



# 2017 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:

Grant : 2010707

*GUARANTEE ID: 126*

## Organization / Agency Information

<b>Organization/Agency Name:</b> Olive Crest		
<b>Physical Address:</b> 555 Technology Court	<b>City/State/Zip:</b> Riverside, CA 92507	
<b>Mailing Address:</b> 2130 E. Fourth Street	<b>City/State/Zip:</b> Santa Ana, CA 92705	
<b>CEO or Director:</b> Donald Verleur	<b>Title:</b> CEO	
<b>Phone:</b> 714.543.5437	<b>Fax:</b> 714.543.5463	<b>Email:</b> Donald-verleur@olivecrest.org
<b>Contact Person:</b> Tracy Fitzsimmons		<b>Title:</b> Executive Director, Inland Empire
<b>Phone:</b> 951.686.8500	<b>Fax:</b> 951.369.3037	<b>Email:</b> tracy-fitzsimmons@olivecrest.org
<b>Web Site Address:</b> www.olivecrest.org		<b>Tax ID:</b> 95-2877102

## Program / Grant Information

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

<b>Program/Project Name:</b> Residential & Transitional Housing for Youth			<b>Amount of Grant Requested:</b> \$25,000
<b>Total Organization Budget: (FY 18)</b> \$53,802,168	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> 80.3%	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C/ Column A x 100):</b> 12.2%	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D/ Column A x 100):</b> 19.6%
<b>Purpose of Grant Request (one sentence):</b>  The purpose of this grant request is to seek funding to support housing, case management, and supportive service costs for 54 youth (aged 16-21) living in Olive Crest's residential and transitional housing for youth (teens, emancipating foster youth, and transitional-aged-youth) in the Counties of Riverside and San Bernardino.			
<b>Program Start Date (Month and Year):</b> July 1, 2017		<b>Program End Date (Month and Year):</b> June 30, 2018	
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b>  If awarded, this would be a first-time grant from the Gimbel Foundation to Olive Crest.			

## Signatures

<b>Board President / Chair: (Print name and Title)</b> Daniel Schlothman, Chairman of the Board	<b>Signature:</b> <i>[Signature]</i>	<b>Date:</b> 9-14-17
<b>Executive Director/President: (Print name and Title)</b> Donald Verleur, CEO	<b>Signature:</b> <i>[Signature]</i>	<b>Date:</b> 9/14/17

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

**I. Organization Background**

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

Olive Crest is dedicated to preventing child abuse, to treating and educating at-risk children, and to preserving the family... One Life at a Time.<sup>®</sup> Since our founding in 1973, Olive Crest has provided critical safety-net services to 100,000 abused, neglected, and at-risk children and families in California (including San Bernardino and Riverside Counties), Nevada, and Washington State. One of the leading providers of pathways to safety and hope for vulnerable young people in the USA, Olive Crest impacts the lives of more than 3,500 in-crisis children and youth *every day*. In 2018, Olive Crest celebrates 40 years of serving the Inland Empire area, providing evidence-based solutions and compassionate care to more than 1400 children, youth, and families annually.

Olive Crest is one of the only organizations in the Inland Empire that provides such a comprehensive continuum of care—including abuse prevention for children living in vulnerable families; children living in foster care or in residential/group homes; and young adults who have emancipated from foster care and who are working to become independent and self-sufficient.

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

Olive Crest programs consistently exceed national averages for key foster care outcomes in Safety, Well-Being, Stability, and Permanence, and meeting the highest national standards in delivering optimal services to the community. Recent accomplishments (as of 1/2017) for Olive Crest, Inland Empire Region, include: 84% of foster youth improved CAFAS scores from intake to closure, exceeding our functional improvement goal of 80%; 99.8% of foster youth were risk-free each month, exceeding our safety goal of 98.8%; 99.3% of foster care and residential youth had less than two placement moves, exceeding our stability goal of 95%.

Olive Crest is endorsed by the Council on Accreditation, the California Alliance of Children and Family Services, the Association of Children's Services Agencies of Southern California, and United Way. We have also received formal awards and recognitions, such as our partnership with Safe Families For Children, which earned the Peter F. Drucker Award for Non-Profit Innovation, the distinction of being called an Ashoka Fellow, and the privilege of forging research partnerships with the University of NC, Annie E. Casey Foundation.

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

A leading provider of services for vulnerable children, youth, and families throughout Riverside and San Bernardino Counties, Olive Crest, Inland and Desert Communities, the population served includes children and teens in foster care; children at-risk of needing child protective



service support and their families; youth emancipating from foster care; and transition-aged-youth. They range in age from 0–22 years of age, and have been victims of, or are at high risk for, physical, sexual, emotional abuse, and/or severe neglect. Many have disabilities in the form of developmental delay, emotional disturbance, and learning disabilities. Many are at a high risk of falling through traditional social service cracks and ending up homeless or living in extreme hardship.

Olive Crest’s programs are operated out of 15 scattered-site apartments, seven residential homes, and a Family Resource Center located throughout the region. Services include: temporary emergency housing and residential homes for children, teenagers, and transitional-age-youth; basic needs; foster family recruitment/training; foster care services; adoption placement/support; therapeutic educational services; education support; independent life skills and mentoring; workforce development; job placement support; counseling and mental health care; extended family support; and family crisis intervention and preservation services.

## **II. Project Information:**

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

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

There are more than 9,500 youth in California's Inland Empire foster care system. Each year, 800 foster youth turn 18 and “age out” of the system. Studies show that 65% of foster youth have no home after emancipation, 51% are unemployed, less than 3% attend college, and 71% of women are pregnant by age 21. While emancipated foster youth represent less than 1% of the state’s total population, 40% of people in homeless shelters are former foster kids, and nearly 14% of California's inmates said they had been in foster care at some point in their lives<sup>1</sup>.

While few 18-year-olds have all the skills to live independently, most foster youth, lack the financial, emotional, and social support that families typically provide. Many also have significant emotional and mental health issues that, left untreated, can affect their long-term chances of independence. As a result, one in five foster and former foster youth become homeless after age 18. This is a tragic statistic and one that Olive Crest is committed to changing. **Our Residential & Transitional Housing for Youth Program offers foster and former foster youth an alternative to homelessness and a chance to exchange these deplorable outcomes for better ones, so that they can grow to live successful, independent lives.**

**Olive Crest is requesting \$25,000 in financial support to cover costs for skills training to 110 of these current and former foster youth as well as scholarship dollars to support educational expenses for young women who excel within our Residential & Transitional Housing for Youth Program.**

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<sup>1</sup> California Department of Corrections and Rehabilitation and the California Senate Office of Research 2018

## **B) Project Description:**

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

Olive Crest's Residential & Transitional Housing for Youth Program provides safe, loving homes, education, tools for success, and family for life to teens who would otherwise be homeless. This program includes **The Ranch, a residential housing facility** for boys ages 14–17, located in Perris, California, and **transitional housing**, located throughout Riverside County, for 60 boys and girls, ages 18–21, who have emancipated from foster care. These young people have no families and many served are on probation, come from complicated backgrounds, and/or suffer from mental illness. Most would be homeless without Olive Crest's support.

Services address the practical, educational, mental health, and vocational needs of youth, including: housing assistance and basic necessities; case management and access to 24/7 support; mental health counseling; tutoring and educational assistance; college scholarships; independent living skills training; financial education; healthcare; transportation; and workforce development, including career training, subsidized work experience, and on-the-job training. Our professionally trained life skills coaches, licensed counselors, and case managers help youth set goals to attain their educational and career plans, monitor the progress of those goals, provide counseling to help heal from past trauma, and teach basic life and independent living skills. Volunteers from the community and local businesses train as mentors to meet with youth. Through these mentoring opportunities, youth are exposed to different career options such as nursing, banking, financial planning, etc. Activities ensure that youth build life skills, establish healthy relationships, secure safe, permanent housing, and become self-sufficient.

**Many of the young women in this program suffer from low self-esteem and, as studies show, are at high risk of unplanned pregnancies - with all the added stressors that this may bring. As added incentive to this population, educational scholarships will be made available for high-performing female participants of the program. Not only will this serve as motivation to aggressively pursue education beyond the high school level, but it will also provide a short-term success in order to build a path toward greater confidence.**

**By providing a safe environment, life skills, employment assistance, counseling, and case management, Olive Crest prevents homelessness among youth, prepares former foster youth for independent living, and helps them recognize their own capacity to contribute to their community as successful, independent citizens.**

## **C) Project Goal, Objective, Outcome & Evaluation:**

GOAL: Provide life skills classes to all foster youth (ages 14–22) in our Residential and Transitional Housing for Youth Program, empowering youth to break the cycle of abuse so that they may enter society as independent and self-sufficient individuals.



**OBJECTIVE:** Within one year of funding, we will provide a minimum of 40 hours of training to an estimated 110 foster youth in areas to include financial literacy, health and parenting, and career/vocational opportunities.

Service activities include: 24 unique **Independent Life Skills Classes** to cover a wide-range of essential topics to prepare youth for independence; 2 unique **Youth Empowerment Workshops** to provide youth with opportunities to interact with local social services, educational institutions, and community leaders for helpful resources; 2 unique **Financial Independence Training (FIT) Academies**, an intensive six-week course to teach budgeting and savings skills; ongoing **Mindset Matters** online training for youth on “Real World Safety” and other important lessons to learn for their well-being.

**OUTCOME:** Up to 110 foster youth will receive 40 hours of life skills training to prepare them for independence. These trainings will include a treatment plan for each participant with supportive mentoring and specified timelines for completion.

**EVALUATION:** Olive Crest utilizes the Child and Adolescent Functional Assessment Scale (CAFAS) and tracking system to assess, track, and measure outcomes for each client. Measureable outcomes include:

- 1) Safety/Risk: 109 (99%) of clients within this Olive Crest program will be risk-free each month;
- 2) Placement Stability: 107 (95%) of foster and residential clients will have one or less placement moves while in Olive Crest's care. By comparison, the national average on placement stability is 74.5%;
- 3) Permanency: 94 (85%) of the clients will successfully complete Olive Crest's programs being discharged to a permanent placement, or successfully graduating or transitioning to a lower level of care; By comparison, the national average on permanency is 72.75%.
- 4) Functional Improvement: 88 (80%) of clients will show improvement from intake to closure.
- 5) Completion of 40 hours skills training (minimum) for each of our 110 youth participants. This will be tracked through monthly reports from our ILS Coach for each participant in order to track specific trainings and the length of each on a rolling basis. These reports will be available upon request throughout the year and/or at the completion of the grant cycle.**

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

The Residential & Transitional Housing for Youth Program is offered on an ongoing basis, year-round. Life skills classes are planned and scheduled on a rolling basis to ensure that ALL participants will receive the same instruction. Our fiscal year ends June 30.

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

Those served each year include 60 young adults (ages 18–22) living in transitional housing, and 50 youth (aged 14–17) residing in residential housing facilities from the communities of Riverside and San Bernardino Counties. Many have experienced significant abuse, neglect, or abandonment. Most have spent years in the child welfare system. Without significant help, many of these children are at risk of falling into homelessness, or even incarceration.

**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?**

This is one of the only programs of its kind in the region. The only other organization offering comparable services is Aspire, but unlike Olive Crest, they do not offer the full continuum of care. Other partners, including University of Riverside, Cal. Baptist University and Riverside Community College along with the District Attorney’s office, local shelters, and county and city police and fire departments. Olive Crest, Inland Empire Region, engages 580 volunteers annually in fulfilling our mission, resulting in nearly \$60,000 in savings to our organization.

**G) Use of Grant Fund: How will you use the grant funds?**

Grant funding from the S. L. Gimbel Foundation of \$25,000 will be used to help cover costs of the Residential & Transitional Housing for Youth program—helping pay for life skills classes staffing, workshops, childcare and scholarships.

**Monies from the S.L. Gimbel Foundation will support costs of curriculum (\$8,500) and instruction (\$12,000) for 110 youth at a minimum of 40 hours each. This projects to \$186 per youth participant. In addition, \$2,000 of the funds will be used for quarterly group meetings for young women and teen girls and another \$2,500 will be used for the establishment of a scholarship program to support the educational costs of high performing participants in the program.**

**Olive Crest is pursuing/has secured funding from additional private sources in the amount of \$28,527 to cover the remaining costs of this project.**

### **III. Project Future**

**A) Sustainability: Explain how you will support this project after the grant performance period. Include plans for fundraising/increasing financial support designated for project.**

Olive Crest’s diversified funding plan will continue to secure funding from a diversified portfolio of funders after the grant performance period. Funding sources are outlined in financial materials attached.

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

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

Olive Crest, Inland Empire, is overseen by a 19-member Board of Trustees representing local business owners and philanthropic leaders, who assist in fundraising and awareness specifically for the Inland Empire area. A national Board of Directors of nine oversees the entire organization's finances and operations. Standing committees of the Board of Directors are: Finance Committee, Program Committee, and Fund Development Committee. An Ad Hoc Audit Committee is established each year to oversee the annual audit, as well. Committees make recommendations to the Board of Directors. The Board makes decisions at meetings where a quorum of the Board is present, and in exceptional instances by unanimous written consent.

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

David Harper, Program Director, Riverside, has been working at Olive Crest for 26 years. He has worked directly with at-risk youth in residential and transitional housing programs providing counseling, training, consultation, and leadership to children, families, and agencies throughout Orange, Riverside, and San Bernardino Counties. David is an Administrator through the state of California community Care Licensing, a volunteer of the Red Cross for more than 30 years and leads the National team for Olive Crest's residential and transitional programs.



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### 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.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Personnel: Salaries - ILS Coach & Resource Specialist	16 hrs/wk x \$18.85/hr x 52 weeks = \$15,683.20 PLUS 10 hrs/wk x \$17.50/hr x 52 weeks = \$9,100	\$ -	\$14,783	\$10,000	\$24,783
Benefits	\$24,783 X 21% = \$5,204	\$ -	\$3,204	\$2,000	\$5,204
Curriculum - Education & Youth Empowerment	For Education Materials with 3 curriculum x \$30/ea x 110 clients = \$9,900. For Youth Empowerment workbooks: \$35/each x 110 clients = \$3,850	\$ -	\$5,250	\$8,500	\$13,750
Young Women & Teen Girls Group Meetings (4)	2 groups (14-17) & (18-21) that meet quarterly - estimate \$20 per session for materials, books, handouts, supplies, etc. for 25 participants	\$ -	\$ -	\$2,000	\$2,000
Parent Empowerment Workshops	For Materials: \$35/ea x 110 clients = \$3,850	\$ -	\$3,850	\$ -	\$3,850
Single Mother Support Groups (12)	Avg. 12 mothers/mo x 12 mos x \$10/ea for minimal supplies and materials.	\$ -	\$1,440	\$ -	\$1,440
Childcare for Parent Workshops and Single Mother	Childcare for parent workshops at 7 hrs x 2/yr x 17 licensed	\$6,904	\$ -	\$ -	\$6,904



Support Groups	caregivers x \$24.14/hr = \$5,745.32 PLUS single mother support groups at 2 hrs x 12/yr x 2 licensed caregivers x \$24.14/hr = \$1,158.72.				
Facility Cost	Training Room Rental @ \$250/session for 20 sessions	\$5,000	\$ -	\$ -	\$5,000
Youth Scholarship(s)	1 \$2,500 or 2 \$1,250 scholarships	\$ -	\$ -	\$2,500	\$2,500
<b>TOTALS:</b>		\$11,904	\$28,527	\$25,000	\$65,431

**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

1. Personnel: The Independent Living Skills (ILS) Coach coordinates and manages the ILS classes and overall programs for transitional youth. The Resource Specialist identifies community-based connections and brings them to staff for program enrichment and aftercare opportunities.

1 ILS Coach at 16 hrs/wk x \$18.85/hr. x 52 wks. = \$15,683.20

1 Resource Specialist at 10 hrs/wk x \$17.50 x 52 wks. = \$9,100.00

2. Benefits: Includes payroll taxes, workers compensation and health insurance at 21% of salaries.

3. Curriculum - Education & Youth Empowerment materials: Education materials include 3 curriculums at \$30/ea x 110 clients. Youth Empowerment workbook is \$35/ea x 110 clients. Total of \$13,750 for materials. Curriculum includes "Bridges Out of Poverty" and Mindset Matters.

4. Young Women and Teen Girls Group Meetings: Materials for 25 young women (18-21 years) and teen girls (14-17 years) x 4 sessions x \$20/ea = \$2,000.

5. Parent Empowerment Workshops: Parent empowerment classes for 110 clients x \$35/ea for materials = \$3,850.

6. Single Mother Support Groups: Monthly meetings facilitated by Olive Crest staff for 12 mothers x 12 months x \$10/ea = \$1,440.

7. Childcare: For parent workshops, childcare is needed twice a year for 7 hours/ea x 17 licensed caregivers to maintain ratio of 6 children to 1 childcare attendant x \$24.14/hr = \$5,745.32. For single mother support groups, childcare is needed monthly for 2 hours/ea x 2 licensed caregivers x \$24.14/hr = \$1,158.72. Together, child costs are \$6,904 annually.

8. Facility Cost: Necessary for meeting space for bi-weekly Independent Life Skills classes

9. Scholarships: For young women excelling in an Olive Crest program and accepted to a college, university, technical trade school, or other accredited higher education institution. Scholarship will be paid directly to the school for tuition, books, supplies, or other educational expenses.

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

*Secured/Awarded for FY18, which began July 1, 2017*

Name of Funder: Foundation, Corporation, Government	Amount
Dart Foundation	\$5,000
Anderson Children's Foundation	\$30,000
San Manuel Band of Mission Indians (two-year grant)	\$200,000
Kaiser Permanente	\$25,000
Wells Fargo	\$10,000
Group Homes, Foster, & THP+FC - AFDC and California Dept. of Social Services	\$5,056,225
THP+ - California Dept. of Social Services	\$852,453
Mental Health - Medi-Cal	\$2,170,000
Wraparound - California Dept. of Social Services	\$2,965,512
PAARP - California Dept. of Social Services	\$550,000

*Pending funding for FY18*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Coeta and Donald Barker Foundation	\$10,000	November 1
Boeing Corporation	\$15,000	TBD
CAP Trust	\$25,000	November 1
Edison	\$5,000	December
US Bank	\$10,000	TBD
Desert Charities	\$10,000	August
Mentor Network	\$10,000	TBD
Bighorn Charities	\$9,100	August
Big Lots	\$5,000	TBD
In N Out Burger Foundation	\$12,000	December
Chick Fil A Foundation	\$20,000	November

*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	\$2,597,565	5%	Program Fees		
Fundraising/Special Events	\$1,629,935	3%	Interest Income	\$	
Corp/Foundation Grants	\$1,500,000	3%	Facilities:	\$566,893	2%
Government Grants	\$36,694,468	86%	Other:	\$289,556	1%

**Notes:** Other foundations we plan to apply to in fy18 include: Stebler Foundation, Seraphim Foundation, Walmart Foundation, Irene Rockwell, TJX, Trilogy La Quinta, Bank of America, Annenberg Foundation, and California Wellness Foundation.

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### VII. Financial Analysis

Agency Name: Olive Crest

Most Current Fiscal Year (Dates): From: 07/01/2015 To: 06/30/2016

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
\$38,096,768	\$28,855,520	\$5,718,038	\$3,523,210

**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
\$38,096,768	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
100%	76%	15%	9%

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

Percentage of Organization's Current Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
9%	9%	0%

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



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

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$6,910,053	\$4,973,086	\$3,455,312	3.44

**Excess or Deficit for the Year:**

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$750,940	\$756,886

**Notes:**

### **VIII. Application submission check list:**

<b>Submit FOUR (4) Copies: 1 ORIGINAL (WITH ORIGINAL SIGNATURES) and 3 copies, collated and stapled together of the following:</b>	<b>Submit ONE (1) Copy:</b>
Completed Grant Application Form (cover sheet, narrative), budget page and budget narrative (see sample) and sources of funding, financial analysis page	A copy of your current 501(c)(3) letter from the IRS
Your current operating budget and the previous year's actual expenses (see sample Budget Comparison)	A copy of your most recent year-end financial statements (audited if available; double-sided)
Part IX only of the 990 form, Statement of Functional Expenses (one page). If you completed a 990-EZ, fill out the attached Part IX, Functional Expenses of the 990 form using figures from your 990-EZ	A copy of your most recent 990 (double-sided)
For past grantees, a copy of your most recent final report.	A list of your Board members and their affiliations

**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 . . . . .	1,070,746	244,948	552,665	273,133
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 . . . . .	19,211,896	14,991,652	2,659,930	1,560,314
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) . . . . .				
9 Other employee benefits . . . . .	2,410,324	2,029,123	250,760	130,441
10 Payroll taxes . . . . .	1,477,906	1,174,044	190,516	113,346
11 Fees for services (non-employees):				
a Management . . . . .				
b Legal . . . . .				
c Accounting . . . . .				
d Lobbying . . . . .				
e Professional fundraising services. See Part IV, line 17 . . . . .				
f Investment management fees . . . . .				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.) . . . . .	2,021,660	878,037	494,282	649,341
12 Advertising and promotion . . . . .				
13 Office expenses . . . . .				
14 Information technology . . . . .				
15 Royalties . . . . .				
16 Occupancy . . . . .	2,322,122	1,722,412	523,916	75,794
17 Travel . . . . .				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .				
19 Conferences, conventions, and meetings . . . . .	268,370	98,349	86,020	84,001
20 Interest . . . . .	233,342	48,158	173,857	11,327
21 Payments to affiliates . . . . .				
22 Depreciation, depletion, and amortization . . . . .	699,403	395,850	289,001	14,552
23 Insurance . . . . .				
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>SERVICES AND SUPPLIES</u> . . . . .	6,342,875	5,575,320	235,263	532,292
b <u>TRANSPORTATION</u> . . . . .	1,098,456	1,028,039	48,715	21,702
c <u>UTILITIES AND TELEPHONE</u> . . . . .	939,668	669,588	213,113	56,967
d . . . . .				
e All other expenses . . . . .				
25 <b>Total functional expenses.</b> Add lines 1 through 24e . . . . .	38,096,768	28,855,520	5,718,038	3,523,210
26 <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> If following SOP 98-2 (ASC 958-720) . . . . .				

OLIVE CREST			
BUDGET COMPARISON			
	Actual FY 2017	Projected FY 2018	Variance
<b>Revenues</b>			
Contributions	4,189,362	5,136,532	(947,170)
Special Events	2,697,952	2,537,750	160,202
Gifts in Kind	966,129	0	966,129
Stock Donations		0	0
Public Funding	33,819,295	37,611,238	(3,791,943)
Government Appropriations		0	0
Gain/(Loss on Sale of Assets)	38,818	0	38,818
Other Revenue	1,463,235	990,495	472,740
<b>Total Revenues and Public Support</b>	<b>43,174,791</b>	<b>46,276,015</b>	<b>(3,101,224)</b>
<b>Expenses</b>			
Salaries and Wages	21,513,196	21,045,516	(467,680)
Payroll Taxes and Benefits	3,947,527	4,215,785	268,258
<b>Total Salaries and Benefits</b>	<b>25,460,723</b>	<b>25,261,301</b>	<b>(199,422)</b>
Professional Fees	2,076,148	916,519	(1,159,629)
Office Administration	1,578,637	877,654	(700,983)
Utilities and Telephone	1,035,977	880,582	(155,395)
Facilities	2,661,622	2,486,477	(175,145)
Transportation	1,186,615	1,150,417	(36,198)
Client Services	6,391,317	6,952,345	561,028
Interest	261,826	68,969	(192,857)
Depreciation	706,946	462,990	(243,956)
Regional Direct Administration		0	0
Other Expense	383,779	1,174,479	790,700
Special Events	913,895	696,800	(217,095)
<b>Subtotal</b>	<b>42,657,485</b>	<b>40,928,533</b>	<b>(1,728,952)</b>
<b>Direct Margin</b>	<b>517,306</b>	<b>5,347,482</b>	<b>(4,830,176)</b>
G&A / Indirect Costs	(615,244)	2,836,561	3,451,805
Development Allocation	0	806,760	806,760
Gifts-in-Kind	900,201	0	(900,201)
<b>Total Expenses</b>	<b>42,942,442</b>	<b>44,571,854</b>	<b>1,629,412</b>
Surplus / <Deficit> before Restricted Donations	232,349	1,704,161	(1,471,812)
Restricted Donations to Affiliates (Program)	(9,832)	(933,610)	923,778
<b>Surplus / &lt;Deficit&gt;</b>	<b>222,517</b>	<b>770,551</b>	<b>(548,034)</b>





Strengthening Inland Southern California through Philanthropy

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October 23, 2017

*S. L. Gimbel Foundation Fund*

Ms. Tracy Fitzsimmons  
ED of IE and Desert Communities  
Olive Crest  
555 Technology Court, Suite 300  
Santa Ana, CA 92705

Dear Ms. Fitzsimmons:

Congratulations! A grant has been approved for **Olive Crest** in the amount of **\$25,000.00** from the S.L. Gimbel Foundation. **The performance period for this grant is November 1, 2017 to November 30, 2018.** Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

*Residential and Transitional Housing for Youth*

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, **please sign and date the agreement and return with original signature to The Community Foundation by Thursday, November 30, 2017.** Be sure to copy the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

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

<https://www.thecommunityfoundation.net/grants/grants/forms>.

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

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

126 Olive Crest

20170707 GIMB





Strengthening Inland Southern California through Philanthropy

3700 Sixth Street, Suite 200

Riverside, CA 92501

P: 951-684-4194

F: 951-684-1911

[www.thecommunityfoundation.net](http://www.thecommunityfoundation.net)

## S. L. Gimbel Foundation Fund Grant Agreement

**Organization:** Olive Crest

**Grant Amount:** \$25,000.00

**Grant Number:** 20170707

**Grant Period:** November 1, 2017 to November 30, 2018 (Evaluation Due: December 15, 2018)

**Purpose:** Residential and Transitional Housing for Youth

### 1. Use of Grant Funds

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

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

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

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

### 2. Payment of Grant Funds

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

### 3. Certification and Maintenance of Exempt Organization Status

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

### 4. Final Report and Records

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

### 5. Grantee's Financial Responsibilities

Grantee will keep records of receipts and expenditures of grant funds and other supporting documentation related to the grant at least four (4) years after completion of the grant and will make such records of receipts, expenditures and supporting documentation available to the Foundation upon request, for the purpose of conducting financial audits, making verifications, and investigations as deemed necessary concerning the grant.



## 6. Publicity

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

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

## 7. Indemnification

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

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

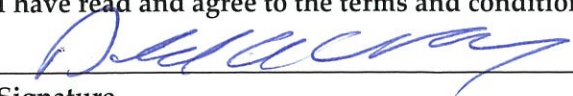
## 8. Termination

The Community Foundation may terminate this agreement, modify or withhold payments under this grant award, require a total or partial refund of any grant funds, or all at any time, if, in the Community Foundation's judgment: a) The Community Foundation is not satisfied with the quality of the Grantee's progress toward achieving the project goals and objectives; b) the Grantee dissolves or fails to operate; c) the Grantee fails to comply with the terms and conditions of this agreement; d) the Grantee fails to comply with the requirements of any law or regulation applicable to you, the Foundation, or this grant.

## 9. Limitation of Support

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

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

  
Signature

DONALD A. VERLEUR  
Printed Name

11-15-17  
Date

CEO  
Title

Organization: Olive Crest

Grant Number: 20170707

AV  
11/20/17

11/20/17





Strengthening Inland Southern California through Philanthropy

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Paula Myles  
Interim President and CEO

November 30, 2017

S. L. Gimbel Foundation Fund

Ms. Tracy Fitzsimmons  
ED of IE and Desert Communities  
Olive Crest  
555 Technology Court, Suite 300  
Santa Ana, CA 92705

Dear Ms. Fitzsimmons:

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, 2018** and will be available online on The Community Foundations website under: <https://www.thecommunityfoundation.net/grants/grants/forms>. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

We greatly appreciate any help you can give us in publicizing the grant. Please use the following credit in any grant announcements or materials funded by the grant: *"Olive Crest is supported by a grant from The S. L. Gimbel Foundation."* You may send us copies of articles printed in local papers, stories in your agency newsletter, annual report, press releases, and other publications for our files.

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

Sincerely,

Celia Cudiamat

Executive Vice President of Programs

20170707

43328

GIMB-3



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

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43328

PAY \* Twenty-Five Thousand and no/100 \*

TO THE  
ORDER OF

DATE

11/28/2017

AMOUNT

\$ \*\*\*\*25,000.00

Olive Crest  
555 Technology Court, Suite 300  
Santa Ana, CA 92705

*[Signature]*  
AUTHORIZED SIGNATURE

⑈043328⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

126 Olive Crest

11/28/2017 043328

43328

20170707	11/21/2017	Residential and Transitional Housing for Youth	25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		25,000.00

CHECK TOTAL: \$ \*\*\*\*25,000.00

The Community Foundation

126 Olive Crest

11/28/2017 043328

43328

20170707	11/21/2017	Residential and Transitional Housing for Youth	25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		25,000.00

CHECK TOTAL: \$ \*\*\*\*25,000.00