



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

Internal Use Only:  
Grant: 20160032

GRANTEE I.D. 6394  
\$ 75,000

**Organization / Agency Information**

<i>Organization/Agency Name:</i> Reach Out		
<i>Physical Address:</i> 1126 West Foothill Boulevard		<i>City/State/Zip:</i> Upland, CA 91786
<i>Mailing Address:</i> 1126 West Foothill Boulevard, Suite 250		<i>City/State/Zip:</i> Upland, CA 91786
<i>CEO or Director:</i> Diana Fox		<i>Title:</i> Executive Director
<i>Phone:</i> 909-982-9641	<i>Fax:</i> 909-982-8642	<i>Email:</i> diana@we-reachout.org
<i>Contact Person:</i> Diana Fox		<i>Title:</i> Executive Director
<i>Phone:</i> 909-982-8641	<i>Fax:</i> 909-982-8642	<i>Email:</i> diana@we-reachout.org
<i>Web Site Address:</i> www.we-reachout.org		<i>Tax ID:</i> 95-2642747

**Program / Grant Information**

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

<i>Program/Project Name:</i> Student Assistance Program			<i>Amount of Grant Requested:</i> \$75,000 <u>ds</u>
<i>Total Organization Budget:</i> \$3,293,684	<i>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</i> 83.48%	<i>Per 990, Percentage of Management &amp; General Expenses Only (Column C / Column A x 100):</i> 14.41%	<i>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</i> 16.51%
<i>Purpose of Grant Request (one sentence):</i> Reach Out is requesting funding for the Student Assistance Program, which is a school-based mental health approach to providing focused services to students seeking support or needing interventions for academics, behavior and attendance, often due to deeper concerns relating to mental health, substance abuse or social issues.			
<i>Program Start Date (Month and Year):</i> October 2016		<i>Program End Date (Month and Year):</i> September 2017	
<i>Gimbel Grants Received: List Year(s) and Award Amount(s)</i> N/A			

**Signatures**

<i>Board President / Chair: (Print name and Title)</i> Veronica Saldaña, Chair of the Board of Directors	<i>Signature:</i> <u>Veronica Saldaña</u>	<i>Date:</i> 7/21/16
<i>Executive Director/President: (Print name and Title)</i> Diana Fox, Executive Director	<i>Signature:</i> <u>[Signature]</u>	<i>Date:</i> 7/21/16

## **2016 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?**

Reach Out's mission is to strengthen communities by bringing people together to solve our region's toughest issues: breaking barriers to educational achievement, expanding economic opportunities, and creating safe, healthy and innovative communities.

Reach Out has been working in the Inland Region for 47 years, and holds health equity, civic engagement, and transformational leadership as foundational necessities to a vibrant, healthy and strong community.

Reach Out's philosophy is based on the social-ecological model that demonstrates the interconnectedness of:

- The Individual
- The Family
- The Community, and
- The Environment

The four concentric blue circles in our logo embody this model. The first two domains, the Individual and Family, are primarily fulfilled by our direct services such as mentoring, counseling, primary prevention, and parenting classes. The last two domains, Community and Environment, are served by our policy and systems-level work that seeks to build community connectedness and leadership, while also changing the way our municipalities, school districts, law enforcement and communities function. Much of the work in these outer two realms is accomplished through collaboratives and coalitions, as well as strategic partnerships with cities.

Our approach differs from others in two ways: 1) we are firm believers in collaboration, and have eight collaboratives/coalitions under our fiscal and organizational leadership. All eight of these align across the common goal of increasing the health and quality of life for all residents of our region and involve the active participation of hundreds of people and organizations. While we provide the backbone infrastructure and staffing for these collaboratives, our goal is to build the inherent leadership of the group so that the work can be multiplied out through the talents and skills of the members. 2) Our direct services, which are vital to the people who need help now and can't wait for a policy or systems intervention to occur, are delivered in a manner that is respectful, culturally proficient, and that respects all clients and their lived experience. Reach Out's unique approach has garnered trust and recognition from our funders as an agency that works well with others, is often on the cutting edge leading change, and is rooted in community.

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

Reach Out is a leader in the Inland Region in designing, leading and supporting key initiatives such as Latino Health Collaboration, Partners for Innovative Communities (a multi-county coalition focused on building health in communities and violence prevention), Morongo Basin Community Collaborative, Fontana Community Collaborative, The Convergence, the Inland

Coalition, Healthy Jurupa Valley, Healthy Muscogy Coalition and Healthy San Bernardino Coalition. We are community-driven, yet able to hold and share a common vision for our region that inspires and mobilizes at all levels.

Reach Out is also the convener of the largest community wellness conference in the Inland region – The National Innovative Communities Conference – attracting more than 1,400 people from across the nation over 2 days at the Ontario Convention Center. This conference embodies both of the approaches above and has made it possible for hundreds of parents, community members, elected officials, urban planners, teachers, and law enforcement to make essential connections that strengthen their lives both at home and in the community.

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

The primary goal of Reach Out is to strengthen our region's health and well-being. We achieve that through our direct services, such as mentoring, counseling, primary prevention, and parenting classes are targeted in the Inland Region, primarily focused in cities throughout San Bernardino and Riverside Counties. The Inland Region is home to more than 4 million residents, and over 65% of residents are from communities of color with low educational attainment rates (46% have only a high school diploma or less) and high poverty rates.

Reach Out has set a precedent in delivering exemplary programs to some of the most disenfranchised adults and children in the Inland Region. Model programs include developing and implementing the first Youth Court programs in San Bernardino County and expanding programs in Riverside County, developing and implementing the Interagency Youth Resiliency T.E.A.M. program for foster and probation youth, Parenting Programs, Health Care Careers Pipeline Program, Substance Use Prevention and Intervention Programs, Teen Pregnancy Prevention and Parenting, Student Assistance Programs and the West End Community Health and Wellness Fair have been implemented.

We provide direct services to more than 20,000 children, teens, and adults each year in collaboration with law enforcement, schools, faith-based organizations, service providers and coalition partners. A majority of the individuals served are low-income, minority populations. These services, which are vital to the people who need help now and can't wait for a policy or systems intervention to occur, are delivered in a manner that is respectful, culturally proficient, and that respects all clients and their lived experience.

Reach Out is additionally engaged in policy and systems-level work that seeks to build community connectedness and leadership, while also changing the way our municipalities, school districts, law enforcement and communities function. Much of this work is accomplished through collaboratives and coalitions, as well as strategic partnerships with cities.

## **II. Project Information:**

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

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

For the year of 2014-2015, the Chaffey Joint Union High School District reported suspensions of 1,232 students (5% of total student body). In the same time period, over 250 students entering

into the 9th grade had not met the standards for Language Arts and Mathematics, suggesting demand for the programming offered by the Student Assistance Program (SAP). The students who access SAP are predominantly from communities of color (66.1% of residents are non-white) with low educational attainment rates (46% of adults have only a high school diploma or less) and high poverty rates (25.4% of young people are living in poverty). According to kidsdata.org, San Bernardino County ranks fifth among all counties in the state with a homeless student population of 36,886 out of its 411,000 students in K-12 public schools, according to data released by the California Homeless Youth Project. Students in this area are also coming from a community with a violent crime rate of over 14,000 calls for service for crimes committed by youth. We know from the research that students from areas exposed to violence are likely to suffer severe trauma, which can hinder physical and mental development as well as leading to difficulties at school. We also know from Balfanz & Bynes (2012) that chronic absenteeism cuts across gender, geographic location, and social economic status. However the primary characteristic of students with poor attendance is that they live in or near poverty and crime areas. It is from this combination of needs we believe SAP will provide a significantly enriching experience for the students attending the school.

## **B) Project Description**

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

SAP is a school-based, mental health approach to providing focused services to students seeking support or needing interventions for academics, behavior, and attendance, often due to deeper concerns relating to mental health, substance abuse or social issues. The Positive Youth Development Framework in the SAP program aims to serve students and their families through a systematic process to "meeting youth where they are" by using techniques to mobilize resources to remove barriers to learning and social emotional growth. SAP will include more rigorous and intensive interventions that will serve to increase the retention and success rates of the program, giving at-risk students and their families the tools and resources to actualize their academic, social and emotional goals through life coaching, learning, family engagement, and youth leadership groups. This pilot program will target incoming 9th grade students who demonstrate early-warning indicators such as course failure, truancy, participation in the juvenile justice system, use of or at risk of use of illegal substances, and suspension. School site personnel, counselors, social workers, parents, or the students themselves are sources of referrals to the program. Participants will then be administered Life Coaching and Case Management through a 9-month (academic year) program that includes:

- Assessment, Goal Setting and Plan Development
- Ongoing Life Coaching (Case Management Services)
- Parent/Caregiver Engagement
- Social and Emotional Learning Group
- Youth Leadership Development Group

These core modules have been identified and targeted for their proven efficacy in empowering youth and their families with social-emotional skills, community engagement, and life skills that will last far past the end of the program, and will give participants and their families the tools for becoming more resilient and more successful in school and life.

Referral services will also be provided through Reach Out's many partners for participants who require additional mental health, substance abuse, or other services immediately upon having their needs identified.

**C) Project Goal, Objectives, Activities and Expected Outcomes**

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

The goal of SAP is to strengthen school engagement and academic promotion of high school students who demonstrate high risk for future high school dropout.

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

By the end of the grant period:

- 40 at-risk students and their families will be served with goal setting and plan development, life coaching and case management, parent/caregiver engagement sessions, social and emotional learning, and youth leadership development groups.
- 50% of students will report an increase in protective factors as evidenced by pre- and post-testing.
- Participating students will learn and implement strategies for higher academic achievement.

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

Activities for 40 SAP students will include:

- *Assessment, Goal Setting and Plan Development* - administering assessment to identify needs and challenges to support youth around school attendance, behavior and social-emotional skills, and community attachment/engagement development.
- *Ongoing Life Coaching (Case Management Services)* – Biweekly one-on-one coaching sessions informed by the professional competencies and framework outlined in the American School Counselor Association standards, and focused on implementing individual goal plans, and monitoring and tracking student data.
- *Parent/Caregiver Engagement* – Engaging parents in the implementation of the individual goal plan through phone or in-person contacts, linkage and referral to other Reach Out programs for parents, and parent education presentations.
- *Social and Emotional Learning* – Weekly peer support and social emotional learning support to develop and practice skills. Informed by the Positive Youth Development (PYD) Framework to build skills around behavior management, decision-making, healthy relationships, empathy, and developing self-efficacy.
- *Youth Leadership Development Group* – Students will identify a community or school issue, campaign or service learning opportunity and implement a youth-led project over the school year. YLD will involve students as active agents, using advocacy skills to address issues in their school and community, and leveraging resources and seeking guidance from those who have current domain over the issue.

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

*Objective I: By the end of the grant period, 40 at-risk students and their families will be served with goal setting and plan development, life coaching and case management, parent/caregiver engagement sessions, social and emotional learning, and youth leadership development groups.*

*Activities:* 1) Assessment, Goal Planning and Plan Development; 2) Ongoing Life Coaching 3) Parent/Caregiver Engagement; 4) Social and Emotional Learning and; 5) Youth Leadership Development Group

*Expected Outcomes:* At least 75% of participants will accomplish their goals as outlined in their Goal Plan. At least 65% of participants will complete the Youth Leadership campaign or project.

*Objective II: By the end of the grant period, 50% of students will report an increase in protective factors as evidenced by pre- and post-testing.*

*Activities:* 1) Assessment, Goal Planning and Plan Development; 2) Ongoing Life Coaching 3) Parent/Caregiver Engagement; 4) Social and Emotional Learning

*Expected Outcomes:* At least 50% of participants will report strengthened protective factors, including connection to caring adults and positive peer relationships.

*Objective III: Participating students will learn and implement strategies for higher academic achievement.*

*Activities:* 1) Assessment, Goal Setting and Plan Development; 2) Ongoing Life Coaching; 3) Parent/Caregiver Engagement

*Expected Outcomes:* At least 75% of the teachers serving participants will report improved academic achievement and/or improved classroom behavior. At least 50% of participants will reduce absent days as evidenced by school records.

#### **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.**

##### **Month 1 (Beginning of Academic Year)**

*Promotion and Outreach* will be provided to a minimum of 300 unduplicated adolescents. Of these 300, 40 will enter the SAP Program. Participants will complete an Orientation Meeting and Requirements, including 2 coaching session and required registration forms.

*Assessment, Goal Setting and Plan Development (4 hours): Conduct baseline assessment and develop individual Goal Plan to identify academic, social/emotional, and community engagement goals and priorities.*

- Review students' cumulative file for academic progress (grades, test scores, credits, class)
- Administer assessment to identify needs and challenges to support youth around school attendance, behavior and social-emotional skills, and community attachment/engagement

development. Conduct individual interview to determine need for referral to external mental health services

- Develop goal plan in collaboration with the student using a Positive Youth Development framework.

### **Months 2-10**

#### *Ongoing Life Coaching (Case Management Services) – 28 Weeks (28 hours)*

Biweekly one one-on-one coaching sessions for 1 hour during the school day as a pull-out session. Informed by the professional competencies and framework outlined in the American School Counselor Association (ASCA) standards in academic, career and personal/social development.

- Implement individual goal plan through weekly coaching to support social-emotional skill development and progress towards 3 and 6-month goals.
- Monitor school attendance weekly and follow-up with youth and families as needed, including contacting parents/caregivers, and identifying and addressing barriers to regular school attendance.
- Gather and track data monthly from student records for discipline, attendance and grades.
- Meet with teaching staff to monitor student progress on a monthly basis and to address attendance, engagement and social-emotional intervention issues as needed.

#### *Parent/Caregiver Engagement – 32 weeks (16 hours)*

Engage parents in the implementation of individual goal plan through:

- At a minimum two phone or in person contacts with parents/caregiver per month, with additional as needed or requested to update on progress
- Linkage and referral to other ROWE Programs for parents
- Four 1.5-hour parent education presentation(s) over the year

#### *Social & Emotional Learning Group – 24 weeks (24 hours)*

Weekly peer support and social emotional learning support group to develop and practice skills. Provided 1 hour per week, during the school day as a pull-out session. Facilitated by the Life Coach, group will be informed by the Positive Youth Development (PYD) Framework and use the SELD Life Skill curriculum to build skills around behavior management, decision-making, healthy relationships, empathy, and develop self-efficacy.

#### *Youth Leadership Development Group - Biweekly for 24 weeks (18 hours)*

Youth Leadership Group: 1.5 hours per week, during afterschool time and facilitated by Health Policy Specialists concurrent with the Life Coaching and SELD components. Students will identify a community or school issue, campaign or service learning opportunity and implement youth-led project over the school year using Reach Out-designed approach. YLD will involve students as active agents, using advocacy skills to address issues in their school and community, and leveraging resources and seeking guidance from those who have current domain over the issue.

### **Months 11-12**

#### *Evaluation Activities*

**E) Target Population**

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

The target population is low-income, at risk and underserved youth and their families in the Chaffey Joint Union High School District in San Bernardino County who have been exposed to trauma, are experiencing the first onset of mental health issues, experiencing high levels of familial stress, or are at risk for school failure and/or experiencing juvenile justice involvement. Students will be identified by early-warning indicators in 8th grade, and begin participation in the 9th grade. This year, we expect to serve 40 students and their families.

**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?**

Currently, the SAP program is provided to school districts throughout San Bernardino County through different partner organizations, and Reach Out is a part of this network. Reach Out partners with school districts in San Bernardino County to offer these services, as well as agencies who provide other interventions in the area of mental health, such as clinical interventions, for students and their family members who require higher levels of intervention. Currently, our strongest partner for this is the Samaritan Counseling Center. SAP is a program that requires a high level of confidentiality and counselors need to be highly trained before interacting with students. However, SAP counselors utilize Reach Out's volunteer base by having them aid in planning and creating the materials necessary to deliver a session, such as packets and lesson plans. Reach Out's volunteers are also very involved in helping with the office work that supports the foundation of all Reach Out programs.

**F) Evaluation**

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

Project Success will be measured using PEAR (Program in Education, Afterschool and Resiliency) HAS (Holistic Student Assessment) pre- and post-tests of the participants, input from family members, school and program staff, and data collected from school sites for tracking the following: protective factors, including connection to caring adults and positive peer relationships, community engagement through the Youth Leadership campaign or projects, academic achievement and classroom behavior, goal accomplishments and outlined in the individualized goal plan, and growth in social and emotional skills.

**G) Use of Grant Funds**

**How will you use the grant funds?**

Grant funds will be utilized for personnel/staffing expenses for Student Wellness Counselors. Student Wellness Counselors provide counseling services to participants and their families, undertake needs assessments and appropriate referrals for students, aid in development of an individual goal plan around academic, social-emotional, and community engagement development goals, review participant cumulative file for academic progress, monitor school attendance weekly (including contacting parents/caregivers and identifying barriers to regular school attendance), gather and monitor data monthly from student records for discipline, attendance and grades to track participant progress to outcomes, meet with teaching staff to



monitor student progress and address barriers, and engage parents in the implementation of the individual goal plan. Other fund usages include program operating expenses such as staff mileage and training, and marketing/incentive items.

### **III. Project Future**

#### **A) Sustainability**

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

San Bernardino Department of Behavioral Health currently provides grant funds for the SAP program (10 years), and will extend further grant funds to the SAP program. This funding ends June 30, 2017. Kaiser Permanente will be providing \$15,000 for the SAP program. Chaffey Joint Union High School District will conduct referral services to the SAP program, provide space on campuses for program activities, and aid in tracking individual student progress and outcomes by providing student data.

During the life of the grant, Reach Out will be working with key partners to find alignment in services, building important relationships and cross-sectoral agreements. Where possible, these relationships will ensure services can continue even after the primary program period expires. Moreover, Reach Out will seek additional funding in the form of grants, and convening with County departments and other funders to determine viable sources of future funding.

### **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?**

Reach Out's board is comprised of experienced and committed members who represent our region from many aspects – demographically, for priority/mission expertise, and for technical expertise for leading board committees. We currently have seven board members, and three committees: finance, personnel, and fund development. The board makes decisions through a process of discussion/consensus, and when called for, through majority vote. The board's role is to set the mission and vision for the agency, and to exercise its fiduciary duty in all matter pertaining to the proper governance and oversight of the agency.

#### **B) Management**

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

SAP is overseen by the Director of Student and Family Wellness (Karini Pereira) and the SAP Program Manager (Marcina Riley). Ms. Pereira holds a Master's Degree in Clinical Psychology: Marriage and Family Therapy, and has more than 10 years of experience working with at-risk and high-risk youth. Ms. Riley holds a Master's degree in Education and oversees the student wellness counselors who work directly with the students. The student wellness counselors all possess Pupil Personnel Service (school counselor) credentials (Master's level), and work with students who are in danger of suspension and/or expulsion, exhibiting poor academic performance, substance use and/or abuse, emotional problems, school discipline problems, truancy, criminal activity and/or negative attitudes toward school.

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### V. Project Budget and Narrative

#### A) Budget Table:

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
2 Student Wellness Counselors	2 Counselors x \$19/hr x 40 hrs/wk. x 52 wks = \$79,040		19,760	59,280	79,040
Benefits	\$79,040 x 23%=\$18,179		4,545	13,634	18,179
Mileage	150 miles/month x 12 months x .54=\$972		450	522	972
Marketing & Incentives for Program Participation	\$5 Gift Cards x 250 cards=\$1,250; \$2 Promotional Items/printing x 1500 = \$3,000	600	836	1,564	3,000
<b>TOTALS:</b>		600	25,591	75,000	\$101,191

**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

2 Student Wellness Counselors and Benefits for these positions: provide trauma-informed services to participants under the Youth Development Framework, coaching/mentoring and data-informed decision-making. Will be trained in facilitation skills, engagement navigation, and continuous experimental curriculum improvement training in order to equip them and maintain the changing relationship with the youth being served.

Mileage: Mileage for staff members traveling to school sites

Marketing and Incentives for Program Participation: materials to help ensure quality recruitment services, and high retention rates for the program

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

### *Secured/Awarded*

Name of Funder: Foundation, Corporation, Government	Amount
Edna McConnell Clark Fdtn/Weingart	400,000
The California Endowment	500,000
The Annenberg Foundation	100,000
Kaiser	30,500
County of San Bernardino	1,248,823
County of Riverside	225,000
Federal-direct	50,001
Cal Baptist University	73,686
First 5 San Bernardino	505,698
City of Jurupa Valley	34,150
Bear Valley Unified School District	5,000
Alta Loma Unified School District	22,000
Upland Unified School District	60,000
Corona-Norco Unified School District	66,000
Baldy View Regional Occupational Program	565,895
Center for Community Change	30,000
College Access Foundation of California	326,000
United Way	5,000
Office of Statewide Health Planning & Development	15,000
Riverside Community College District	198,000
Chaffey Cal Works	30,108

### *Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date

**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	\$825,040	26%	Program Fees	\$24,120	1%
Fundraising/Special Events	\$		Interest Income	\$	
Corp/Foundation Grants	\$239,805	8%	Other:	\$	
Government Grants/Contracts	\$2,139,480	65%	Other:	\$	

**Notes:**

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### VII. Financial Analysis

Agency Name: Reach Out

Most Current Fiscal Year (Dates): From 7/1/14 To: 6/30/15

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
\$3,293,684	\$2,749,679	\$474,807	\$69,198

**2) Calculate the percentages of Columns B, C, and D, over A (per totals above)**

- Program services (B) – A general rule is that at least 75% of total expenses should be used to support programs
- Management & general administration (C) – A general rule is that no more than 15% of total expenses should be used for management & general expenses
- Fundraising (D) – A general rule is that no more than 10% of total expenses should be used for fundraising

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	83%	14%	3%

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

Percentage of Organization's <u>Current</u> Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
15%	14%	1%

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.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$273,674	\$477,080	\$672,180	1.12

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**Excess or Deficit for the Year:**

<b>Excess or (Deficit)</b>	<b>Excess or (Deficit)</b>
<b>Most recent fiscal year end</b>	<b>Prior fiscal year end</b>
\$225,639	\$(563,467)

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**Notes:** During the FY201415 audit, a change in interpretation by our auditors of what was previously classified as revenue when received, was re-classified to deferred revenue. In addition, a prior year adjustment of this same change in interpretation was made, thereby further reducing revenue and re-classifying additional funds as deferred revenue.

Had this change in interpretation not been implemented, Reach Out would have been at a breakeven bottom line for the prior fiscal year noted above.

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**VIII. Application submission check list:**

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



# Board of Directors

*Fiscal Year 2015-16*

<b>Member Name</b>	<b>Veronica Saldaña</b>		<b>Joined Board: August 2013</b>
<b>Board Position</b>	Chair	<b>Affiliation</b>	Emerging Markets, Inc. / California FreshWorks Fund
<b>Address</b>	4898 Wiota Street, Los Angeles, CA 90041		
<b>Home Phone</b>		<b>Work Phone</b>	323.465.0406
<b>Cell Phone</b>	951.522.8884	<b>E-mail</b>	vero19@gmail.com

<b>Member Name</b>	<b>Michael Brown</b>		<b>Joined Board: September 2009</b>
<b>Board Position</b>	Vice-chair	<b>Affiliation</b>	Retired
<b>Address</b>	8607 Buggy Whip Road, Alta Loma CA 91701		
<b>Home Phone</b>	909.989.1487	<b>Work Phone</b>	
<b>Cell Phone</b>	909.912.4929	<b>E-mail</b>	mandml@charter.net

<b>Member Name</b>	<b>Kim Clark</b>		<b>Joined Board: December 2010</b>
<b>Board Position</b>	Member	<b>Affiliation</b>	California State Univ. San Bernardino
<b>Address</b>	225 Fountain Avenue, Redlands CA 92373		
<b>Home Phone</b>	909.793.0751	<b>Work Phone</b>	909.777.0855
<b>Cell Phone</b>	909.633.0711	<b>E-mail</b>	kim@positiveprevention.com

<b>Member Name</b>	<b>Andre Ellis</b>		<b>Joined Board: January 2014</b>
<b>Board Position</b>	CFO	<b>Affiliation</b>	Retired
<b>Address</b>	23 Meadowview Drive, Pomona, CA 91766		
<b>Home Phone</b>	909.622.2164	<b>Work Phone</b>	
<b>Cell Phone</b>	909.334.0500	<b>E-mail</b>	a.ellisconsulting@gmail.com

<b>Member Name</b>	<b>Josh Lee</b>		<b>Joined Board: January 2014</b>
<b>Board Position</b>	Member	<b>Affiliation</b>	San Bernardino Associated Govt.
<b>Address</b>	1170 W. 3rd Street, 2 <sup>nd</sup> Floor, San Bernardino, CA 92410		
<b>Home Phone</b>	6556 Amber Sky Way Eastvale, CA 92880	<b>Work Phone</b>	909.884.8276
<b>Cell Phone</b>	202.276.9381	<b>E-mail</b>	joshklee@gmail.com/jlee@sandbag.ca.gov

<b>Member Name</b>	<b>Madeline Patané</b>		<b>Joined Board: August 2005</b>
<b>Board Position</b>	Member	<b>Affiliation</b>	University of LaVerne
<b>Address</b>	9803 Fremont Avenue, Montclair CA 91763		
<b>Home Phone</b>	909.625.5865	<b>Work Phone</b>	Retired
<b>Cell Phone</b>	951.212.8335	<b>E-mail</b>	mpatane@verizon.net

<b>Member Name</b>	<b>Marco Ramirez</b>		<b>Joined Board: October 2008</b>
<b>Board Position</b>	Member	<b>Affiliation</b>	Cabrillo Economic Dev. Corp.
<b>Address</b>	1320 San Bernardino Road, Upland CA 91786		
<b>Home Phone</b>		<b>Work Phone</b>	
<b>Cell Phone</b>	909.560.6154	<b>E-mail</b>	marco.ramirez12@gmail.com

## Budget Comparison

	Actuals	Budget	Variance
	Most Recently Completed Year	Projections Current Year	
	2016	2017	
<b>Income</b>			
Individual Contributions	10,662	5,000	(5,662)
Corporate Contributions	15,000	52,100	37,100
Foundation Grants	941,653	480,585	(461,068)
Government Grants/Contracts	2,145,289	2,942,851	797,562
Non-Government Grants/Contracts	6,244	64,255	58,010
Other Earned Income	115,571	106,500	(9,070)
Other Unearned Income	0		
Interest & Dividend Income	15	500	485
<b>Total Income</b>	<b>3,234,434</b>	<b>3,651,791</b>	<b>417,357</b>
<b>Expenditures</b>			
<b>Personnel</b>			
Other Salaries	1,725,138	2,087,796	362,658
Payroll Taxes	159,353	183,000	23,647
Insurance - Workers' Comp	24,780	31,085	6,305
Insurance - Health	163,583	219,319	55,736
Payroll Services	1,730	5,000	3,270
Retirement	0		
<b>Total Personnel</b>	<b>2,074,584</b>	<b>2,526,200</b>	<b>451,616</b>
<b>General Program/Administrative</b>			
Bank/Investment Fee	14,158	6,500	(7,658)
Publications	4,898	10,160	5,262
Conferences & Meetings	106,418	119,500	13,082
Mileage & Travel	65,067	90,000	24,933
Audit & Accounting	10,700	10,700	0
Consultants	235,532	259,227	23,696
Insurance Expense	12,206	18,000	5,794
Telephone Expense	13,951	18,500	4,549
Occupancy Expense	105,218	135,660	30,442
Website	2,243	3,200	957
Office Supplies	80,011	88,400	8,389
Postage & Delivery	1,005	2,500	1,495
Printing & Copying	73,510	93,500	19,990
Miscellaneous	209,294	240,670	31,373
<b>Total General Program/Administrative</b>	<b>934,211</b>	<b>1,096,517</b>	<b>162,306 -</b>
<b>Total Expenditures</b>	<b>3,008,795 -</b>	<b>3,622,717</b>	<b>613,922 -</b>
<b>Revenue Less Expense</b>	<b>225,639 -</b>	<b>29,074</b>	<b>196,565-</b>



**Part IX Statement of Functional Expenses**

Check if Schedule O contains a response or note to any line in this Part IX.

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(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.....	100,000.	7,934.	92,066.	0.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).....	0.	0.	0.	0.
7 Other salaries and wages.....	1,766,378.	1,565,446.	156,173.	44,759.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).....				
9 Other employee benefits.....	187,465.	163,840.	23,625.	
10 Payroll taxes.....	160,063.	134,077.	21,694.	4,292.
11 Fees for services (non-employees):				
a Management.....				
b Legal.....	4,726.		4,726.	
c Accounting.....	10,500.		10,500.	
d Lobbying.....				
e Professional fundraising services. See Part IV, line 17....				
f Investment management fees.....				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O).....	157,424.	140,734.	16,690.	
12 Advertising and promotion.....				
13 Office expenses.....	92,152.	42,735.	49,417.	
14 Information technology.....				
15 Royalties.....				
16 Occupancy.....	118,792.	93,831.	24,961.	
17 Travel.....	192,956.	184,043.	8,913.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.....				
19 Conferences, conventions, and meetings....	29,864.	21,426.	8,438.	
20 Interest.....				
21 Payments to affiliates.....				
22 Depreciation, depletion, and amortization ...	11,958.		11,958.	
23 Insurance.....	27,408.	20,685.	6,299.	424.
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>Program related costs</u> .....	342,541.	342,541.		
b <u>Promotion</u> .....	44,288.	24,164.	401.	19,723.
c <u>Miscellaneous</u> .....	40,123.	1,177.	38,946.	
d <u>Program activities</u> .....	7,046.	7,046.		
e All other expenses.....				
25 Total functional expenses. Add lines 1 through 24e. ...	3,293,684.	2,749,679.	474,807.	69,198.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).....				

**Internal Revenue Service**

**Date:** September 4, 2007

REACH OUT WEST END INC  
1126 W FOOTHILL BLVD STE 185  
UPLAND CA 91786-3777

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

**Person to Contact:**

Paul Perry 17-57103  
Customer Service Representative

**Toll Free Telephone Number:**  
877-829-5500

**Federal Identification Number:**  
95-2642747

Dear Sir or Madam:

This is in response to your request of September 4, 2007, regarding your organization's tax-exempt status.

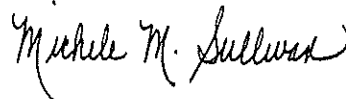
In August 1970 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

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

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

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

Sincerely,



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



Strengthening Inland Southern California through Philanthropy



BOARD OF DIRECTORS September 23, 2016

S. L. Gimbel Foundation Fund

Philip Savage IV  
Chair of the Board

Sean Varner  
Vice Chair of the Board

Pat Spafford, CPA  
Chief Financial Officer

Sergio Bohon  
Secretary of the Board

Dr. Paulette Brown-Hinds

Rabbi Hillel Cohn

James Cuevas  
Immediate Past Board Chair

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Teresa Rhyne

Kathleen Sawa

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms. Diana Fox  
Executive Director  
Reach Out West End, Inc.  
1126 West Foothill Boulevard, #250  
Upland, CA 91786

Dear Ms. Fox:

Congratulations! A grant has been approved for Reach Out West End, Inc. in the amount of \$75,000.00 from the S.L. Gimbel Foundation. The performance period for this grant is October 1, 2016 to September 30, 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 Student Assistance Program for at-risk students seeking focused services.*

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, please sign and date the agreement and return with original signature to The Community Foundation by Friday, October 7, 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 October 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

6394 Reach Out West End, Inc.

20160632

GIMB-2R



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

**Organization:** Reach Out West End, Inc.  
**Grant Amount:** \$75,000 **Grant Number:** 20160632  
**Grant Period:** October 1, 2016 to September 30, 2017  
**Purpose:** To support the Student Assistance Program for at-risk students seeking focused services.

**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.

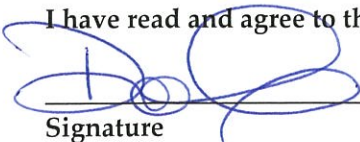
**8. Termination**

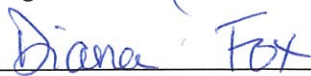
The Community Foundation may terminate this agreement, withhold payments, or both at any time, if, in the Community Foundation's judgment: a) The Community Foundation is not satisfied with the quality of the Grantee's progress toward achieving the project goals and objectives; b) the Grantee dissolves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

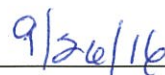
**9. Limitation of Support**

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

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

  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Title

Organization: 6394 Reach Out West End, Inc.  
Grant Number: 20160632



Strengthening Inland Southern California through Philanthropy



October 7, 2016

BOARD OF DIRECTORS

Philip Savage IV  
Chair of the Board

Sean Varner  
Vice Chair of the Board

Pat Spafford, CPA  
Chief Financial Officer

Sergio Bohon  
Secretary of the Board

Dr. Paulette Brown-Hinds

Rabbi Hillel Cohn

James Cuevas  
Immediate Past Board Chair

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Teresa Rhyne

Kathleen Sawa

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms. Diana Fox  
Executive Director  
Reach Out West End, Inc.  
1126 West Foothill Boulevard, #250  
Upland, CA 91786

Dear Ms. Fox:

The Community Foundation is pleased to enclose a grant check for \$75,000 from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned.

The completed Grant Evaluation form is due by October 15, 2017 and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

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

Please feel free to contact me at 951-241-7777, ext. 114, if you have any questions.

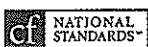
Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

20160632

41435

GIMB75



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 92501  
 90-3414/1222

EZCheck™ Check Fraud Protection for Business

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

TO THE ORDER OF

DATE

10/05/2016

AMOUNT

\$\*\*\*\*75,000.00

Reach Out West End, Inc.  
 1126 West Foothill Boulevard, #250  
 Upland, CA 91786



*Jonathan Lorenzo Galan*  
*Chris Chidamurti*  
 AUTHORIZED SIGNATURE

⑈041435⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

41435

6394 Reach Out West End, Inc.

10/05/2016 041435

20160632 08/08/2016 Student Assistance Program  
 GIMB S.L. Gimbel Foundation Advised Fund

75,000.00 75,000.00

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

The Community Foundation

41435

6394 Reach Out West End, Inc.

10/05/2016 041435

20160632 08/08/2016 Student Assistance Program  
 GIMB S.L. Gimbel Foundation Advised Fund

75,000.00 75,000.00

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