and strengthen bonds between volunteers, board, and staff.
- Our Restoration Program was awarded a grant of nearly \$700,000 to fund habitat restoration at Pecten Reef in Aliso and Wood Canyons Wilderness Park, the latest of over a dozen ongoing restoration projects throughout the parks and the City of Laguna Beach. Our new Restoration Stewardship volunteer opportunities help participants connect with nature through hands-on habitat restoration activities. Volunteers are a part of the entire habitat restoration process, from planting seeds in the nursery, to planting the seedlings in the ground, to caring for the growing plants.

Program Activities:

Laguna Canyon Foundation preserves, protects, enhances and promotes the South Coast Wilderness through restoration, education, trail work, and public outreach.

- Our Restoration Program, established in 2011, has completed work on over 100 acres of habitat within the South Coast Wilderness and its surrounding areas. Our work includes invasive species removal and management, seeding and planting of native vegetation, irrigation, monitoring, and transformation of illegal trails back into native habitat.
- The South Coast Wilderness Education Program offers free standards-based nature programs to under-served schools. Each year, thousands of students from our partner Title 1 schools throughout Orange County enjoy field trips into the wilderness parks. For many students, this is their only opportunity to experience the open space, and their only field trip of the year.
- Our Trails Program works with OC Parks on over 70 miles of trails throughout the Wilderness Parks. Our work includes maintenance, restoration, realignment, and construction of new trails. LCF and OC Parks staff work together to minimize human impacts, protect habitat, and foster community investment in the trails and harmony between different trail user groups.
- Our Volunteer Program coordinates approximately 115 long-term trained, CPR-certified volunteers. Hundreds more short-term volunteers attend our trailwork and restoration volunteer days each year, and

collectively our volunteers accomplish over 6,000 hours of volunteer work in the parks every year. In addition to assisting with habitat restoration and trail maintenance, our volunteers staff park entrances and offer more than 30 public nature education programs each month through hikes, outdoor workshops and other programs.

II. Project Information:

A) Statement of Need

Laguna Canyon Foundation (LCF) has been working for the past four years with Orange County Parks (OC Parks) to improve and maintain the trails in Orange County's Laguna Coast and Aliso & Wood Canyon Wilderness Parks. The trail systems in these parks are a hodgepodge of old ranch roads, semi-improved cattle trails, and ad hoc trails made by users. Partially due to a dramatic increase in the number of users in the last several years, many of these trails--especially the steep single-track trails linking the ridge tops to the canyon bottoms--have experienced heavy erosion damage and widening, impacting both the surrounding sensitive coastal sage scrub habitat and the safety and experience of the trail users. Laguna Ridge Trail is a prime example of such a trail.

Last year, with the help of a generous grant from the Gimbel Foundation, we completed a major project on the uppermost segment of this trail, including completion of a 0.3-mile re-route and the re-establishment of 0.4 acres of native vegetation on the badly-eroded original trail alignment and the dozer scar left from fire suppression activities.

The rest of this trail suffers from similar problems and would benefit greatly from a continuation of the work we have already completed. The middle 1,000-foot segment includes additional very steep portions of trail that are continuing to actively erode and widen, causing damage to adjacent sensitive coastal sage scrub vegetation. One pitch is so steep and rocky that most hikers need to use their hands to negotiate it and few mountain bikers can ride it.

B) Project Description

We will improve this 1,000-foot segment of trail through potential realignments as approved by park staff and a combination of earthen drainage structures, in-sloped turns, and tread armoring. Natural rock will be used for tread armoring.

We will install erosion control devices (wattles and check dams) and re-vegetate barren areas by sowing the seed of native plant species. This seed will be sourced from within 50 miles of the restoration site, in compliance with OC Parks policy. Due to the relative inaccessibility of this portion of the trail, irrigation will not be feasible and we will therefore rely on natural precipitation of these seeds to become established plants.

We will complete this work through a combination of 12 volunteer events and a partnership with the Orange County Conservation Corps to haul building materials to the work site, install erosion control measures, de-compact areas to be seeded, and naturalize along the sides of the completed tread. These changes will improve the experience of the many hikers and mountain bikers who use this trail, mitigate the impacts of this trail on the surrounding habitat, and dramatically reduce the time and energy required to maintain this trail in the future. Most importantly, it will help us to engage trail users and the community at large in caring for our parks, creating advocates who can help us to spread the word about the importance of our wild spaces, and help us to protect them for future generations.

Due to the conditions and constraints that exist in our area (e.g., sensitive habitats, fragile soils, lack of natural on-site building materials, etc.), the LCF Trail Program has had to develop innovative techniques to be able to conduct our work. These include the use of burlap bags to collect loose, eroded dirt from the trails which is then used to create rammed-earth trail structures, and the use of a truck-mounted tank, pump and hose-lay to deliver water to trail construction sites, allowing tread repair work to be accomplished outside of the normal rainy season.

C) Project Goal, Objectives, Activities, Expected Outcomes & Evaluation

Project Goal: Restore the middle 1,000-foot section of Laguna Ridge Trail.

Project Objectives: Improve tread condition, user experience & safety and sustainability of 1,000 feet of the Laguna Ridge Trail and restore adjacent habitat.

Project Activities: Plan, organize and conduct twelve volunteer trail work events averaging at least 5 volunteers each event.

Coordinate and Supervise 1 week of work by a local conservation corps crew (6 to 8 youth)

Construct earthen drainage features.

Reconstruct and armor tread surface with imported natural rock.

Install erosion control devices (wattles and check dams).

Decompact revegetation areas and sow native seed.

Expected Outcomes: We will improve drainage and tread condition, and restore native habitat along 1,000 feet of Laguna Ridge Trail, leading to improved user experience, improved user safety and improved trail sustainability.

Evaluation:

We will take representative photographs from established photo points along the 1,000 feet of restored trail before and after the project to show changes in tread condition, changes made to the trail to improve user experience and safety, and changes made to improve sustainability. We will track statistics on our volunteer events including unique volunteers engaged, total hours of work, and the number and types of structures built.

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.

6/17/18-9/31/18: Planning & coordination, set up photo monitoring points.

10/3/18-6/13/19: Plan, organize and conduct 12 volunteer trail work events (construct drainage features, re-construct and armor tread).

12/01/18-1/31/19: Employ and supervise an OCCC crew for 2 weeks of work (import materials, install erosion control, decompact soil in revegetation areas.

2/01/19-3/15/19: Sow seed in revegetation areas.

5/15/18-6/15/18: Take post-work photos and complete reporting requirements.

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 the users of this trail. While no data exists on how many hikers and bikers use the popular Laguna Ridge Trail itself, over 500,000 people visited Laguna Coast Wilderness Park in 2016. This grant will also serve the people who attend the volunteer trail work events through educating them on the principles of trail construction and maintenance, and giving them a deeper appreciation for the trails and habitats of their Parks. Our goal is to engage at least 30 unique volunteers (including at least 6 youth) through these events.

We will also engage a crew (6 to 8 young adults) from the Orange County Conservation Corps (OCCC) for two weeks of work. The OCCC is a voluntary work-and-learn program that provides an opportunity for at-risk and disadvantaged youth, age 18 to 25. This program grants the Corpsmembers a chance to earn a living while learning valuable employment skills through job training, while attending an on-site charter school to earn their high school diploma.

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?

Laguna Canyon Foundation is the only organization authorized to perform trail construction and maintenance in the local Wilderness Parks. We have collaborated with OC Parks staff over the past four years to develop and begin to implement a comprehensive vision for the future of the South Coast Wilderness and its trail systems. We also work with local mountain bike clubs (including SHARE, ThinkMTB and Laguna Canyon Riders) to promote our volunteer events and fund our bike bell program. The LCF Trail Program plans, organizes and conducts over 50 volunteer events per year and contributes 1,000 to 1,500 hours of combined volunteer and staff time each year to the improvement and maintenance of our trail systems.

G) Use of Grant Funds

How will you use the grant funds?

Grant funds will be used to employ a local conservation corps crew for one week and to purchase necessary materials and supplies including natural rock, erosion control materials and native seed. It will also cover program staff time for planning, coordination, procurement of materials and supplies, organizing and conducting volunteer events, and supervising conservation corps work.

III. Project Future

A) Sustainability

The project will be largely completed after the grant performance period. Completing the work now will reduce ongoing maintenance costs in the future. Future maintenance will be funded by individual major donors to our trail program.

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

A) Governance

The board of directors meets bimonthly, with committees meeting monthly. Committees include the executive committee, finance committee, fundraising committee, investment committee, and trails program committee. Committees develop action plans and move projects forward, and present reports, recommendations and proposals to the full board. All board decisions are made by in-person or phone votes. The board's responsibilities include overseeing the financial health of the organization, providing meaningful financial support, ensuring the strategic and annual plan support the mission of the Foundation, and supervision of the Executive Director.

B) Management

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

Laguna Canyon Foundation staff work closely with OC Parks staff to maintain and improve our trails in Laguna Coast Wilderness Park and Aliso and Wood Canyons Wilderness Parks. LCF trail maintenance staff are knowledgeable and experienced. Our Restoration Director has a Master of Science degree in Restoration Ecology and eight years of experience in ecological restoration and trailwork, while our trail consultant is a professional trail builder and local expert with 30 years of experience using and promoting Laguna Canyon's trails and fostering collaboration between land managers, conservationists and the mountain biking community. In 2015, LCF and OC Parks staff jointly attended California State Parks' five-day "Basic Trails Program: Management and Maintenance" training. This training is the gold standard of trail building education offered in the State, and is highly regarded by land managers throughout the region. Both our Restoration Manager and Trail Consultant attended the first phase of this training, and our Trail Consultant attended the second phase.

2018 S.L. Gimbel Foundation APPLICATION

Organization Name:

Laguna Canyon Foundation

V. Project Budget and Narrative (Do not delete these instructions on your completed form).

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.
- 4) Line Item Description should be **no more than two lines**; otherwise, it will get cut off. Additional descriptions should be included in the Budget Narrative.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Executive Director	12 hours at \$101.04/hour			\$1,212.40	\$1,212.48
Restoration Program Director	80 hours at \$53.53/hour			\$4,282.40	\$4,282.40
Restoration Technician	120 hours at \$28.61/hour			\$3,433.20	\$3,433.20
Trail Consultant	120 hours at \$40.00/hour			\$4,800.00	\$4,800.00
Trail Stewardship Volunteers	Valued at \$28.46/hour	\$6,147.36		\$ -	\$6,147.36
Conservation Corps Crew	2 weeks at \$4205/week		\$4,205.00	\$4,205.00	\$8,410.00
Interpretive signage	2 Interpretive signs, \$1000/each		\$1,000.00	\$1,000.00	\$2,000.00
Erosion Control and Plant Materials	Native seeds and materials			\$1,970.00	\$1,970.00
Trail Materials and Supplies	Rock, tools, gloves			\$1,697.00	\$1,697.00
Vehicle Day Rate	Full-size Pickup at \$80.00/day			\$2,400.00	\$2,400.00
TOTALS:		\$6,147.36	\$5,205.00	\$25,000.00	\$36,352.44

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

Executive Director Salary: This rate of \$101.04 per hour is the full burdened and overhead rate for the Executive Director. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes and processing fees, PTO, and medical and retirement benefits) as well as a proportion of organizational administrative costs. The Executive Director will spend minimal time on this project in planning and management.

Restoration Program Director Salary: This rate of \$53.53 per hour is the full burdened and overhead rate for the Restoration Program Director. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes and processing fees, PTO, and medical and retirement benefits) as well as a proportion of organizational administrative costs. The Restoration Program Director will spend significant time on this project in planning, management, and as-needed supervision of restoration technicians, volunteers, and the conservation corps crew.

Restoration Technician Salary: This rate of \$28.61 per hour is the full burdened and overhead rate for the Restoration Technician. This includes the full hourly burdened rate (including hourly cost of worker’s compensation insurance, payroll taxes and processing fees, PTO, and medical and retirement benefits) as well as a proportion of organizational administrative costs. The Restoration Technicians will spend significant time on this project performing on-the-ground fieldwork.

Trail Consultant: This rate of \$40/hour is the flat wage paid to the trail consultant. The Trail Consultant will spend significant time on this project performing on-the-ground fieldwork and supervision of volunteers.

Trail Stewardship Volunteers: Volunteer time is valued at \$28.46/hour as calculated for California by Independent Sector: <https://independentsector.org/resource/the-value-of-volunteer-time/>. We will hold twelve separate three-hour volunteer events, and expect an average of six volunteers per event ($12 \times 3 \times 6 \times \$28.46 = \$6,147.36$).

Erosion Control and Plant Materials: Includes 500 linear feet of wattles at \$1.50/feet, 100 2-foot wooden stakes at \$ 0.50 each, 10 check dams at \$75 each, and 7 pounds seed at \$60/pound.

Trail Materials and Supplies: Includes three tons of natural rock for tread armoring at \$500/ton, three hand tools at \$39/tool, and ten pairs of leather gloves for volunteer use at \$8/pair.

Vehicle Day Rate: Includes 30 days of vehicle use at \$80/day.

2018 S.L. Gimbel Foundation APPLICATION

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
Marisla Foundation	\$225,000
Massen Greene Foundation	\$160,000
California Coastal Conservancy	\$135,400
Warne Family Endowment Fund	\$ 75,000
Schlinger Foundation	\$ 105,000
City of Laguna Beach	\$ 6,250
	\$
	\$

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
A. Gary Anderson Foundation	\$ 120,000	1/1/19
The Annenberg Foundation	\$ 50,000	6/30/18
Donald Bren Foundation	\$ 25,000	12/31/18
Kenneth A. Lester Family Foundation	\$ 18,000	12/31/18
Foundation for Sustainability and Innovation	\$ 10,000	5/31/18
REI, Inc.	\$ 10,000	4/27/18

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	\$358,909	22 %	Program Fees	\$297,060.74	19 %
Fundraising/Special Events	\$ 66,123.27	4 %	Interest Income	\$ 1,527.78	0 %
Corp/Foundation Grants	\$869,553	54 %	Other:	\$6283.02	1 %
Government Grants	\$0	0 %	Other:	\$	%

Notes:

These figures are for our most recently completed fiscal year, FY 2016-17. We have worked hard to make our paid restoration work more profitable, and expect our program fees to contribute a much greater percentage of our total revenue this fiscal year.

2018 S.L. Gimbel Foundation APPLICATION

VII. Financial Analysis

Agency Name: Laguna Canyon Foundation

Most Current Fiscal Year (Dates): From 2016 To: 2017

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
\$ 937578	\$ 773,391	\$ 146,168	\$ 18,019

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
937578	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	773,391 %	146,168 %	18,019 %

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
14 %	16 %	-2 %

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

2017 S.L. Gimbel Foundation APPLICATION

Quick Ratio: Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$ 1,009,035	\$ 6363	8555	117

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$ 415,579	\$ 66,400

Notes:

Our contributions in FY 2016-17 included a generous \$250,000 estate gift from one of our long-time major donors. While on the whole our average yearly revenue is on an upwards trend, this one-time gift resulted in a significant spike in revenue for FY 2016-17 that we do not expect to see repeated this year.

In addition, this Financial Analysis form has a bug that autofills the amounts in Question 2 (expense percentages) to match the amounts in Question 1 (actual expenses). Attempting to input the percentages changes the actual amounts in Question 1, making correction of the error impossible. Our actual expense percentages are as follows:

Program service expenses: 82%

Management and general expenses: 16%

Fundraising expenses: 2%

Laguna Canyon Foundation 2018-19 Budget		
Income		
	Individual Contributions	\$ 221,682
	Corporate Contributions	\$ 10,000
	Foundation Grants	\$ 795,714
	Government Contributions	\$ 3,000
	Other Earned Income	\$ 582,689
	Other Unearned Income	\$ 6,857
	Interest Income	\$ 32,850
	Total Income	\$ 1,652,792
Expenses		
	Executive Director Salary	\$ 110,109
	Other Salaries	\$ 283,211
	Payroll Taxes & Services	\$ 39,239
	Insurance	\$ 66,901
	Retirement	\$ 9,735
	Banking Fees	\$ 3,532
	Travel & Meetings	\$ 4,631
	Accounting	\$ 4,856
	Program Consultants	\$ 126,631
	Telephone, Website, Internet	\$ 5,656
	Office Supplies, Postage, Printing	\$ 5,708
	Other Program Expenses	\$ 750,067
	Total Expenses	\$ 1,410,276
	Revenue Less Expenses	\$ 242,516

SAMPLE Budget Comparison

	Actuals		Budget		Variance	
	Most Recently		Projections			
	Completed Year		Current Year			
	20 ¹⁶⁻¹⁷		20 ¹⁷⁻¹⁸			
Income						
Individual Contributions	425,032.27	-	221,682	-	-47%	-
Corporate Contributions	15,000	-	10,000	-	-33%	-
Foundation Grants	851,553	-	795,714	-	-6%	-
Government Contributions	3,000	-	3,000	-	-	-
Other Earned Income	298,243.76	-	582,689	-	98%	-
Other Unearned Income	5,100	-	6,857	-	34%	-
Interest & Dividend Income	1,527.78	-	32,850	-	2050%	-
Total Income	1,599,456.81	-	1,652,792	-	6%	-
Expenditures						
Personnel						
Salary CEO	100,274.8	-	110,109	-	10%	-
Salary Assistant	242,584.6	-	283,211	-	17%	-
Payroll Taxes	36,792.88	-	38,078	-	3%	-
Insurance - Workers' Comp	16,628.20	-	19,453	-	17%	-
Insurance - Health	35,884.78	-	33,078	-	-8%	-
Payroll Services	1,246.37	-	1,161	-	7%	-
Retirement	7,351.53	-	9,735	-	32%	-
Total Personnel	440,763.11	-	494,825	-	12%	-
General Program/Administrative						
Bank/Investment Fee	778.40	-	3532	-	354%	-
Publications	0	-	0	-	-	-
Conferences & Meetings	4,621.75	-	1,887	-	-59%	-
Mileage	1,977.61	-	2,744	-	39%	-
Audit & Accounting	2,800	-	4,856	-	73%	-
Program Consultants	147,277.09	-	126,631	-	-14%	-
Insurance Expense	12,895.98	-	14,370	-	11%	-
Telephone Expense - Land Lines	976.31	-	1,240	-	27%	-
DSL & Internet	1,840.25	-	2,304	-	25%	-
Website	2,532.21	-	2,112	-	-17%	-
Office Supplies	1,101.15	-	736	-	-33%	-
Postage & Delivery	4,154.35	-	1,996	-	-52%	-
Printing & Copying	17,164.48	-	2,976	-	-83%	-
Miscellaneous	544,995.56	-	750,067	-	38%	-
Total General Program/Administrative	743,115.14	-	915,451	-	23%	-
Total Expenditures	1,183,878.25	-	1,410,276	-	19%	-
Revenue Less Expense	415,578.56	-	242,516	-	-46%	-

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				
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	303,210.	215,881.	87,329.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	43,846.	43,846.		
10 Payroll taxes	70,914.	65,830.	5,084.	
11 Fees for services (non-employees):				
a Management				
b Legal	2,000.		2,000.	
c Accounting	7,142.		7,142.	
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 Sch O.)	90,146.	85,684.		4,462.
12 Advertising and promotion				
13 Office expenses	166.		166.	
14 Information technology				
15 Royalties				
16 Occupancy	11,215.		11,215.	
17 Travel	685.	685.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	257.		257.	
23 Insurance	9,844.		9,844.	
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 Parks Support and Servi	349,434.	347,564.	1,870.	
b Printing and Publicatio	10,673.		2,041.	8,632.
c Displays/Photos/Videos	9,190.	9,190.		
d Education	8,525.		8,525.	
e All other expenses	20,331.	4,711.	10,695.	4,925.
25 Total functional expenses. Add lines 1 through 24e	937,578.	773,391.	146,168.	18,019.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ if following SOP 98-2 (ASC 958-720)

Laguna Canyon Foundation 13/14

Balance Sheet

As of June 30, 2017 Cash Basis

Jun 30, 17

ASSETS

Current Assets 965,233.95

Fixed Assets 18,654.98

Other Assets 225,098.68

TOTAL ASSETS 1,208,987.61

LIABILITIES & EQUITY

Liabilities 669.12

Equity 1,208,318.49

TOTAL LIABILITIES 1,208,987.61

Laguna Canyon Foundation 13/14

Profit & Loss

July 2016 through June 2017

Cash Basis

Jul '16 - Jun 17

Ordinary Income/Expense

Income

4100-00 · Contributions	175,032.27
4100-03 · Reimbursements	297,060.74
4150-00 · Estate Planning & Gifts	250,000.00
4300-00 · Grants	869,553.00
4500-00 · Trust Management Fees	6,814.70
4700-00 · Merchandise Sales	1,426.72
4800-00 · Sublease Income	5,100.00
4900-00 · Investment Income	1,527.78

Total Income	<u>1,606,515.21</u>
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Cost of Goods Sold	<u>7,058.40</u>
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Gross Profit	<u>1,599,456.81</u>
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Expense

6100-00 · Staff Expenses	593,873.95
6200-00 · Office Operations	74,626.22
7100-00 · Program Services	214,094.80
8100-00 · Park Services	297,849.55
9100-00 · Fundraising	3,433.73

Total Expense	<u>1,183,878.25</u>
---------------	---------------------

Net Ordinary Income	<u>415,578.56</u>
---------------------	-------------------

Net Income	<u><u>415,578.56</u></u>
------------	--------------------------

**Laguna Canyon Foundation
Board of Directors**

Michelle Kremer, President
As an Individual

Elisabeth Brown, Ph.D., Vice President
As an Individual

Peter Kote, Vice President
As an Individual

Lance Vallery, Vice President
Representing Laguna Greenbelt, Inc

Mark Draper, Treasurer
As an Individual

Carolyn Wood, Secretary
Representing Laguna Canyon Conservancy

Stacy Blackwood
Representing OCParks

Andrew Cmiel
As an Individual

Ken Frank
As an Individual

Dave Csira
As an Individual

Johanna Felder
Representing Village Laguna

Scott Ferguson
As an Individual

Charles Fletcher
As an Individual

Calen Offield
As an Individual

Derek Ostensen
As an Individual

Richard Ramsey
As an Individual

Rob Zur Schmide
Representing City of Laguna Beach

Alternates

Barbara Norton
Representing OC Parks - Voting Alternate

Kelly Boyd
*Representing City of Laguna Beach - Voting
Alternate*

S.L. Gimbel Foundation Fund 2016 Grant Report – Laguna Canyon Foundation

*** 1. Name of your organization.**

Laguna Canyon Foundation

*** 2. Grant #**

20160820

*** 3. Grant Period**

12/1/2016 - 11/30/2017

*** 4. Location of your organization**

City

Laguna Beach

State

California

*** 5. Name and Title of person completing evaluation.**

Theresa Karasek, Operations and Communications Manager

*** 6. Phone Number**

9494978324

*** 7. Email address.**

theresa@lagunacanyon.org

*** 8. Total number of clients served through this grant funding:**

Approximately 500,000 park users per year

*** 9. Describe the project's key outcomes and results based on the goals and objectives. Use the following format:**

State the Goal:

State Objective 1:

Describe the Activities, Results and Outcomes for Objective 1:

State Objective 2 (if applicable):

Describe the Activities, Results and Outcomes for Objective 2:

State Objective 3 (if applicable):

Describe the Activities, Results and Outcomes for Objective 3:

Goal: To restore and protect native habitat and establish a safe, enjoyable, and sustainable multi-use trail in Laguna Coast Wilderness Park.

Objective I: Complete the closure and rehabilitation of the old, badly-eroded alignment of Laguna Ridge Trail in LCWP.

The old trail alignment has been fully closed, erosion control is in place, has been planted with native container plants, seed and cactus pads, and is well on its way to becoming fully revegetated as native habitat.

Objective II: Complete fine-tuning on the 0.3 mile roughed-in reroute and address emergent threats to trail and habitat resulting from this summer's wildfire in the area.

The reroute has been fully completed and fine-tuned. It has held up remarkably well to the heavy rains we received this winter and to the heavy use it is receiving, demonstrating that it is much more sustainable than the old trail alignment. Through a combination of targeted erosion control and weed surveying and management, the burned area is returning to intact, healthy habitat. In addition, the dozer scar left from fire suppression activities has had erosion control installed, has been planted with native container plants, seed and cactus pads, and is also well on its way to becoming fully revegetated as native habitat.

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

Although the clear majority of feedback on this project was positive, there was a small group of mountain bikers who were unhappy that the old, deeply-eroded trail alignment was obliterated because it provided them with a type of riding challenge that was otherwise not available in this park.

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

We waged a lengthy campaign on social media to attempt to explain the reasons for doing what we did and the process we went through with OC Parks to develop our plan. We also held a public Trails Forum to provide an in-person arena for public feedback and participation. Through this process we have learned important lessons and made more connections with this small but important user group—a few riders who were initially critics of our work on Laguna Ridge Trail are now involved in our volunteer program, and one has become a member of our Trails Committee.

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

A large infestation of Sahara mustard, a highly-invasive nonnative plant, was identified during weed surveying and through a combination of OCCC and volunteer labor, over 65 bags of this weed were pulled and removed from the burned area.

We successfully responded to a small group of mountain bikers unhappy with the trail reroute (see Question 10). As a result of our outreach efforts, we successfully opened lines of communication with the mountain biking community, strengthening our relationship, improving the way we talk about and publicize our trail improvement efforts, and achieving buy-in from key members of this group. This buy-in and focus on communication and partnership will lead to improved relations between Laguna Canyon

Foundation and the mountain biking community in the future, resulting in an engaged, enthusiastic community and making our work easier in the future.

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

The newly-rerouted trail has been fine-tuned, is holding up well to user- and weather-related impacts, and has received positive feedback from user groups. The area burned in the fire is revegetating quickly with native species, and further erosion damage from weather, new trail construction and shortcutting has been minimized. Native vegetation is re-establishing on the old trail alignment and the dozer scar.

The rerouting of the trail will result, long-term, in improved habitat, reduced erosion, and improved user experience. By closing the eroded trail and finetuning the reroute, we have created a safe, sustainable trail that will hold up to heavy use for years to come while reducing habitat impacts and erosion of both the trail itself and the surrounding landscape. Brushing and planting native species on the old trail alignment, unauthorized social trails, and burned area will discourage users from going off-trail, giving the habitat a chance to recover from both the fire and human impacts. Revegetating with native species and responding quickly to the initial infestation of invasive Sahara mustard will also help ensure the recovery of native wildlife habitat, rather than a bare landscape overrun with invasive species, as may have happened if we had not worked to establish native species. This grant allowed us the funding to quickly respond to the fire damage and complete a successful trail reroute. The long-term outcome of this work will be a healthy, resilient native ecosystem, robust wildlife habitat for a variety native species, and a safe, sustainable, and fun trail able to withstand heavy use by both hikers and mountain bikers.

Please use the following spaces to provide any client stories, anecdotes, or quotes to showcase the success and impact you were able to achieve due to this funding.

*** 15. Please relate a success story:**

Trail work (including drainage improvement, building structures, tread improvement, sign installation, brushing and naturalization) was accomplished with a combination of staff and volunteer labor totaling over 200 hours of labor. This work paid off, resulting in a new trail that held up remarkably well to the heavy rains the area received over winter and spring. The erosion control also succeeded in preventing runoff from the new trail from damaging the burned area while it revegetated and recovered from the fire damage.

16. Please relate a success story here:

Laguna Canyon Foundation staff members used a truck-mounted water tank, water pump and hoses to keep all the container plants watered from the time of planting last spring throughout the hot summer months until the rains returned in the fall, resulting in a survival rate of over 75%.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project	Actuals
Personnel: Restoration Director	62 hours at \$25/hr = \$1550 x 25% = \$387.5			1937.50	1937.50	\$ 2,070.25
Personnel: Trail consultant	62 hours at \$40/hr = \$2480 x 25% = \$620			3100.00	3100.00	\$ 3,100.00
Interpretive signage	2000		1000.00	1000.00	2000.00	\$ 704.39
Personnel: Executive director	10 hours at \$41/hr = \$410 x 25% = 512.5			512.50	512.50	\$ 753.41
Personnel: Contract crew	5 weeks at \$4200/wk = \$21,000		8400.00	12600.00	21000.00	\$ 12,600.00
Materials and supplies - Straw wattles, check dam materials (lumber, metal posts, wire)	500 linear ft of wattles at \$1.50/ft = \$750 35 check dams at \$75 per check dam = \$2625			3375.00	3375.00	\$ 3,352.58
Plant materials - Native seeds and plant containers	3 lbs seed at \$60/lb = \$180 1 gallon container plants at \$6/plant x 100 = \$600		180.00	600.00	780.00	\$ 600.00
Equipment	Battery powered reciprocating saw and circular saw kit = \$428			428.00	428.00	\$ 372.37
Personnel: Trail stewardship volunteers	12 hours per event x 8 volunteers x \$26.87/hour	2579.52			2579.52	\$ -
TOTALS:		2579.52	9580.00	23553.00	35712.52	\$ 23,553.00

2018 S.L. Gimbel Foundation APPLICATION

VII. Financial Analysis

Agency Name: Laguna Canyon Foundation

Most Current Fiscal Year (Dates): From 2016 To: 2017

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
\$ 937578	\$ 773,391	\$ 146,168	\$ 18,019

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
937578	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	773,391 %	146,168 %	18,019 %

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
14 %	16 %	-2 %

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

2017 S.L. Gimbel Foundation APPLICATION

Quick Ratio: Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$ 1,009,035	\$ 6363	8555	117

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$ 415,579	\$ 66,400

Notes:

Our contributions in FY 2016-17 included a generous \$250,000 estate gift from one of our long-time major donors. While on the whole our average yearly revenue is on an upwards trend, this one-time gift resulted in a significant spike in revenue for FY 2016-17 that we do not expect to see repeated this year.

In addition, this Financial Analysis form has a bug that autofills the amounts in Question 2 (expense percentages) to match the amounts in Question 1 (actual expenses). Attempting to input the percentages changes the actual amounts in Question 1, making correction of the error impossible. Our actual expense percentages are as follows:

Program service expenses: 82%

Management and general expenses: 16%

Fundraising expenses: 2%

DEC 18 1995

Laguna Canyon Foundation
PO Box 4895
Laguna Beach, CA 92652

Employer Identification Number:
33-0441816
Case Number:
95-5310031
Contact Person:
Angela K. Clark
Contact Telephone Number:
(714)643-6266
Our Letter Dated:
June 14, 1991
Caveat Applies:
No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization which is not a private foundation until the expiration of your advance ruling period.

Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Your exempt status as an organization described in section 501(c)(3) of the Internal Revenue Code is still in effect.

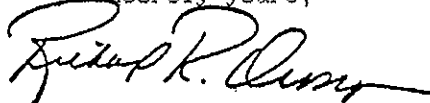
Grantors and contributors may rely on this determination until the Internal Revenue Service publishes notice to the contrary. However, a grantor or a contributor may not rely on this determination if he or she was in part responsible for, or aware of, the act or failure to act that resulted in your loss of section 509(a)(1) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(1) organization.

If we indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



Richard R. Orosco
District Director

1050(CG)