ORIGINAL

The Community Foundation

Serving the Counties of Riverside and San Bernardino

2013 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant: $25,000

20130833

Organization / Agency Information

Organization/Agency Name: **McPherson Magnet Education Foundation** 19253		
Physical Address: **333. S. Prospect Ave.**		*City/State/Zip* **Orange, CA 92869**
Mailing Address: **333. S. Prospect Ave.**		*City/State/Zip* **Orange, CA 92869**
CEO or Director: **Jeanne Bentley**		*Title:* **Principal, McPherson Magnet School**
Phone: **(714) 997-6384**	*Fax:* **(714) 628-4321**	*Email:* **jbentley@orangeusd.org**
Contact Person: **Cheryl Robertson**		*Title:* **3rd Grade Teacher**
Phone: **(714) 390-8604 cell**	*Fax:* **(714) 628-4321**	*Email:* crobertson@orangeusd.org
Web Site Address: **www.mcphersonfoundation.com**		*Tax ID:* **33-0776477**

Program / Grant Information

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

Program / Project Name: **An Apple for My iPod**		
Amount of Grant Requested: **$25,000**	*Total Organization Budget* **$90,637**	*Percentage of Organization's Total Budget used for Administration:* *< 1%*
Purpose of Grant Request (one sentence): **The Purpose of the Grant Request is to provide Apple TVs, iPads, and training for 35 teachers and to provide the third grade with 3 sets of 8 iPads for cooperative learning.**		

Signatures

Board President / Chair: (please print) **Chris Ferry** **chrisferryatc@gmail.com**	*Title:* **President**
Signature: Christopher C Ferry	*Date:* 9/27/13
CEO / Director: (please print) **Jeanne Bentley** **jbentley@orangeusd.org**	*Title:* **Principal, McPherson Magnet School**
Signature: Jeanne Bentley	*Date:* 9-27-13

2013 S.L. Gimbel Foundation Fund APPLICATION
Narrative

Please provide the following information by answering all questions (I to IV) in **THREE (3) typed pages, 12 Font, One Inch Margins.** Please be thorough, clear, specific, and concise.

I. Organization Background; Target Population:

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

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

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

II. Project Information:

A) Statement of Need

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

B) Project Goal, Objectives and Methodology

1. State your project goal. Describe your project. How does your project meet the community need? What is unique and innovative about this project?
2. State up to three objectives. Objectives should be specific, measurable, action-oriented, realistic, and time-specific. Specify the activities you will undertake to meet each objective. Use the following format for your objectives and respective activities:

   Objective I:
   Activities:
   Objective II:
   Activities:
   Objective III:
   Activities:

   Provide a timeline for implementing the project?
3. Who will this grant serve? Describe your target population. How many people will be impacted? Provide a breakdown: Number of Children, Youth, Adults, Seniors, Animals. Include a detailed list of activities and number of participants for each activity.
4. How does this project relate to other existing projects in the community? Who else in the community is providing this service or has a similar project? Who are your community partners (if any)? How are you utilizing volunteers?

C) Project Outcomes and Evaluation

1. What are the key anticipated outcomes of the project and impact on participants?
2. How will you know if you have achieved the expected outcomes?
3. How will progress towards the objectives be tracked and outcomes measured?

D) How will you use the grant funds?

III. Project Future

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

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

A) 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?

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

2013 S.L. Gimbel Foundation Fund Narrative

I. Organization Background; Target Population:
The Mission of McPherson Education Foundation, a nonprofit public benefit corporation composed of parents and staff, is to raise funds for the benefit of the students of McPherson Magnet School. Its main objective for the past 16 years is to enhance educational opportunities and achievement for all students in the areas of math, science, and technology.

In the last three years, through the donations of parents, staff, and community sponsors, the McPherson Education Foundation has accomplished:
1. Casio Signature XJ-M250 3D Ready DLP Projectors installed in all 35 classrooms.
2. Two new 35-station computer labs used daily on a school-wide basis
3. Science materials, equipment, and kits to support inquiry based K-8 Science focus.
4. Invested in the Mind Institute's K-8 ST Math software applications (intervention and support)
5. Provided teacher laptops for lesson creation, upgraded classroom computers, and enhanced technology infrastructure with wireless connection.

The vision of McPherson Magnet School is to integrate all aspects of learning and education, by using an inquiry-based and thematic teaching approach that focuses on science, mathematics, and technology. Our staff expects the students to utilize a variety of methods to demonstrate their learning, to take risks, and to use productive skills. We are committed to the following:
1.Educating the whole child to reach their greatest potential 2.Valuing a range of learning styles. 3. Utilizing a variety of learning tools and strategies. 4. Extending the learning environment beyond the walls of the classroom 5. Encouraging students as confident, lifelong learners.
We provide experiential learning excellence for all within the Orange Unified School District geographical area who enter a lottery-based admittance to the school. Approximate 930 students create a population which reflects the City of Orange: 1% African American, 13% Asian, 1% Filipino, 34% Hispanic or Latino, 1% Pacific Islander; 46% White, 1% American Indian, and 3% other. Within that population, students come from families with special needs: 14% Socioeconomic Disadvantaged, 6% English Learners, and 12% Students with Disabilities.

II. Project Information, Statement of Need, Project Goal, Objectives, and Methodology:
Teaching is a multi-media experience at McPherson as lessons are crafted online using teacher and student laptops and presented on large screens. We seek to seamlessly view lesson presentations, learning objectives, interactive student notebooks with text, graphics, video, and audio that can optimized through Apple TV and iPod systems. Our project goal is to equip every classroom with an Apple TV and each teacher with an iPad with case and keyboard to AirPlay digital content through our new projectors.
Orange Unified School District is following the State of California's directive to no longer administer the annual STAR pencil/paper tests with students, but move to the 2014 Common Core Standards via computer responses on iPads. To achieve this end, we need to educate our students and teachers through training and support using iPads so they will become proficient for testing as well as daily classroom use. iPads provide superior resolution and provide opportunities for all students to be actively engaged in group environments.
We want to purchase an additional 24 iPads to be used in the three 3rd grade classrooms. Students will gain experience on the iPads, increase their technical abilities, and communicate

their student creations through the Apple TV function on the projectors. To facilitate the paradigm shift in teachers' technical abilities, we need to hire a Technical Support Specialist for 2 hours per day to instruct teachers and brainstorm applications and lesson planning utilization of the iPads in class.

District financial support has been substantially curtailed due to lack of funding. The McPherson Education Foundation raised $25,764 at Open House, half the required cost of the iPad and Apple TV Project, from parents, staff, and community sponsors. We seek the other half of the funding from the S.L. Gimbel Foundation.

Project Goal, Objectives and Methodology:

All classrooms will be furnished with an Apple TV and a teacher's iPad. The Apple TV will seamlessly stream audio and video podcasts through iPad's AirPlay feature though our DLP 3D Ready Projectors, providing a multitude of digital iPad content for the class to experience. Interaction These USB models allow Wi-Fi connectivity so users can display wireless presentations from a laptop or by using a smart phone application.

Unique and innovative to McPherson, students will be actively involved in creating their own technological learning outcomes which align to the new Common Core standards. By producing newscasts, presentations, videos, i-Movies, Power Points, Prezis, and Glogsters, our learners will be able to clearly articulate their knowledge and expertise of informational text while perfecting critical 21st century career skills in technology, communication, and critical thinking.

Objective I: Students will be able to clearly see & experience daily PearsonSuccessNet.Com, Orange Unified School District's adopted math program's online interactive video lesson presentation, to enable all students to attain mastery of the state adopted math standards. It is expected that current mastery level of the school will increase to 90% (from 85.6% proficiency).

Activities: Lesson instruction will be presented to the class along with guided practice via an online component to help all learners, independent upon their personnel level of mastery. Independent practice and subsequent math games will follow to reinforce the lessons.

Objective II: Students will create movies, animations, or podcasts to be presented using the iPads and Apple TV AirPlay. Project based learning will increase learning and long term memory, and enable students to learn with the new National Adopted Core Standards.

Activities: Collaborative student groups will create science lessons or reenact a novel, based upon research, videotape the learning process. and present findings to the class and community.

Objective III: Students will become engaged and motivated to learn, taking on a dynamic role in the learning process. School API scores will increase to prepare students for college and career.

Activities: Students become active participants as they work math problems on the board from their desk, analyze the statistics of a football game, create a work of art, circle-highlight-underline during lectures, and add comments and opinions to a class-discussion blog.

Timeline of Project Implementation:

- December 2013: Interview Technical Support Specialist to collaborate with teachers for 2 hours per day @ $20 per hour.
- January 2014: Purchase order for 35 iPads and Apple TVs (classroom) and 24 iPads (3rd)
- March 2014: Installation and utilization should be operational in March, 2014.

McPherson's target population is 930 children, grades K-8, thirty-eight teachers, and ten support staff. McPherson has a large number of special education students in general education

classes, second language learners, at-risk students, hearing impaired, and students with learning and processing disabilities. Visual processing will be greatly improved with pictographic portrayals that capture students' attention and help them create connections and meaning.

Other schools in Orange Unified School District receive financial support from Title 1 funds. McPherson's population does not qualify for Title 1, and therefore extra funding is not available. **In September of 2012,** McPherson's Star Mission raised $28,442. The S.L. Gimbel Foundation matched this with $25,000 additional toward the purchase of Casio LCD Projectors for every classroom at McPherson. In May 2013, McPherson Education Foundation raised an additional $25,764 in our Open House Drive and an additional $9,138 for Casino Night. This is the money we are requesting matching funds of an additional $25,000 from the S.L. Gimbel Foundation for the purchase of Apple TVs and iPads. Community partners, parents and board members have all contributed toward raffle baskets and matching individual donations programs. One Board member underwrote all expenses throughout the year and matched funds to encourage other parents at McPherson to contribute. His goal was to ensure that all monies collected go toward math, science, and technology, not spent in promoting and publicizing.

Project Outcomes and Evaluation:
Students, teachers, and community members will be able to clearly present, communicate, and view learning objectives, curriculum standards, and evaluate meaningful student understandings through the use of high quality projection systems. McPherson will reach its projected API growth goals due to improved visual acuity and increased use of technology school-wide as an enhancement to student learning. Students using on-line programs such as Envision Math will continue to advance in their performance scores. Progress will be tracked each trimester by Houghton Mifflin Summative Assessments and Envision Math Summative Assessments.
In 2014, CA Common Core written test results will verify curriculum content is mastered and that student proficiency is increasing.

III. Project Future:
Compared with conventional older model Dell laptops, the Apple TVs and iPads will create visually stimulating presentations. Interactive cooperative learning pods will be dynamically incorporated into daily lessons.

IV. Governance, Executive Leadership and Key Personnel/Staff Qualifications
The by-laws specify the governing of McPherson Education Foundation Board. All decisions require that funds be used specifically for our math, science, and technology focus. Our Technology Committee, composed of Board members having expertise in computer network engineering, research, and development, have researched the iPads, Apple TVs, and will select the Technical Support Specialist to be the best suited for our long-term needs.
Orange Unified School District technology department has agreed to provide Brocade Access Points throughout the school by summer of 2014. This will upgrade the current Wifi use of the school to accommodate our increased online presence. They have proposed a plan to select one teacher in each school, equip them with eight iPads, and provide training in lesson preparation and iPad usage. We intend to shadow this training and extend it to other grade levels in the school. The Education Foundation's Technology Committee will oversee the purchase and team with OUSD District in its implementation and installation.

2013 S.L. Gimbel Foundation APPLICATION

V. Project Budget

A) Please provide a detailed line-item budget for your project by completing the table below. Include all sources of funding for the proposed project.

Line Item Description	Line Item Explanation (Formula/equation used as applicable. Example: 40 books @ $100 each = $4000)	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Apple TVs	35@ 100 ea=$3,500.00	1,750.00		1,750.00	$3,500.00
iPads w/Case & Keyboard	35@$623.62=21,826.70	6,040.05		15,786.65	21,826.70
iPads w/Case & Keyboard	24@$623.62=14,926.70	7,463.35		7,463.35	14,926.70
Tax	8% x $40,293.58= $3,223.50	3,223.50			3,223.50
Technical Support Specialist	2hrsx $20/hr x 180 days= $7,200.00	7,200.00			7,200.00
TOTALS:		$25,676.90		$25,000.00	$50,676.90

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
McPherson Education Foundation parents' donations	$25,764.00

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
S.L. Gimbel Foundation	$25,000.00	12-15-13

VII. Financial Analysis

Agency Name: McPherson Education Foundation
Most Current Fiscal Year (Dates): From July 1, 2013 **To:** June 30, 2014

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

Program to Total Expenses Ratio: Percentage of expenses used to support programming versus how much is spent for general management and fundraising. A general rule is that at least 75 percent of total expenses should be used to support programs – the higher the percentage the better.

Program Expenses	/Total Operating Expenses	= Program Expense Ratio
$ 72 (stamps)	$ 0 (covered by a private door)	< 1 %

990: Part IX, Column B, Line 25 990: Part IX, Column A, Line 25

Adminstrative Expense (100%-Program Expense ratio) per 990 above	Percentage of Organization's Current Total Budget used for Administration (from cover page)	Differential
0 %	< 1 %	0 %

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

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
$26,992.29	$ 0	$500 (tax prep pending)	0.53%

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
$ 26,992.29	$ (47,281)

Notes:
There are no salaries. The McPherson Education Foundation Board is voluntary. All expenses have been paid by one donor so all donations can go toward our Math, Science, and Technology focus.

Request: Our Winter Break begins on December 13, 2013. Our mail will be held for 3 weeks while we are on break and the backlogged mail will be slow in arriving to the school in January. If this amazing grant is awarded, would it be possible to receive an email notification to Cheryl Robertson crobertson@orangeusd.org ? We appreciate your consideration.

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	$0		Program Fees	$0	
Fundraising/Special Events	$63,344	71.7%	Interest Income	$0	
Corp/Foundation Grants	$25,000	28.3%	Other:	$0	
Government Grants	$0		Other:	$0	

Notes:
Fall 2012 Star Mission: $28,442
Winter 2012 Casino Night: $9,138
Spring 2013 Open House: $25,764

VIII. Application submission check list:

	Submit FOUR (4) Copies: 1 ORIGINAL (WITH ORIGINAL SIGNATURES) and 3 copies, collated and stapled together of the following:		**Submit ONE (1) Copy:**
X	Completed Grant Application Form (cover sheet, narrative (3 pages maximum), budget and sources of funding, financial analysis page	X	A copy of your current 501(c)(3) letter from the IRS
X	A list of your Board members and their affiliations	Within 990EZ	A copy of your most recent year-end financial statements (audited if available; double-sided)
X	Your current operating budget and the previous year's actual expenses	X	A copy of your most recent 990 (double-sided) 990EZ for 2011
X	Part IX only of the 990 form, Statement of Functional Expenses (one page) 990-EZ form is attached for 2011. The McPherson Education Foundation files taxes on the fiscal year, which would be in July 2013 for the 2012 year. Our accountant has filed an extension so we will submit the tax return by November 1, 2013. The reports are currently being prepared.		
X	For past grantees, a copy of your most recent final report. See 7/1/2013 through 6/30/2014 Budget, Income/Expense Comparison by Category, and 2012 SL Gimbel Foundation Grant Evaluation (submitted 9/11/2013)		

McPherson Magnet Education Foundation			2013-2014	
Executive Board				
President	Chris Ferry	Parent	Ergonomic Coordinator	Mission Hospital
Vice-President	Luz Tena	Parent	Anaylist	QBE First
President Elect	Dave Tabb	Parent	President/CEO	DT Exotics Inc.
Treasurer	Wanda McWhirter	Parent	Supervising Court Mediator	Orange County Superior Court
Secretary	Open			
Board Members				
	Keith Charette	Parent	General Contractor	Self-Employed
	Kayee Conrad	Teacher	7th/8th Grade	McPherson Magnet School
	Cheryl Robertson	Teacher	3rd Grade	McPherson Magnet School
	Brian Wade	Parent	Computer Programmer	Quandis
	Dave Yang	Parent	Chemist	Beckman Industries
	Herman Rangel	Parent	Social Services Agent	County of Orange
	Tara Randall	Teacher	1st Grade	McPherson Magnet School
	Glen Warren	Teacher	7th/8th Grade	McPherson Magnet School
	Kacie Andrews	Parent	Pre-School Director	River 47 Evangelical Church
	Doug Huennekens	Parent	CPA	Self-Employed
	Open			
Ex-Officio Members				
	Jeanne Bentley	Teacher	Principal	McPherson Magnet School
Advisory Board Members				
	Lorianne Ferry	Parent	Project Manager	Walt Disney Company
	Jose Tena	Parent	Mechanic	Tuttle Click Automotive Group
	Jeff Taylor	Parent	PLC Programmer	JWC Environmental
	Judy Denenny	Teacher	6th Grade	McPherson Magnet School
	Jim Harrington	Parent	Computer Network Engineer	Right Click
	Christine Horeczko	Parent	Stay at home mother	
	Ed Andrade		Law Enforcement	Retired
	Will Hare	Parent	Photographer	Self-Employed

Budget 2011/2012:4

7/1/2013 through 6/30/2014 Using 2013.2014 Budget

Category Description	7/1/2013 Actual	- Budget	6/30/2014 Difference
Discretionary			
Science Fair	-54.71	-1,000.00	945.29
TOTAL Discretionary	**-54.71**	**-1,000.00**	**945.29**
Income			
Holiday Boutique	0.00	1,000.00	-1,000.00
Open House 2013	1,150.00	0.00	1,150.00
Open House 2014	0.00	20,000.00	-20,000.00
Star Missin 2014	1,572.49	25,000.00	-23,427.51
Casino Night			
Other Casino Night	0.00	-5,000.00	5,000.00
TOTAL Casino Night	0.00	-5,000.00	5,000.00
TOTAL Income	**2,722.49**	**41,000.00**	**-38,277.51**
Mandatory Expenses			
Administrative			
Bank Charge	0.00	-100.00	100.00
Insurance	0.00	-500.00	500.00
Other Administrative	-72.00	-300.00	228.00
Tax, Fed	0.00	-500.00	500.00
Tax, State	0.00	-20.00	20.00
TOTAL Administrative	-72.00	-1,420.00	1,348.00
Aquarium Maintenance			
Other Aquarium Maintenance	-90.00	-1,200.00	1,110.00
TOTAL Aquarium Maintenance	-90.00	-1,200.00	1,110.00
Earth Lab	0.00	-1,500.00	1,500.00
Science Supplies			
Elementray Supplies	-2,399.81	-18,000.00	15,600.19
Middle School Supplies			
6th grade	0.00	-1,000.00	1,000.00
Conrad - 7th & 8th Science	0.00	-2,500.00	2,500.00
Cooking Wheel 7th grade	0.00	-1,000.00	1,000.00
MESA 6th grade	0.00	-2,200.00	2,200.00
MESA 7th & 8th	0.00	-1,000.00	1,000.00
TOTAL Middle School Supplies	0.00	-7,700.00	7,700.00
Robotics K-8th	0.00	-2,000.00	2,000.00
TOTAL Science Supplies	-2,399.81	-27,700.00	25,300.19
Technology Repairs & Upgrades			
Other Technology Repairs & Upgrades	0.00	-8,180.00	8,180.00
TOTAL Technology Repairs & Upgrades	0.00	-8,180.00	8,180.00
TOTAL Mandatory Expenses	**-2,561.81**	**-40,000.00**	**37,438.19**
Unassigned			
TOTAL Unassigned	**0.00**	**0.00**	**0.00**
OVERALL TOTAL	**105.97**	**0.00**	**105.97**

Reconciliation Report

Farmers & Merchant
9/9/2013

Reconciliation Summary

BANK STATEMENT -- CLEARED TRANSACTIONS:

Previous Balance:			26,086.16
Checks and Payments	0	Items	0.00
Deposits and Other Credits	1	Item	1,572.49
Service Charge	0	Items	0.00
Interest Earned	0	Items	0.00
Ending Balance of Bank Statement:			27,658.65

YOUR RECORDS -- UNCLEARED TRANSACTIONS:

Cleared Balance:			27,658.65
Checks and Payments	3	Items	-666.36
Deposits and Other Credits	0	Items	0.00
Register Balance as of 9/9/2013:			26,992.29
Checks and Payments	0	Items	0.00
Deposits and Other Credits	0	Items	0.00
Register Ending Balance:			26,992.29

Reconciliation Report

Farmers & Merchant
9/9/2013

Uncleared Transaction Detail up to 9/9/2013

Date	Num	Payee	Memo	Category	Clr	Amount
Uncleared Checks and Payments						
5/23/2013	1544	Allison Barrett	celephane	Open House EXP 2013		-30.24
6/30/2013	1552	Carolina Biological		Science Supplies:Middl...		-546.12
9/9/2013	1558	Aquarium Solutions	#15115	Aquarium Maintenance		-90.00
Total Uncleared Checks and Payments				3 Items		-666.36
Uncleared Deposits and Other Credits						
Total Uncleared Deposits and Other Credits				0 Items		0.00
Total Uncleared Transactions				3 Items		-666.36

Account Balances - As of 9/9/2013

(Includes unrealized gains)

As of 9/9/2013

Account	9/9/2013 Balance
Bank Accounts	
BofA	0.00
Farmers & Merchant	26,992.29
Prudential	0.00
TOTAL Bank Accounts	**26,992.29**
Investment Accounts	
Investment	0.00
TOTAL Investment Accounts	**0.00**
OVERALL TOTAL	**26,992.29**

Form **990-EZ**

Department of the Treasury
Internal Revenue Service

Short Form
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

► Sponsoring organizations of donor advised funds, organizations that operate one or more hospital facilities, and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions). All other organizations with gross receipts less than $200,000 and total assets less than $500,000 at the end of the year may use this form.

► *The organization may have to use a copy of this return to satisfy state reporting requirements*

OMB No 1545-1150

2011

Open to Public Inspection

A For the 2011 calendar year, or tax year beginning 7/01, 2011, and ending 6/30, 2012

B Check if applicable
- [ ] Address change
- [ ] Name change
- [ ] Initial return
- [ ] Terminated
- [ ] Amended return
- [ ] Application pending

C
MCPHERSON EDUCATION FOUNDATION
333 SOUTH PROSPECT
ORANGE, CA 92869

D Employer identification number: 33-0776477

E Telephone number: 714-997-6384

F Group Exemption Number ►

G Accounting Method: [X] Cash [ ] Accrual Other (specify) ►

H Check ► [X] if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

I **Website:** ► N/A

J **Tax-exempt status** (ck only one) — [X] 501(c)(3) [ ] 501(c) ( ) ◄(insert no.) [ ] 4947(a)(1) or [ ] 527

K Check ► [ ] if the organization is not a section 509(a)(3) supporting organization or a section 527 organization **and** its gross receipts are normally **not** more than $50,000. A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions). But if the organization chooses to file a return, be sure to file a complete return.

L Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts. If gross receipts are $200,000 or more, or if total assets (Part II, line 25, column (B) below) are $500,000 or more, file Form 990 instead of Form 990-EZ ► $ 56,637.

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I.)

Check if the organization used Schedule O to respond to any question in this Part I [X]

REVENUE	1	Contributions, gifts, grants, and similar amounts received		1	1,949.
	2	Program service revenue including government fees and contracts		2	
	3	Membership dues and assessments		3	
	4	Investment income		4	
	5a	Gross amount from sale of assets other than inventory	5a		
	b	Less: cost or other basis and sales expenses	5b		
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)		5c	
	6	Gaming and fundraising events			
	a	Gross income from gaming (attach Schedule G if greater than $15,000)	6a		
	b	Gross income from fundraising events (not including $ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds $15,000)	6b	54,688.	
	c	Less: direct expenses from gaming and fundraising events	6c	3,624.	
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)		6d	51,064.
	7a	Gross sales of inventory, less returns and allowances	7a		
	b	Less: cost of goods sold	7b		
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		7c	
	8	Other revenue (describe in Schedule O)		8	
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ►		9	53,013.
EXPENSES	10	Grants and similar amounts paid (list in Schedule O)		10	
	11	Benefits paid to or for members		11	
	12	Salaries, other compensation, and employee benefits		12	
	13	Professional fees and other payments to independent contractors		13	
	14	Occupancy, rent, utilities, and maintenance		14	
	15	Printing, publications, postage, and shipping		15	
	16	Other expenses (describe in Schedule O) SEE SCHEDULE O		16	100,294.
	17	**Total expenses.** Add lines 10 through 16 ►		17	100,294.
NET ASSETS	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	-47,281.
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)		19	146,589.
	20	Other changes in net assets or fund balances (explain in Schedule O)		20	
	21	Net assets or fund balances at end of year. Combine lines 18 through 20 ►		21	99,308.

BAA For Paperwork Reduction Act Notice, see the separate instructions.

Form **990-EZ** (2011)

TEEA0803L 08/05/11

CARLSON ACCOUNTANCY CORP.
17632 IRVINE BLVD., STE. 245
TUSTIN, CA 92780-3180
(714) 838-8090

October 24, 2012

MCPHERSON EDUCATION FOUNDATION
333 SOUTH PROSPECT
ORANGE, CA 92869

FILE COPY

Dear Board of Directors:

Enclosed is your 2011 Federal Return of Organization Exempt from Income Tax. The original should be signed at the bottom of page four. No tax is payable with the filing of this return. Mail your Federal return on or before November 15, 2012 to:

DEPARTMENT OF TREASURY
INTERNAL REVENUE SERVICE
OGDEN, UT 84201-0027

Enclosed is your 2011 California Exempt Organization Annual Information Return. The original should be signed at the bottom of page one. There is a balance due of $10 payable by November 15, 2012. Mail the California return on or before November 15, 2012 and make the check payable to:

FRANCHISE TAX BOARD
P.O. BOX 942857
SACRAMENTO, CA 94257-0701

Please be sure to call us if you have any questions.

Sincerely,

Roger W. Carlson, CPA

Budget 2011/2012:3

7/1/2012 through 6/30/2013 Using Budget 2012-13 revised

Category Description	7/1/2012 Actual	- Budget	6/30/2013 Difference
Discretionary			
Science Fair	0.00	-750.00	750.00
TOTAL Discretionary	**0.00**	**-750.00**	**750.00**
Income			
Casino Night 2012	5,034.00	5,000.00	34.00
Fresh and Easy	0.00	2,500.00	-2,500.00
Holiday Boutique 2012	0.00	1,000.00	-1,000.00
Open House 2012	720.00	0.00	720.00
Open House 2013	0.00	20,000.00	-20,000.00
Star Mission 2012	26,857.36	22,000.00	4,857.36
TOTAL Income	**32,611.36**	**50,500.00**	**-17,888.64**
Mandatory Expenses			
Administrative			
Bank Charge	-15.00	-600.00	585.00
Insurance	0.00	-500.00	500.00
Other Administrative	0.00	-800.00	800.00
Tax, Fed	0.00	-500.00	500.00
Other Administrative	0.00	-34.00	34.00
TOTAL Administrative	-15.00	-2,434.00	2,419.00
Aquarium Maintenance			
Other Aquarium Maintenance	-432.62	-1,200.00	767.38
TOTAL Aquarium Maintenance	-432.62	-1,200.00	767.38
Casino Night EXP 2012	-496.75	-8,000.00	7,503.25
Earth Lab	-1,292.57	-1,500.00	207.43
Open House 2012 EXP	-107.66	0.00	-107.66
Science Supplies			
Elementray Supplies	-3,037.64	-18,000.00	14,962.36
Middle School Supplies			
Conrad	-1,899.00	-1,800.00	-99.00
Marzolo	0.00	-800.00	800.00
Mesa	0.00	-2,000.00	2,000.00
Miller 6th grade	0.00	-900.00	900.00
TOTAL Middle School Supplies	-1,899.00	-5,500.00	3,601.00
TOTAL Science Supplies	-4,936.64	-23,500.00	18,563.36
TOTAL Mandatory Expenses	**-7,281.24**	**-36,634.00**	**29,352.76**
Unassigned			
STAR Mission EXP	0.00	-200.00	200.00
Technology Repairs & Upgrades			
Other Technology Repairs & Upgrades	-2,300.00	-12,916.00	10,616.00
TOTAL Technology Repairs & Upgrades	-2,300.00	-12,916.00	10,616.00
TOTAL Unassigned	**-2,300.00**	**-13,116.00**	**10,816.00**
OVERALL TOTAL	**23,030.12**	**0.00**	**23,030.12**

Income/Expense Comparison by Category - Last year:3

1/1/2012 through 9/23/2013

Category Description	6/24/2012-9/23/2013	1/1/2012-12/31/2012	Amount Difference
INCOME			
Casino Night 2012	34,138.00	9,138.00	-25,000.00
Open House 2012	720.00	27,435.69	26,715.69
Open House 2013	25,764.21	0.00	-25,764.21
Star Missin 2014	1,572.49	0.00	-1,572.49
Star Mission 2012	28,442.28	47,776.25	19,333.97
TOTAL INCOME	**90,636.98**	**84,349.94**	**-6,287.04**
OVERALL TOTAL	**90,636.98**	**84,349.94**	**-6,287.04**

IRS Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248364799
Mar. 31, 2011 LTR 4168C E0
33-0776477 000000 00
00015648
BODC: TE

MCPHERSON EDUCATION FOUNDATION
% M RUSSELL BAKKE
333 S PROSPECT ST
ORANGE CA 92869-4825

36622

Employer Identification Number: 33-0776477
Person to Contact: Mrs K. Hopton
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Mar. 22, 2011, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in April 1999.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

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

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

The Community Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS

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Chair of the Board

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Vice Chair of the Board

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Chief Financial Officer

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Grover Trask
Immediate Past Board Chair

Sean Varner

Dr. Jonathan Lorenzo Yorba
President and CEO

December 5, 2013

Ms. Jeanne Bentley
Principal
McPherson Magnet Education Foundation
333 S. Prospect Ave.
Orange, CA 92869

Dear Ms. Bentley:

Congratulations! A grant has been approved for **McPherson Magnet Education Foundation** in the amount of **$25,000** from the S.L. Gimbel Foundation. The **performance period for this grant is December 1, 2013 to November 30, 2014.** 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:

An Apple for My iPod: To provide Apple TVs, iPads and training for 35 teachers and to provide the third grade with 3 sets of 8 iPads for cooperative learning.

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, please sign and date the enclosed copy and return the original copy to The Community Foundation within the next two weeks. Please retain a copy of the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. The **Grant Evaluation is due on December 15, 2014** and a copy will be included with the check cover letter.

We wish you great success and look forward to working with you during the grant performance period.

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

Sincerely,

Celia Cudiamat
Executive Vice President

19253 McPherson Magnet Education Foundation 20130833 GIMB4

cf NATIONAL STANDARDS™
Confirmed in Compliance with National Standards for U.S. Community Foundations

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

The Community Foundation
Serving the Counties of Riverside and San Bernardino

3700 Sixth Street, Suite 200
Riverside, CA 92501
v) 951-684-4194 f) 951-684-1911
www.thecommunityfoundation.net

12/18/13

2013 S.L. Gimbel Foundation Fund

Grant Agreement

Organization: **McPherson Magnet Education Foundation**

Grant Amount: **$ 25,000** **Grant Number: 20130833**

Grant Period: **December 1, 2013 to November 30, 2014**

Purpose: **An Apple for My iPod: To provide Apple TVs, iPads and training for 35 teachers and to provide the third grade with 3 sets of 8 iPads for cooperative learning.**

1. Use of Grant Funds
Grant funds must be expended within the grant period, for the purpose and objectives described in your grant proposal. Grant funds may not be expended for any other purpose without prior written approval by The Community Foundation. If there are significant difficulties in making use of the funds as specified in your proposal, or if the grant funds cannot be spent within the grant period, notify us in writing promptly.

Formal requests for extensions or variances must be submitted to the Foundation's Board of Directors for approval a minimum of 60 days before the end of the grant period.

Requests for variances or extensions are reviewed on a case-by-case basis and approved by the Board of Directors. If a request is denied, unused funds must be immediately refunded to the Foundation.

2. Payment of Grant Funds
The grant funds will be paid in full by the Foundation upon receipt of the signed Grant Agreement. Challenge grant funds will be paid in full upon receipt of the signed Grant Agreement and upon receipt of documentation providing evidence that condition(s) of the challenge grant has/have been met.

3. Certification and Maintenance of Exempt Organization Status
This grant is specifically conditioned upon Grantee's status as an eligible grantee of The Community Foundation. The Foundation has obtained a copy of the Grantee's IRS determination letter. Grantee confirms that it has not had any change in its tax-exempt status, and shall notify the Foundation immediately of any such change.

4. Final Report and Records
The Grantee will submit the Grant Evaluation report per the deadline set forth in the award letter. This report includes a narrative on outcomes based on goals and objectives set forth in the grant proposal and an expenditure report documenting use of grant funds. If equipment was purchased, copies of receipts need to be included.

5. Grantee's Financial Responsibilities
Grantee will keep records of receipts and expenditures of grant funds and other supporting documentation related to the grant at least four (4) years after completion of the grant and will make such records of receipts, expenditures and supporting documentation available to the Foundation upon request.

6. Publicity
The Community Foundation expects publicity for the grant in two ways and will require documentation in your grant evaluation form that you will file at the end of the grant period.

1. *Organizational:* Acknowledge The Community Foundation in internal communication to staff and board, in brochures as appropriate; newsletters, annual reports and email blasts or e-newsletters.

2. *Press:* Publicity for The Community Foundation grant via press releases to local media.

The credit line of "Made possible in part by a grant from the **"S.L. Gimbel Foundation Advised Fund at The Community Foundation Serving the Counties of Riverside and San Bernardino"** is suggested. When your donors are listed in printed materials, include the S.L. Gimbel Foundation Advised Fund at The Community Foundation in the appropriate contribution size category. When publishing our name, please note the "The" at the beginning of our name is a legal part of our name. It should always be used and capitalized. Attaching our logo is also appreciated. Our logo can be downloaded from our website at www.thecommunityfoundation.net.

7. Indemnification

In the event that a claim of any kind is asserted against the Grantee or the Foundation related to or arising from the project funded by the Grant and a proceeding is brought against the Foundation by reason of such claim, the Grantee, upon written notice from the Foundation, shall, at the Grantee's expense, resist or defend such action or proceeding, at no cost to the Foundation, by counsel approved by the Foundation in writing.

Grantee hereby agrees, to the fullest extent permitted by law, to defend, indemnify, and hold harmless the Foundation , its offices, directors, employees, and agents, from and against any and all claims, liabilities, losses, and expenses (including reasonable attorneys' fees) directly, indirectly, wholly, or partially arising from or in connection with any act or omission by Grantee, its employees, or agents in applying for or accepting the Grant, in expending or applying the Grant funds or in carrying out any project or program supported by the Grant, except to the extent that such claims, liabilities, losses, and expenses arise from or in connection with any bad faith act or omission by the Foundation, its officers, directors, employees, or agent.

8. Termination

The Community Foundation may terminate this agreement, withhold payments, or both at any time, if, in the Community Foundation's judgment: a) The Community Foundation is not satisfied with the quality of the Grantee's progress toward achieving the project goals and objectives; b) the Grantee dissolves or fails to operate; c) the Grantee fails to comply with the terms and conditions of this agreement.

9. Limitation of Support

This Agreement contains the entire agreement between the parties with respect to the Grant and supersedes any previous oral or written understandings or agreements.

****

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

Jeanne Bentley	12-9-13
Signature	**Date**
Jeanne Bentley	Principal
Printed Name	**Title**

Organization: 19253 McPherson Magnet Education Foundation
Grant Number: 20130833

12/17/13

The Community Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS

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Grover Trask
Immediate Past Board Chair

Sean Varner

Dr. Jonathan Lorenzo Yorba
President and CEO

December 20, 2013

Ms. Wanda McWhirter, Treasurer
McPherson Magnet Education Foundation
211 S. Craig Drive.
Orange, CA 92869

Dear Ms.McWhirter:

The Community Foundation is pleased to enclose a grant check for **$25,000** 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 December 15, 2014 and is enclosed. 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."** Send copies of articles printed in local papers, stories in your agency newsletter, annual report, press releases, and other publications for our files.

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

Sincerely,

Celia Cudiamat
Executive Vice President

20130833 *36595* *GIMB*

Encl: Grant Evaluation

36595

The Community Foundation
Serving the Counties of Riverside and San Bernadino

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

EZShield™ Check Fraud Protection for Business

VOID VOID VOID

PAY * Twenty-Five Thousand and no/100 *

TO THE ORDER OF

McPherson Magnet Education Foundation
333 S. Prospect Ave.
Orange, CA 92869

DATE 12/18/2013

AMOUNT $****25,000.00

Celia Cardenas
Jonathan Lorenzo Yaba
AUTHORIZED SIGNATURE

Security features. Details on back.

⑈036595⑈ ⑆122234649⑆ 2441243 7⑈

The Community Foundation 36595

19253 McPherson Magnet Education Foundation 12/18/2013 036595

20130833	12/04/2013	An Apple for My iPod	25,000.00
GIMB		S.L. Gimbel Foundation Advised Fund	25,000.00

CHECK TOTAL: $****25,000.00

The Community Foundation 36595

19253 McPherson Magnet Education Foundation 12/18/2013 036595

20130833	12/04/2013	An Apple for My iPod	25,000.00
GIMB		S.L. Gimbel Foundation Advised Fund	25,000.00

CHECK TOTAL: $****25,000.00

PRODUCT SSLT111 USE WITH 91500 ENVELOPE PRINTED IN U.S.A. A