



## 2016 S.L. Gimbel Foundation Fund Grant Application

#42,500

Internal Use Only:  
 Grant No. : 20160261  
 GRANTEE I.D.: 22489

### Organization / Agency Information

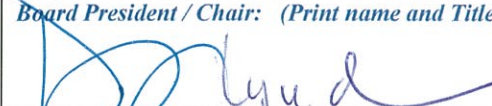

<b>Organization/Agency Name:</b> Planned Parenthood: Santa Barbara, Ventura, San Luis Obispo Counties		
<b>Physical Address:</b> 518 Garden Street		<b>City/State/Zip</b> Santa Barbara, CA 93101
<b>Mailing Address:</b> 518 Garden Street		Santa Barbara, CA 93101
<b>CEO or Director:</b> Jenna Tosh, Ph.D.		<b>Title:</b> President & CEO
<b>Phone:</b> 805-722-1505	<b>Fax:</b> 805.965.2292	<b>Email:</b> Jenna.tosh@ppsbvslo.org
<b>Contact Person:</b> Catelynn Kenner		<b>Title:</b> Grant Writer
<b>Phone:</b> 805-722-1537	<b>Fax:</b> 805.965.2292	<b>Email:</b> Catelynn.kenner@ppsbvslo.org
<b>Web Site Address:</b> www.ppsbvlslo.org		<b>Tax ID:</b> 95-2319356

### Program / Grant Information

**Interest Area:** Health

<b>Program/Project Name:</b> PPSBVSLO Internal Capacity Building and Education Extension		<b>Amount of Grant Requested:</b> \$42,500	
<b>Total Organization Budget:</b> \$15,458,872	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> 79.9%	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C/ Column A x 100):</b> 16.7%	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b> 3.4%
<b>Purpose of Grant Request (one sentence):</b> In order to meet the growing need of our community to be educated on protecting themselves and their partners from rising STI and teen pregnancy rates, Planned Parenthood aims to expand the staff capacity of our Education Department and extend our services to participants long after we have left their classroom through the innovative, textline service "ICYC" ("In Case You're Curious").			
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> N/A			

### Signatures

<b>Board President / Chair:</b> (Print name and Title) 	<b>Signature:</b> DEBORAH LYNCH	<b>Date:</b> 2/18/16
<b>Executive Director/President:</b> (Print name and Title) 	<b>Signature:</b> Jenna Tosh, CEO	<b>Date:</b> 2/17/16

**I. Organization Background and Target Population:** Established as a California, tax-exempt nonprofit corporation in 1964, Planned Parenthood of Santa Barbara, Ventura & San Luis Obispo Counties' ("Planned Parenthood") mission is: to promote the ability of all individuals to lead fulfilled lives, build healthy families and make informed decisions through high-quality health services, education and advocacy. As an accredited affiliate of Planned Parenthood Federation of America, we meet our mission through: Clinical Services, Community Education & Advocacy. We respond to the evolving needs of patients and have expanded to serve a larger patient population. In recent years, we have concentrated on increasing participation by male patients; in the past decade we have doubled the percentage of male patients (6% -12%). Other recent achievements have been the 2014 successful transition to Electronic Health Records and to ICD 10 diagnostic coding in 2015. Our five health centers (Thousand Oaks, Ventura, Santa Barbara, Santa Maria, San Luis Obispo) are licensed by the State to meet the highest, national standards for accreditation and Title X. In 2014-15, 34,259 unduplicated men, women & teens were served and over 90% reported incomes at 200% of or below the federal poverty level. People of color comprised a majority of our patients (56%), identifying as: 45% Latino, 6% Multi-racial / Other, 4% Asian/Pacific Islander, 1% African American, <1% Native American. Throughout the community, we have presented comprehensive sexual health education since the 1980's. In Ventura County & Santa Maria, our bilingual, bicultural health educators implement culturally-competent peer education programs: *Amigo(a) á Amigo(a)* and *Promotores(as) Comunitarios(as)*, serving Latino adults, many whom are farmworkers. Planned Parenthood partners with schools (junior high through college), after-school programs, community centers, probation agencies, recovery programs, and housing complexes for low-income residents. The majority of our education program participants, and target population for this grant, are from low-income families, identify as Latino/a (54% in 2014-5) and are 14-19 years old.

**II. Project Information: A: Statement of Need-** Santa Barbara & Ventura Counties have higher than average teen birth rates and increasing STI rates, disproportionately impacting low-income Latinos. Like other Californian counties with major agricultural, hospitality, and tourism sectors, average household income levels cloak dramatic inequality. Many recent immigrants living in rural poverty with limited English language proficiency are unaware they are eligible for high-quality, low-cost reproductive healthcare. Promoting and offering culturally and linguistically-appropriate comprehensive sexual and reproductive health services and education continues to be a priority. Despite teen birth rates trending downward since 2007, Santa Barbara's birth rate among 15-19 year olds remains higher than state average (CDPH 2013). Alarming, in 2013, the Santa Barbara County teen birth rate to Hispanic/Latina teens age 15-19 was 47.9 per 1,000, compared to 4.1 per 1,000 for White teens (SBCPHD 2013). In Ventura County, declines in teen birth rates have stagnated and from 2004-2011, over 85% of teen births were to Hispanic/Latina teens (VCPHD 2014). Moreover, adolescent STI rates in Santa Barbara & Ventura Counties have been increasing dramatically past state averages and is highest among 17-24 year-olds (SBPHD 2015, VCPHD 2015). Ventura County gonorrhea and HIV rates have also increased steeply while syphilis rates are rising in both counties (VCPHD 2015). Ventura County syphilis rates more than doubled from 2013- 2014 and now exceed the state average while rates in Santa Barbara County tripled (SBPHD 2015, VCPHD 2015). Fortunately, Planned Parenthood has engaged, extensive educational partners asking our staff to educate young people about safe sex. Unfortunately, we are not in a position financially to expand the number of staff to meet rising educational demand for services, nor to evaluate our programs. Moreover, many of

our sex health education presentations are one-time events or, at most, 6-day events. After that, participants may be left without reliable, accessible resources to answer sex health questions.

**B: Project Goals, Objectives, and Methodology-** Planned Parenthood proposes to enhance internal capacity and extend our reach to educate youth, ages 13-18, in Santa Barbara and Ventura Counties. Our goal is to meet the growing community need to educate young people, ensuring they can protect themselves and their partners from rising risks of STIs and teen pregnancy. We will do this by expanding our Education Department staff and offering the innovative service ICYC (“In Case You’re Curious”). ICYC provides anonymous and ongoing education via mobile texting, managed by the Responsible Sex Education Institute. Participants will be able to get sexual health and relationship questions answered long after educational programming ends. According to the Pew Research Center, 14-17 year-old girls typically send 100 or more messages daily. We meet teens where they are while normalizing conversations around sex and sexuality, disseminating medically-accurate information, and referring them to nearby Planned Parenthoods. While evidence-based programming occurs in our region through community organizations, our uniquely text-based educational enhancement service is not replicated elsewhere among the Tri-Counties. Additionally, many of our peers working in Santa Barbara County focus efforts in the north (extending out of San Luis Obispo County) while we plan to expand in the south, and fill geographic gaps in Ventura County, specifically Oxnard.

**Objectives:**

**I:** Employ a 0.5 FTE Health Educator, by July 2016, to implement evidence-based programming for 110 youth in Santa Barbara County and 65 youth in Ventura County

Activities: (See Table 1 for specific activities for this objective, containing “HE”)

**II:** Hire a 0.25 FTE Program Evaluator, by July 2016, to monitor and evaluate evidence-based educational programming and ICYC textline service through July 2017.

Activities: (See Table 1 for specific activities for this objective, containing “PE.”)

**III:** Subscribe, by July 2016, to the anonymous, textline service “ICYC”

Activities: (See Table 1 for specific activities for this objective, containing “ICYC.”)

**TABLE 1: Project Timeline and Activities**

<p><b>Quarter 1:</b> 06/01/16-08/31/16</p>	<p><b>Start Up Activities:</b> Recruit Health Educator (HE) via online ad placements (LinkedIn, CraigsList, Indeed) Hire and train HE at one of the Planned Parenthood orientations offered monthly Train HE on evidence-based curriculum through ETR Associates Fund current staff member with evaluation expertise as internal Program Evaluator (PE) PE designs Monitoring &amp; Evaluation (M&amp;E) efforts for programming &amp; ICYC Secure subscription to ICYC text service</p>
<p><b>Quarters 2-4:</b> (09/01/16 - 07/31/17)</p>	<p><b>Ongoing Activities (Q2-Q4):</b> HE participates in community meetings, events, health fairs &amp; conferences to continue partnering &amp; coordinating efforts with organizations serving high-risk youth and disseminate information about education &amp; health services HE offers orientation sessions quarterly for guardians of youth participants HE implements programming with community partners (as outlined below) PE trains HE on collecting and sending data for M&amp;E initiatives HE collects M&amp;E data and sends it to PE for analysis</p>

	PE analyzes M&E data and makes recommendations for program implementation HE promotes ICYC via social media- primarily Facebook- and in-person PE evaluates monthly ICYC metrics <b>Quarter 4 Activities:</b> PE augments outcome evaluation efforts from partners to guide future programming
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Through community relationship-building in our first-year, we will expand to reach approximately 15% more teens in future years. Through ten community partnerships during the grant cycle, one professional Health Educator (no volunteers will be utilized) will reach at least 110 teens in Santa Barbara County (though we have defined a way to reach 145, if all students participate) and at least 65 teens in Ventura County:

**TABLE 2: Santa Barbara and Ventura Counties’ Partner Commitments**

Partner	Commitment
Santa Barbara School of Squash	20 Participants- Cycle 1
Housing Authority of the City of Santa Barbara	10 Participants - Cycle 1 15 Participants- Cycle 2
CADA – YSS Program (DPHS& La Cuesta)	10 Participants – Cycle 1 (DPHS) 10 Participants – Cycle 2 (DPHS) 10 Participants – Cycle 1 (La Cuesta) 10 Participants – Cycle 2 (La Cuesta)
Future Leaders of America	15 Participants- Cycle 1
Girls Incorporated of Carpinteria	10 Participants- Cycle 1 10 Participants- Cycle 2
CADA – Daniel Bryant Youth and Family	7 Participants – Cycle 1 8 Participants – Cycle 2
One Step a la Vez (Fillmore)	10 Participants - Cycle 1
Future Leaders of America (Oxnard)	15 Participants - Cycle 1
Ventura County Probation Agency	10 Participants - Cycle 1 10 Participants - Cycle 2
Mixteco/Indigena Community Organizing Project- Tequio Youth Group (Oxnard)	10 Participants - Cycle 1
Casa Pacifica Centers for Children and Families	10 Participants - Cycle 1

**C: Project Outcomes and Evaluation-** Evaluation of the evidence-based programs will include process evaluation for evidence-based curricula and outcome evaluation for ICYC. Because our evidence-based program *Be Proud! Be Responsible! (BPBR)* has been previously evaluated for outcome and impact, we will focus on evaluation strategies assessing how closely we adhere to the model. Research shows that, as a result of participating in *BPBR* teens report: fewer days of having sex, fewer days of sex without a condom, and fewer sex partners who have other partners; we expect to replicate these programmatic outcomes. The Project Evaluator (PE) will design and analyze all monitoring and evaluation (M&E) efforts while the Health Educator (HE) will implement data collection. The PE will be responsible for: instrument design and development, implementation fidelity, data management and analysis, continuous development of quality improvement protocols, and developing effective tools for reporting evaluation data. She will participate fully in all funder-specified M&E and reporting activities. Outcomes will be tracked via sign-in sheets, formal and informal feedback gaging participants’ satisfaction, and paper, mixed-method surveys capturing demographic data and changes in knowledge, behaviors, and

values/attitudes. These indicators gauge our success in achieving high participation, satisfaction levels, and knowledge increase. In-person outreach and educational activities will be tracked utilizing our Excel-based Education & Outreach Tracking System; data will be analyzed monthly by the PE. Social media outreach activities, by the HE, will be tracked through monthly metrics from Planned Parenthood's web property ad account with Facebook. These reports will show how many "impressions" (number of times ad is displayed) and "click throughs" (number of times a viewer clicks the link to learn more) were received. Data will be aggregated by the HE and analyzed and reported by the PE. ICYC will be evaluated via monthly reports tracking: incoming texts and questions, total interactions, unique participants, new texters, outgoing texts by ICYC, average interactions per participant, common area codes, response by topic, and referrals to health centers.

**D: Funding-** We are requesting \$42,500 for: wages for a 0.5 FTE Health Educator (\$22,869); wages for a 0.25 FTE program evaluator (\$13,000); and funds for "ICYC" textline service and promotion (\$6,631). An ICYC subscription costs \$500 each month; over a year it will cost \$6,000. Additionally, there is a \$500 start-up fee and we will promote the new service using social media (Twitter and Facebook) and print media (flyers at our health centers) for \$500 total; we ask for partial funds supporting promotion.

**III. Project Future:** Because our service area is not metropolitan, we lack many large, local, private foundations. Your support would help us implement our first evidence-based program so that we will be eligible to apply for future government funding. Federal funds are available for evidenced-based programs in sexual health education and we plan to apply once we have completely transitioned into evidence-based programming (by December 2016). We are currently connected to local foundation funders who have regularly supported our education programs for years with grants ranging from \$5,000-\$25,000.

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

**Board:** Our organization is led by a diverse, local, independent board of directors of 23 representatives from across the three counties we serve. They meet every other month and are responsible for governance, business operations, and fundraising to sustain our annual operating budget. Our board committees include: Audit, Development, Executive, Governance, Finance, Nominating, & Healthcare Innovation Advisory groups. Each makes recommendations, which are then reviewed and approved by the full board. All board members are required to make personally significant contributions, and to raise funds through identifying prospective donors, attending events and serving as advocates. In fiscal year 2014-2015 we had 100% board giving, which we expect to repeat this year. **Staff:** Our President & CEO, Jenna Tosh, PhD, has past success fundraising for evidence-based teen pregnancy prevention programs. While serving as the President and CEO, and in a prior position as Director of Education for Planned Parenthood of Greater Orlando, Dr. Tosh led a collaborative initiative supported by the U.S. Department of Health and Human Services, and will support us in applying for that funding in 2020, Anna Lopez, Education Director, will lead recruiting and hiring a culturally-competent, passionate, and knowledgeable Health Educator. Our Program Evaluator will be Catelynn Kenner, a part-time Grant Writer for Planned Parenthood, who holds her Master of Public Health from Emory University concentrating in Health Education. As an experienced Sexual Health Educator and Program Evaluator, Catelynn will lead monitoring, evaluation, and reporting efforts.

# 2016 S.L. Gimbel Foundation Fund APPLICATION

## Narrative

**I. Organization Background; Target Population:**

**II. Project Information:**

**III. Project Future**

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

Please see Attached Narrative for Application Parts I-IV

**V. Project Budget and Narrative**

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Wages for Health Educator	\$21.99/hr x 20 hours/week x 52 weeks = \$22,869	\$0	\$0	\$22,869	\$22,869
Wages for Program Evaluator	\$25.00/hr x 10 hours/week x 52 weeks = \$13,000	\$0	\$0	\$13,000	\$13,000
ICYC ("In Case You're Curious") Textline Service	\$500 startup fee + \$6,000 in monthly subscription fees (\$500 monthly *12 months) + \$500 for initial service promotion	\$369	\$0	\$6,631	\$7,000
<i>Be Proud! Be Responsible!</i> Curriculum	(1 curriculum at 499.99 each + shipping @ \$50 + sales tax @ \$37.50) <i>Includes:</i> Curriculum, Activity Set, Curriculum DVDs, 30 student workbooks	\$0	\$587	\$0	\$587
Facilitator Training- <i>Be Proud! Be Responsible!</i>	Includes: 1800/trainee @ 3 trainees (Per quote by curriculum developers), Includes: registration and travel expenses	\$0	\$5,400	\$0	\$5,400
New Hire Recruitment	Internal (ex: Staff Time) and External Costs (Ex: Ad Placement) at 5% of salary	\$2,287			\$2,287
Payroll Tax Expense	Payroll taxes associated w/ Health	\$2,511	\$2,511	\$0	\$2,511

	Educator and Project Evaluator wages (7%)				
Technology for Presentations	Projector with Bag and Stand, Clicker, Laptop and Bag, Mouse, Speakers = 1370 + Verizon Hot Spot Wifi card at (40/month * 12 months) = 480	\$0	\$1,850	\$0	\$1,850
Office Supplies	pens, paper, poster-size Post-It notes, markers, tape, index cards	\$0	\$300	\$0	\$300
General Office Support	320/month * 12 months (print, copy, fax)	\$3,840	\$0	\$0	\$3,840
Mileage and Parking for Facilitators	Reimbursement rate: 0.525/mile, Estimate: 300/month * 12 months	\$3,600	\$0	\$0	\$3,600
<b>TOTALS:</b>		\$12,607	\$10,648	\$42,500	\$66,394

### **Budget Narrative**

#### **1. Wages for Health Educator (0.5 FTE)**

- Duties: implement programming with community partners, collaborate with community partners to offer orientation sessions quarterly for guardians of youth participants, participate in community meetings, events, health fairs & conferences to continue partnering & coordinating efforts with organizations serving high-risk youth, disseminate information & request feedback about our education & reproductive health services via social media & at community events, collect evaluation data and reports it to Project Evaluator for analysis
- Cost: \$21.99/hr x 20 hours/week x 52 weeks = \$22,869

#### **2. Wages for Program Evaluator (0.25 FTE)**

- Duties: designs and analyzes Monitoring & Evaluation initiatives for programming & ICYC, evaluates monthly ICYC metrics, makes recommendations for program implementation
- Cost: \$25.00/hr x 10 hours/week x 52 weeks = \$13,000

#### **3. ICYC (“In Case You’re Curious”) Textline Service**

- Description: ICYC provides anonymous, ongoing education about sex and sexuality via mobile texting



- Cost: \$500 startup fee + \$6,000 in monthly subscription fees (\$500 monthly \*12 months) + \$500 for initial service promotion

**VI. Sources of Funding: Fiscal Year 2015-2016 (Year to Date)**

*Secured/Awarded*

<b>Name of Funder: Foundation, Corporation, Government</b>	<b>Amount</b>
Santa Barbara Foundation -TCBB Fund	\$ 10,000
Venoco Community Partnerships	\$ 5,000
Patagonia Foundation	\$ 12,000
CFHC Integration Project Grant	\$ 25,000
Blue Shield of California Foundation	\$ 10,500
Towbes Foundation	\$ 15,000
VCCF Women's Legacy Fund	\$ 7,500
Wood-Claeyssens Foundation	\$ 10,000
Neil Foundation	\$ 2,600
Latkin Family Foundation	\$ 2,000
Outhwaite Foundation	\$ 5,000
Crawford-Idema Foundation	\$ 20,000
Jewett Foundation	\$ 15,000
Planned Parenthood Federation of America -Latino Community Investment	\$ 1,255
Thomson Foundation	\$ 30,000
Weingart Foundation	\$ 300,000

*Pending*

<b>Name of Funder: Foundation, Corporation, Government</b>	<b>Amount</b>	<b>Decision Date</b>
California Department of Public Health - Information & Education Grant	\$240,000	02/29/2016
Bialis Foundation	\$5,000	03/31/2016
California Family Health Council - Title X	\$369,000	02/29/2016
Livingston Memorial Foundation	\$7,500	5/15/2016
City of Santa Barbara – Community Development Building Grant	\$10,000	03/01/2016
California Department of Public Health - HIV PrEP Grant	\$52,760	03/03/2016

**Diversity of Funding Sources:**

<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>	<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>
Contributions	\$687,784		Program Fees	\$0	
Fundraising/Special Events	\$304,804		Interest Income	\$ 246,764	
Corp/Foundation Grants	\$313,732		Other:	\$	
Government Grants	\$376,709		Other:	\$	

**VII. Financial Analysis**



Agency Name: Planned Parenthood of Santa Barbara, Ventura, San Luis Obispo Counties  
 Most Current Fiscal Year (Dates): From 07/01/2014 To: 06/30/2015

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

1.)

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$15,458,872 ✓	\$12,352,010 ✓	\$2,584,321 ✓	\$522,541 ✓

2.)

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	79.9% ✓	16.7% ✓	3.4% ✓

3.)

Percentage of Organization's Current Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
16%	16.7%	0.7 %

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

**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
\$6,023,836	\$1,380,554	3,585,565	2.06

**Excess or Deficit for the Year:**

Excess or (Deficit) Most recent fiscal year end (FY15)	Excess or (Deficit) Prior fiscal year end (FY14)
(1,590,482)	1,387,571

**Notes:** Please note stock market fluctuations can cause marked differences in financial statements from year to year.

## Board of Directors/Governing Body

**Organization:** Planned Parenthood of Santa Barbara, Ventura and SLO Counties

How often does the Board/Governing Body meet? Every 2 months, or more frequently, if needed.

Name	City	Affiliation/Profession	Board Position	Years of Service
The Rev. Mark Asman	Santa Barbara	Retired Clergy - Trinity Episcopal Church	Director	12
Madhu Bajaj	Ventura	Community Activist/Volunteer	Director	1
Jeannette Bauer	Newbury Park	Community Activist/Volunteer	Director	9
Leslie Bhutani	Santa Barbara	Community Activist/Volunteer	Director	5
Sue Ehrlich	Santa Barbara	Retired- SBCC V.P. of Human Resources	Director	8
Karen Engberg, MD	Santa Barbara	Managing Partner - Medical Practice	Vice Chair	7
Lisa Giegerich	Santa Barbara	Systems Engineer	Director	11
Richard W. Jensen	Santa Barbara	Retired - UCSB Administrator	Treasurer	27
Kirstin Kirby	Santa Barbara	Certified Public Accountant	Director	1
Tatiana Lawler	Camarillo	Former Planned Parenthood Staff/Educator	Director	1
Barbara Lindemann	Santa Barbara	Retired - Professor	Director (Ex-Officio)	1
Deborah Longstaff Lynch	Santa Barbara	Retired Attorney	Chair	6
Zahra Nahar-Moore	Santa Barbara	Nonprofit Consultant	Director	1
Mary Olson	Moorpark	General Manager of KCLU Radio	Director	3
Jennifer Randall	San Luis Obispo	Artist and Volunteer	Director	4
Richard Saenz	San Luis Obispo	Retired - Cal Poly Professor	Director	5
Ayesha Shaikh, MD	Santa Barbara	M.D. - Gynecologist	Secretary	3
Bob Shapiro	Goleta	Retired - County Administrator	Director	22
Julia Springer	Santa Barbara	Retired - President/Owner of SBC Assoc.	Director	12
The Rev. Dr. Betty Stapleford	Thousand Oaks	Retired Clergy -Unitarian Universal Church	Director	6
Elizabeth Vogt	Santa Barbara	Attorney	Director	1
Lucinda Young	Santa Barbara	Controller & Certified Public Accountant	Director	5

## Organization Annual Budget

Organization name:

Planned Parenthood of Santa Barbara, Ventura and San Luis Obispo Counties

Fiscal Year Dates: 7/1/2015-6/30/2016 (From Operations)

### INCOME

Source	Prior Year's Actual 6/30/2015 Audited	Current Year Annual Budget (\$)
Unrestricted Donations	\$ 1,105,561	\$ 1,038,000
Restricted Donations	\$ 244,865	\$ 125,000
Special Events	\$ 304,804	\$ 435,000
Title X & Government Grants	\$ 376,709	\$ 369,000
Patient Revenues	\$ 11,790,717	\$ 11,783,934
Donated Services	\$ 33,388	\$ 213,000
Investment Income	\$ 32,320	\$ 494,250
Patient Donations	\$ 73,198	\$ 100,000
Other, miscellaneous	\$ (166,330)	\$ 187,001
<b>TOTAL INCOME</b>	<b>\$ 13,795,232</b>	<b>\$ 14,745,185</b>

### EXPENSES

Item	Prior Year's Actual (\$) 6/30/2015 Audited	Current Year Annual Budget (\$)
Salaries and Benefits	\$ 8,382,852	\$ 8,724,798
Professional Services	\$ 388,486	\$ 917,376
Supplies (Medical and lab)	\$ 3,480,267	\$ 2,879,900
Insurance (Prop., Malpractice)	\$ 186,229	\$ 182,570
Mileage, Conf. and Travel	\$ 178,385	\$ 140,400
Marketing (Printing & Ads)	\$ 119,980	\$ 135,700
Rents	\$ 27,156	\$ 26,029
Mailing, Postage & Shipping	\$ 25,146	\$ 50,000
Facilities, Utilities and Maint.	\$ 875,175	\$ 561,562
Depreciation	\$ 895,410	\$ 828,000
Payments to Affiliates	\$ 258,992	\$ 279,750
Other	\$ 567,636	\$ 784,670
<b>TOTAL EXPENSES</b>	<b>\$ 15,385,714</b>	<b>\$ 15,510,755</b>
<b>NET PROFIT OR LOSS</b>	<b>\$ (1,590,482)</b>	<b>\$ (765,570)</b>

#### **Explanatory notes:**

The Prior Fiscal Year's Actual is based on our 2014-2015 Audit. Other, miscellaneous income includes FY15 loss in investment value. We are on track with plans to reduce our net loss to \$350,000 in FY17 and meet the budget in FY18.

The "Other" line items combined in the above expense line include: Membership Dues and Licenses, Bank Fees, Interest Expenses, Training and The Patient Assistance Fund (subsidized patient care).

PLANNED PARENTHOOD OF SANTA BARBARA,  
VENTURA, & SAN LUIS OBISPO COUNTIES, INC

Form 990 (2014)

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**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

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>				
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	46,598.	46,598.		
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	890,167.	712,134.	133,525.	44,508.
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	5,957,304.	4,685,831.	1,008,017.	263,456.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	249,219.	192,990.	45,459.	10,770.
9 Other employee benefits	850,763.	658,814.	155,184.	36,765.
10 Payroll taxes	435,399.	351,380.	66,071.	17,948.
11 Fees for services (non-employees):				
a Management				
b Legal	22,357.		22,357.	
c Accounting	45,523.		45,523.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	73,158.		73,158.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	433,859.	253,918.	179,941.	
12 Advertising and promotion	78,352.	14,469.	60,215.	3,668.
13 Office expenses	162,295.	98,096.	62,256.	1,943.
14 Information technology				
15 Royalties				
16 Occupancy	425,049.	264,267.	146,071.	14,711.
17 Travel	106,011.	90,108.	8,736.	7,167.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	72,384.	41,649.	23,937.	6,798.
20 Interest				
21 Payments to affiliates	212,394.	10,556.	201,838.	
22 Depreciation, depletion, and amortization	895,410.	765,523.	99,809.	30,078.
23 Insurance	126,941.	126,941.		
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 <b>MEDICAL SUPPLIES</b>	2,492,541.	2,492,541.		
b <b>LABORATORY FEES</b>	919,846.	919,846.		
c <b>EQUIPMENT REPAIRS &amp; MAINTENANCE</b>	314,197.	234,140.	56,200.	23,857.
d <b>PROPERTY REPAIRS &amp; MAINTENANCE</b>	225,072.	168,767.	54,467.	1,838.
e All other expenses	424,033.	223,442.	141,557.	59,034.
<b>25 Total functional expenses. Add lines 1 through 24e</b>	<b>15,458,872.</b>	<b>12,352,010.</b>	<b>2,584,321.</b>	<b>522,541.</b>
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)



Strengthening Inland Southern California through Philanthropy



BOARD OF DIRECTORS

May 27, 2016

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Randall Tagami

Diane Valenzuela

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms. Jenna Tosh, Ph.D.

President & CEO

Planned Parenthood Santa Barbara, Ventura, San Luis Obispo Counties

518 Garden Street

Santa Barbara, CA 93101

Dear Dr. Tosh:

Congratulations! A grant has been approved for **Planned Parenthood Santa Barbara, Ventura, San Luis Obispo Counties** in the amount of \$42,500 from the S.L. Gimbel Foundation. The performance period for this grant is May 16, 2016 to May 16, 2017. Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

*To support the expansion of Education Department staff and extend services for the ICYC ("In Case You're Curious") textline service.*

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 **Wednesday, June 15, 2016**. 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 June 15, 2017** and a copy will be available online.

We wish you great success and look forward to working with you during the grant performance period. If you have any questions, please call me at 951-241-7777, ext. 114, or email me at [ccudiamat@thecommunityfoundation.net](mailto:ccudiamat@thecommunityfoundation.net).

Sincerely,

Celia Cudiamat

Executive Vice President of Programs

22489 Planned Parenthood of Santa Barbara, Ventura, SLO 20160261

GIMB1



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



Strengthening Inland Southern California through Philanthropy

3700 Sixth Street, Suite 200  
Riverside, CA 92501  
P: 951-241-7777 F: 951-684-1911  
www.thecommunityfoundation.net

## 2016 S.L. Gimbel Foundation Fund Grant Agreement

Organization: Planned Parenthood Santa Barbara, Ventura, San Luis Obispo Counties  
Grant Amount: \$42,500 Grant Number: 20160261  
Grant Period: May 16, 2016 through May 16, 2017  
Purpose: To support the expansion of Education Department staff and extend services for the ICYC ("In Case You're Curious") textline service.

### 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 recommends publicity for the grant and acknowledging The Community Foundation in internal correspondence, brochures as appropriate; newsletters, annual reports and email blasts or e-newsletters.

The credit line of "Made possible in part by a grant from the "S.L. Gimbel Foundation Advised Fund at The Community Foundation – Inland Southern California" 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](http://www.thecommunityfoundation.net).

Email our Marketing & Communications Officer, Charee Gillins, at [cgillins@thecommunityfoundation.net](mailto:cgillins@thecommunityfoundation.net) with any publicity questions as well as any copies of any printed or publicity materials that highlight the grant.

**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.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

Organization: 22489 Planned Parenthood of Santa Barbara, Ventura, SLO  
Grant Number: 20160261





Strengthening Inland Southern California through Philanthropy

3700 Sixth Street, Suite 200  
Riverside, CA 92501  
P: 951-241-7777 F: 951-684-1911  
www.thecommunityfoundation.net

2016 S.L. Gimbel Foundation Fund  
Grant Agreement

Project: GUMBI  
DATE: 5.26.16

Organization: **Planned Parenthood Santa Barbara, Ventura, San Luis Obispo Counties**  
Grant Amount: **\$42,500** Grant Number: **20160261**  
Grant Period: **July 1, 2016 to June 30, 2017**  
Purpose: **To support the expansion of Education Department staff and extend services for the ICYC ("In Case You're Curious") textline service.**

**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 recommends publicity for the grant and acknowledging The Community Foundation in internal correspondence, brochures as appropriate; newsletters, annual reports and email blasts or e-newsletters.

The credit line of "Made possible in part by a grant from the "S.L. Gimbel Foundation Advised Fund at The Community Foundation – Inland Southern California" 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](http://www.thecommunityfoundation.net).

Email our Marketing & Communications Officer, Charee Gillins, at [cgillins@thecommunityfoundation.net](mailto:cgillins@thecommunityfoundation.net) with any publicity questions as well as any copies of any printed or publicity materials that highlight the grant.

**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.

*Alre Hosh*

Signature

10/3/16

Date

Jenna Tosin

Printed Name

President / CEO

Title

Organization: 22489 Planned Parenthood of Santa Barbara, Ventura, SLO  
Grant Number: 20160261



Strengthening Inland Southern California through Philanthropy



BOARD OF DIRECTORS

October 7, 2016

S. L. Gimbel Foundation Fund

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Vice Chair of the Board

Pat Spafford, CPA  
Chief Financial Officer

Sergio Bohon  
Secretary of the Board

Dr. Paulette Brown-Hinds

Rabbi Hillel Cohn

James Cuevas  
Immediate Past Board Chair

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

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D. Matthew Pim

Teresa Rhyne

Kathleen Sawa

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms. Jenna Tosh, Ph.D.

President & CEO

Planned Parenthood Santa Barbara, Ventura, San Luis Obispo Counties

518 Garden Street

Santa Barbara, CA 93101

Dear Dr. Tosh:

The Community Foundation is pleased to enclose a grant check for \$42,500 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 July 31, 2017** and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

Please feel free to use the following grant recognition credit for your newsletter or annual report: "Planned Parenthood Santa Barbara, Ventura, San Luis Obispo Counties is supported by a grant from The S. L. Gimbel Foundation."

Should you have any questions, please contact me at 951-241-7777, ext. 114.

Sincerely,



Celia Cudiamat  
Executive Vice President of Programs

20160261

40966

GIMBPP



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

**CITIZENS BUSINESS BANK**  
 A Financial Services Company  
 3695 Main Street, Riverside, CA 92601  
 90-3414/1222

Check Fraud Protection for Business

PAY \* Forty-Two Thousand Five Hundred and no/100 \*

TO THE ORDER OF

DATE

AMOUNT

06/16/2016

\$\*\*\*\*42,500.00

Planned Parenthood Santa Barbara, Ventura, San  
 518 Garden Street  
 Santa Barbara, CA 93101



*Celia Andriamat*  
 AUTHORIZED SIGNATURE

Security features. Details on back.

⑈040966⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

40966

22489	Planned Parenthood Santa Barbara, Ventura, San	06/16/2016	040966	
20160261	05/26/2016 Expand Education Dept. and extend "ICYC" textline			42,500.00
GIMB	S.L. Gimbel Foundation Advised Fund			42,500.00

CHECK TOTAL: \$\*\*\*\*42,500.00

The Community Foundation

40966

22489	Planned Parenthood Santa Barbara, Ventura, San	06/16/2016	040966	
20160261	05/26/2016 Expand Education Dept. and extend "ICYC" textline			42,500.00
GIMB	S.L. Gimbel Foundation Advised Fund			42,500.00

CHECK TOTAL: \$\*\*\*\*42,500.00