



2014 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant: 20140741

\$25,000

Organization / Agency Information

Organization/Agency Name: San Bernardino Symphony Association		
Physical Address: 198 N. Arrowhead Avenue		City/State/Zip: San Bdo, CA 92408
Mailing Address: 198 N. Arrowhead Avenue		City/State/Zip: San Bdo, CA 92408
CEO or Director: Dr. Anne L. Viricel		Title: Executive Director
Phone: (909) 381-5388	Fax: (909) 899-7954	Email: alviricel@sanbernardinosymphony.org
Contact Person: Dr. Anne L. Viricel		Title: Executive Director
Phone: (909) 381-5388	Fax: (909) 899-7954	Email: alviricel@sanbernardinosymphony.org
Web Site Address: www.sanbernardnosymphony.org		Tax ID: 95-6153923

Program / Grant Information

Interest Area: Health Environment Animal Protection Education Human Dignity

Program / Project Name: Musicians in the Schools		
Amount of Grant Requested: \$25,000	Total Organization Budget: \$691,501	Percentage of Organization's Total Budget used for Administration: 21%
Purpose of Grant Request (one sentence): The purpose of this grant request is to secure partial funding for the on-going Musicians in the Schools program which, for the past three years, has significantly enhanced the quality and comprehensiveness of music education in the San Bernardino City Unified School District.		
Gimbel Grants Received: List Year(s) and Award Amount(s) 2012 - \$25,000; 2011 - \$13,869		

Signatures

Board President / Chair: (Print name and Title) Dr. Judith Valles, President	Signature: 	Date: 7/28/2014
Executive Director/President: (Print name and Title) Dr. Anne L. Viricel, Executive Director	Signature: 	Date: 7/27/14

2014 S.L. Gimbel Foundation Fund APPLICATION - Narrative

I. Organization Background; Target Population:

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

Since young musician/conductor James K. Guthrie founded the San Bernardino Symphony Orchestra (SBSO) in 1929, our purpose-driven mission has remained to foster a love of music, excite the spirit, and enrich our diverse community and region through live orchestral performances and music education. We design our processes and supporting systems with this mission in mind so that we may most effectively meet our two-fold goal, consistently maintaining rigorous financial controls to ensure every dollar is spent wisely.

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

The SBSO has faced a number of challenges over the past several years, including the loss of an annual \$70K city contribution and changes in organizational leadership. However, through adherence to our guiding principles and a business-focused operating philosophy, the SBSO completed our 2013/14 fiscal year on a positive financial footing and predicts an outstanding 2014/15 season from both a financial and artistic perspective. Other accomplishments include the milestone of interfacing with 90,000 SBCUSD students through our various music education programs, contributing toward a 5% increase in student participation in school music programs, provision of annual student concerts, completion of a third year of Symphony Strings Workshops benefitting over 200 students, and an increase in concert audience diversity across all demographics.

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

Our key programs and activities address the two-fold mission under which we operate. To provide accessible music to the community, we offer an annual five concert series consisting of diverse musical offerings to meet a variety of aesthetics. In the 2014/15 season, our theme is "By Request: The music you want to hear" because the season was specifically designed based upon requests from our concert-goers who represent the diversity of the Inland Empire demographic which is 57% Latino, 26% White, 8% African American, 7% Asian, 1.7% Multiracial, and .3% American Indian. To provide music education, we focus more closely to our San Bernardino home through a partnership with the SBCUSD. We augment the work of teachers through our volunteer docent program whereby musical instruments are introduced to third grade students preparing for fourth grade band participation. We also provide trios of professional orchestra musicians to visit each of the District's public schools for educational and informative workshops geared to the fourth/fifth grade curriculum. We provide free concert tickets to students and their families, and this year, we will double the number of free student concerts we offer from one to two, and the selected concert, "Musical Genius in America," will augment student studies relating to Black History Month.

II. Project Information:

A) Statement of Need

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

Our student programs, such as Musicians in the Schools, are of specific benefit to the community because although our regular concert attendees are economically able to participate in the arts, the vast majority of the students we serve live at well below the region's median income. Many of these young people are considered at-risk or otherwise underserved. Most come from homes where the economic situation is such that music education is only possible through its availability in the public classroom. Yet these are the region's future leaders and it would be more than negligent of an organization with our mission to fail to provide opportunities to increase cultural awareness through the service we provide: orchestral music.

B) Project Goal, Objectives and Methodology

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

The goal of the proposed program is to meet the need for enhanced cultural awareness in participating students – leading to improved academic performance and a wider world-view - while lifting some of the teaching burden from already over-worked teaching staff and the limited arts budget in the SBCUSD. Forged through our strong relationship with the District, Musicians in the Schools provides an uplifting and educational workshop experience and a unique opportunity for direct interaction with orchestral musicians whose efforts not only augment classroom efforts, but enhance them with career-focused real world examples.

2. State up to three objectives. Objectives should be specific, measurable, action-oriented, realistic, and time-specific. Specify the activities you will undertake to meet each objective. Use the following format for your objectives and respective activities:

Objective I: Increase cultural awareness in participating students

Activities: Musicians in the Schools introduces orchestral instruments to students in a positive, accessible way where hands-on interaction is encouraged. Further, the ‘mystery’ of attending a concert is reduced through direct interaction with friendly, education-focused musicians who share their talents through classical, popular, and even cartoon music. This unique opportunity leads to greater interest in music – especially orchestral music – which increases cultural awareness.

Objective II: Assist SBCUSD through enhancement to current classroom experiences

Activities: The program introduces musical instruments to third grade students preparing for fourth grade band participation. Concurrently, we provide trios of professional orchestra musicians for educational music workshops for all fourth and fifth grade students. These activities introduce new professional participants in the education process and alleviate the need for local educators to have to master, then deliver, these relatively costly specialized services.

Objective III: Increase participation in SBCUSD music programs by 5% annually

Activities: The student workshops will include segments designed to encourage participation in District music programs by enhancing knowledge of musicianship and elevating teamwork thereby meeting the program’s annual goal of a 5% music program participation increase.

Provide a timeline for implementing the project?

- On-Going – Dr. Viricel and musicians working with Dan Reed of SBCUSD to develop more comprehensive workshop lesson plan for deliver this year.
- August 2014 – Mr. Reed to select schools and schedule participation.
- Mid-August 2014 – Docent and musician volunteers to be secured and individually scheduled.
- September – October, 2014 – Classroom visits to as many schools as feasible (Docent and Musician visits run concurrently over 10-14 weeks).

3. Who will this grant serve? Describe your target population. How many people will be impacted? Provide a breakdown: Number of Children, Youth, Adults, Seniors, Animals. Include a detailed list of activities and number of participants for each activity.

The target population is students in the SBCUSD and their families. This year, we plan to serve 1,200 third graders through our Docent Program and 3,000 fourth/first graders through our Musicians in the Schools program. Students will be provided with concert tickets, and we estimate 50% will use them, each bringing one adult guardian for a total of 2,100 adults of various ages.

4. How does this project relate to other existing projects in the community? Who else in the community is providing this service or has a similar project? Who are your community partners (if any)? How are you utilizing volunteers?

No other known group provides a similar project or service to the students in the SBCUSD. 25+ volunteers from the Symphony's own Guild, as well as volunteers engaged through the District provide in-class docent services for the 10-14 weeks of instrument introduction.

C) Project Outcomes and Evaluation

1. What are the key anticipated outcomes of the project and impact on participants?

The primary quantifiable outcome of project impact is the rate of increase in student participation in SBCUSD music programs. If the students have been appropriately benefited, it is appropriate to believe there will be increased participation. In past years, that amount has been approximately 5% per school year. In 2014/15, the goal will also be 5%.

2. How will you know if you have achieved the expected outcomes?

Participation in school music programs will have increased by the stated percent goal and "scholarshipped" concert seats will be filled.

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

Course enrollment data is regularly collected by the SBCUSD and will be provided to SBSO for analysis. Data will be analyzed as to whether an increase occurred, and for the first time – to gauge participation across socio-economic and demographic groups. In this way, we will know if the students most at-risk will have been specifically benefitted.

D) How will you use the grant funds?

Grant funds will be used to cover the cost of musician-led workshops, "scholarshipped" concert seats, and to cover 25% of the project administration fees.

III. Project Future

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

To meet District calendar and musician availability parameters, the subject project will run through the grant performance period only. The project begins the following school year at the same time with the number of meetings tailored to available funding.

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

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

A 28-member Board provides oversight and guidance for the organization. Committees include Finance (reviews financial reports), Artistic (selects compositions for concerts), Marketing (plans outreach efforts), Endowment (manages endowment funds), Funds Development (donor identification and contact efforts in line with budgeted goals), Governance (recommends new Board outreach), Special Events (runs fund raising and recognition events), Education and Outreach (coordinates school visits of all types) Guthrie (manages the Guthrie Music Library owned by the Symphony). An Executive Committee made up of leaders from each individual committee meets monthly to discuss activities and obtain approvals.

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

SBSO Executive Director, Dr. Anne L. Viricel, will serve as project director. An educator for over 15 years at the college level, she holds a K-12 credential, and is a member of the SBCUSD VAPA Strategic Board. SBSO First Chair Cellist, Ana Maria Maldonado will be responsible for scheduling the musicians and interfacing with Dr. Viricel and Mr. Reed regarding workshop content. All musicians selected for the project will be from among those professionals vetted for participation with the SBSO during the 2014/15 season. As in years past, care is always taken to utilize musicians who are also music teachers, with those instructing K-12 students given priority.

2014 S.L. Gimbel Foundation APPLICATION

V. Project Budget

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

Line Item Description	Line Item Explanation (Formula/equation used as applicable. Example: 40 books @ \$100 each = \$4000)	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Musician Program Fees	1 Musician Ensemble x School Sites at \$700/site = \$31,500		\$10,000	\$21,500	\$31,500
Executive Director Labor – Program Coord. And Support	80 hours @ \$35/hour = \$2,900	\$ 2,175 (75%)		\$ 725 (25%)	2,900
Operations manager – Musician Coord. And Payroll Admin.	72 hours @ \$25/hour = \$1,800	\$ 1,350 (75%)		\$ 450 (25%)	1,800
Development of educational materials and participant fliers			No reprographics charges - SBCUSD will print and distribute		0
Special signage, supplies				\$ 125	\$ 125
Photo/Video Documentation				\$ 300	\$ 300
Participant Concert Scholarships	400 attendees @ \$25/each = \$10,000	\$ 1,700	\$ 6,400	\$ 1,900	\$10,000
Program Venues/Staging, & AV Equipmt.	No Charge – SBCUSD to provide		In Kind		0
Transportation from off-site locations to workshop venues	No Charge – SBCUSD locations		In Kind		0
TOTALS:		\$5,225	\$16,400	\$25,000	\$46,625

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
San Bernardino Valley Concert Association	\$10,000
Bank of America Foundation	4,000
Misc. Donors of Student Scholarship Concert Seats	2,400

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Land'o'Lakes Foundation	\$2,000	9/30/14
United Commercial Travelers	\$ 500	8/15/14
Kiwanis Club of San Bernardino	\$1,000	8/31/14

VII. Financial Analysis

Agency Name: San Bernardino Symphony Association

Most Current Fiscal Year (Dates): From 7/1/12 To: 6/30/13

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

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

Program Expenses	/Total Operating Expenses	= Program Expense Ratio
\$586,184	\$812,085 756,627	72% 77%
990: Part IX, Column B, Line 25	990: Part IX, Column A, Line 25	<i>w/ FUNDRAISING 84%</i>

Administrative Expense (100%-Program Expense ratio) per 990 above	Percentage of Organization's Current Total Budget used for Administration (from cover page)	Differential
28%	21%	2 18%

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

Program Expense Ratio data shown relates to FY 2012/13. The Ratio in 2013/14 is >80%.

w/ FR 13%

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
\$103,828	\$4,198	\$4,741	22.79

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
-\$115,343.34 (FYE 6/30/13)	\$94 (FYE 6/30/12)

Notes: The SBSO suffered investment losses of \$100,070 in FY 2012/13. This resulted in a strategic change from Merrill Lynch to National Planning Corporation (NPC) and the establishment of an investment account with The Community Foundation. FY 2013/14 saw investment gains of >\$35K.

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	\$173,044.06	26%	Ticket Income	\$74,994.00	11%
Special Events (Guild)	\$ 47,175.00	7%	Interest Income	\$57,666.00	9%
Corp/Foundation Grants	\$162,635.00	24%	Contract Concerts	\$67,236.97	10%
Government Grants	\$	0%	Guthrie Library	\$11,465.02	2%
In-Kind (Advtsg and other)	\$ 62,918.95	9%	Other Spec. Events	\$ 5,435.00	1%

Notes:

Above data is most current available: FYE 2013/14 (7/1/13 – 6/30/14). Current budget (2014/15) also includes \$20K in government grants which have already been secured for use in that FY.

VIII. Application submission check list:

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

Budget Comparison

	Actuals	Budget	Variance
	Most Recently Completed Year	Projections Current Year	
	2013-14	2014-15	
Income			
Individual Contributions	\$195,777.00	\$200,000.00	\$ 4,223.00
Corporate Contributions	22,156.00	30,000.00	7,844.00
Foundation Grants	222,770.00	253,000.00	30,230.00
Government Contributions (NEA Grants)	-	20,000.00	10,000.00
Other Earned Income	160,626.00	168,000.00	7,374.00
Other Unearned Income	-	-	-
Interest & Dividend Income	57,666.00	60,000.00	2,334.00
Total Income	658,995.00	731,000.00	62,005.00
Expenditures			
Personnel			
Salary CEO	65,000.00	65,000.00	0.00
Salary Assistant	60,000.00	60,000.00	0.00
Payroll Taxes	12,222.86	12,222.86	0.00
Insurance - Workers' Comp	651.10	651.10	0.00
Insurance – Health*	9,105.00	660.00	8445.00
Payroll Services**	2,377.40	1,500.00	877.40
Retirement	0.00	0.00	0.00
Total Personnel	149,356.40	140,033.96	9,322.40
General Program/Administrative			
Bank/Investment Fee	0.00	0.00	0.00
Publications	50.00	50.00	0.00
Conferences & Meetings	1,395.00	1,395.00	0.00
Mileage	0.00	0.00	0.00
Audit & Accounting**	13,653.00	9,650.00	4,003.00
Program Consultants (Graphic Artist)	9,180.00	10,000.00	820.00
Insurance Expense	3,819.00	3,819.00	0.00
Telephone Expense - Land Lines	3,469.00	3,469.00	0.00
DSL & Internet	628.00	400.00	228.00
Website	2,090.50	2,000.00	90.50
Office Supplies	5,318.00	5,000.00	318.00
Postage & Delivery	1,135.00	1,200.00	0.00
Printing & Copying	4,300.00	4,100.00	200.00
Misc. (Licenses, Board Retreat, Funds Dev.)	7,025.00	7,000.00	25.00
Total General Program/Administrative	52,062.50	48,083.00	5,684.50
Total Expenditures	\$201,418.90	188,116.96	15,006.90
Revenue Less Expense	\$457,576.10	542,883.04	46,998.10

*Reduction in Health Insurance related to Operations Manager (OM) switching to Social Security health benefits at age 65.

**Reduction in Payroll Services and Audit/Accounting related to change from Paychex to The Tax Lady which will now handle both at a reduced rate.

**San Bernardino Symphony Association
2014/15 Board of Directors and Affiliations**

Board Position	Name	Affiliation
President	Dr. Judith Valles	Retired College Administrator; Former Mayor of San Bernardino
Vice President	Earleen Ferguson-Dudley	Vice President, Garden Interiors
Secretary	Grace Baldwin	Retired Teacher
Treasurer	Phillip Waller	CPA, Rogers, Anderson, Malody & Scott
Board Member	Jan Bell	Retired Teacher
Board Member	Erin Brinker	Exec. Director of Think Together
Board Member	Donna Cooley	Retired Teacher
Board Member	Dr. Ben Eby	Dentist
Board Member	Dr. Carolyn Eggleston	Professor, Cal State San Bernardino
Board Member	Judi Fettel	Retired
Board Member	Dr. Jay Fiene	Administrator, Cal State San Bernardino
Board Member	Dr. Dorothy Garcia	Retired Teacher
Board Member	Lloyd Garrison	Retired Marketing Executive
Board Member	Gigi Hanna	San Bernardino City Clerk
Board Member	Marilyn Karnig	Retired
Board Member	Dr. Robert Knop	Head of Jazz Dept., Cal State San Bdo.
Board Member	Hon. Cynthia Ludvigsen	San Bernardino County Judge
Board Member	Gigi Hanna	City Clerk, City of San Bernardino
Board Member	Gloria Macias-Harrison	Co-Owner IE Community News
Board Member	Wendy Marzullo	Homemaker
Board Member	Dr. Audrey Mathews	Professor Emeritus
Board Member	Millie Mckim	Retired Librarian
Board Member	Dean McVay, Esq.	Attorney, Lewis, Brisbois, et al
Board Member	Judi Nowlin	Music Teacher, Rialto School District
Board Member	Judith Podskalan	IT Professor, Chaffey College
Board Member	Judy Rodriguez-Watson	Homemaker
Board Member	Mary Schnepf	Owner, Dakota Enterprises
Board Member	Jim Walling	CPA
Board Member	Lisa Weldy	Vice Pres., Meridian Land Development

San Bernardino Symphony

FY 2014/15 Budget

Ordinary Income/Expense

Income

Concert Income

Ticket Income

1	Allocated Season Tickets	57,500
2	Single Tickets	23,500
	Total Ticket Income	81,000
3	Contract Concerts	100,221
	Total Concert Income (w/o grants)	181,221

Advertising Income

4	Allocated Program Ads	\$ 9,000
	Total Advertising Income	9,000

Guthrie Library Income

Net Zero to expenses.

5	Guthrie Donations	500
6	Rental Income	9,779
7	Shipping & Handling Income	1,000
	Total Guthrie Income	11,279

Donation Income

8	General Contributions (includes all private (including Board "dues") and corporate donations, Trios, Concert Sponsorships, and Adopt-A-Musician.)	158,000
	Total Donation Income	158,000

Grant Income

Government Grants

9	NEA Grants	20,000
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Foundation Grants

10	Irvine Grant	76,000
11	San Manuel	60,000
12	Education Grants	35,000
13	Other Grants	33,000
	Total Grant Income	224,000

14 Endowment Distribution

	Magnussen - ML	10,000
	Plash - ML	30,000
	Community Foundation	5,000
	Jones Account	10,000
	Total Endowment Dist.	55,000

Symphony Guild Income

15	Guild Fundraising Activities	50,000
	Total Guild Income	50,000

Other Income

16	Special Events	2,500
17	Board Meetings	500
	Total Other Income	3,000

Total Income 691,500

Cost of Goods Sold

Concert Payroll Expense

24	Artist	8,850
25	Conductor	35,000
26	Conductor Mileage	330
27	Orchestra	120,295
28	Paychex Fee - Orchestra	1,750
29	Payroll Taxes - Orchestra	18,790

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30	Pension Expense - Orchestra	18,656
31	Workers Comp - Orchestra	1,468
32	Stage Hands	13,500
33	Paychex Fee - Stage Hands	500
34	Payroll Taxes - Stage Hands	1,620
35	Pension Expense - Stage Hands	1,625
36	Workers Comp - Stage Hands	543
37	Stage Manager	3,250
38	Librarian	1,819
	Total Concert Payroll Expense	227,995

Other Concert Expense

Advertising

40	Season Brochures	2,408
41	Media/Newspaper	1,250
42	In Kind Advertising	-
43	Postcards/Posters/Etc.	750
44	Program Book/Flyers	3,000
45	Pre-Printed Tickets	800
	Total Advertising	8,208

47	Auditions	-
48	Concert Photography	350
49	Concert Lectures	500
50	Press Releases (done in house)	-
51	Special Events	2,500
52	Merchandise to Sell (through Guild)	-
53	Hotel - Frank	1,750
54	Hotel - Artist	350
55	Music Purchase/Rental	600
56	Piano Move/Tune	1,500
57	Presentations/Awards	150
58	CA Theater Rent	25,000
59	Storage, music stands, chairs	600
	Total Other Concert Expense	33,300

Total Concert Expense **269,503**

Other Cost of Goods Sold

60	Contracted/Edu. Concert Expense	92,484
61	Edu. Programs (non-grant-funded)	35,000
62	Outreach Performances (Trios)	3,520
	Total Other Cost of Goods Sold	131,004

Total COGS **400,507**

Expense

Set as a net zero to
income as the SBSO
realizes no profit from this
work.

IRVINE GRANT EXPENSES

63	IRVINE - Music Director & Conductor	6,000
64	IRVINE - Musician Rehearsal Expense	21,000
65	IRVINE - Musician Performance Expense	20,000
66	IRVINE - Stage Manager	1,000
67	IRVINE - Rehearsal Venue Rental	300
68	IRVINE - Performance Venue Expense	1,000
69	IRVINE - Festival Hospitality	1,000
70	IRVINE - Storyteller Honorariums	1,050
71	IRVINE - Audience Engagement Activities	7,000
72	IRVINE - Community Conversation Facilitator	2,000
73	IRVINE - Marketing Expense	2,000
74	IRVINE - Project Coordinator	6,400

San Bernardino Symphony

75	IRVINE - Indirect Costs	7,250
	Mosaico Augment from NEA Grant	10,000
	Total IRVINE Expenses	86,000
Operating Overhead Expenses		
Guthrie Expenses		
		Net zero to income.
76	Computer Support - Guthrie	100
77	Office Expense - Guthrie	185
78	Telephone - Guthrie	1,100
79	Rent - Guthrie	1,200
80	Domain Name - Guthrie	15
81	Manager - Guthrie	
	81.1 Wages - Guthrie Mgr.	6,240
	81.2 Payroll Taxes - Guthrie Mgr.	734
	81.3 Paychex Fee - Guthrie Mgr.	770
	81.4 WC for Guthrie Mgr.	35
82	Rental Commissions - Guthrie	-
83	Shipping - FedEx - Guthrie	700
84	Music Purchase - Guthrie	200
	Total Guthrie Expenses	11,279
Insurance		
85	Worker's Comp - Office	700
86	Directors % Officer's Liability Ins.	1,747
87	Alcohol Liability	-
88	General Liability	1,824
	Total Insurance	4,271
Internet/Website Expenses		
89	AOL	-
90	Web Site Design	1,500
	Total Internet Expenses	1,500
91	Licenses/Fees	2,300
92	Membership & Dues	1,300
Merchant Fees		
93	Choice Ticketing (closed)	-
94	Credit Card Fees	500
95	Handling Charge Income	(8,000)
	Total Merchant Fees	(7,500)
96	Office Expenses/Supplies	1,800
Payroll Expenses		
Employee Salaries		
97	Executive Director	65,000
98	Operations Manager	60,000
99	Office & Event Assistance	1,560
	Fringe Benefits	46,998.10
100	Parking for ED	1,320
101	Parking & Insurance for OM	1,980
Payroll Taxes/Processing		
102	Paychex	2,500
103	Payroll Taxes - Office	10,460
	Total Payroll Expenses	189,818
104	Postage/Shipping	2,880
Professional Services		
105	Accounting	10,400
106	Audit Support / 990 Filing	2,500
107	Computer Support	500
108	Graphic Designer	10,200
	Total Professional Services	23,600

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109 Rent/Office	10,800
110 Repair & Maintenance (with rent)	-
111 E-Tapestry Donor Management	2,384
112 Telephone	3,360
113 Miscellaneous Expenses	600
Contingency	
General	<u>500</u>
Total Contingency	500
Total Operating Overhead Expenses	248,892
Other Types of Expenses	
Board Expenses	
114 Board Retreat	300
115 Cultivation Meals	-
116 Meeting Meals	1,050
117 Marketing Committee	-
118 Funds Development	750
119 Donor Cultivation & Recognition	<u>1,000</u>
Total Board Expenses	<u>3,100</u>
Total Other Expenses	<u>3,100</u>
Grand Total Expense	<u>738,499</u>

Difference between budgeted Income and Expense \$ (46,999)

San Bernardino Symphony Association
 Fiscal Year Expenses
 July 2013 through June 2014

Jul '13 - Jun 14

Cost of Goods Sold		
Concert Payroll Expense		
24 · Artist	3,600.00	
25 · Conductor	36,000.00	
26 · Conductor Mileage	310.80	
27 · Orchestra	120,214.38	
28 · Paychex Fee - Orchestra	2,644.07	
29 · Payroll Taxes - Orchestra	13,845.02	
30 · Pension Expense - Orchestra	16,375.17	
31 · Workers Comp - Orchestra	1,450.79	
32 · Stage Hands	12,856.84	
33 · Paychex Fee - Stage Hands	578.30	
34 · Payroll Taxes - Stage Hands	1,510.60	
35 · Pension Expense - Stage Hands	2,581.78	
36 · Workers Comp - Stage Hands	161.81	
37 · Stage Manager	2,990.00	
Total Concert Payroll Expense		<u>215,119.56</u>
Other Concert Expense		
Advertising & Marketing		
40 · Brochures	4,659.98	
41 · Media Advertising	6,436.73	
43 · Postcards	400.66	
44 · Program Book/Flyers	11,174.14	
Total Advertising & Marketing		<u>22,671.51</u>
46 · Archive CD's	80.31	
47 · Auditions	871.87	
48 · Concert Pictures	350.00	
49 · Concert Lecture/Notes	700.00	
51 · Special Events	3,754.30	
53 · Hotel - Conductor	1,579.60	
54 · Hotel - Artist	492.20	
55 · Music Purchase/Rental	718.85	
56 · Piano Move/Tune	2,447.98	
57 · Presentations/Awards	104.42	
58 · CA Theater Rent	22,625.00	
59 · Storage, music stands, chairs	600.00	
Total Other Concert Expense		<u>56,996.04</u>

San Bernardino Symphony Association
Fiscal Year Expenses
July 2013 through June 2014

Jul '13 - Jun 14

Contracted Concert Expenses	
60 · Contracted Concert Payroll	
60.1 · Wages - Contracted Concert	58,160.45
60.2 · Payroll Tax-Contracted Concert	6,609.87
60.3 · Pension Exp-Contracted Concert	9,652.69
60.4 · Paychex Fee-Contracted Concert	777.30
60.5 · W/C for Contracted Concerts	709.52
60.6 · Other Expenses	71.39
Total 60 · Contracted Concert Payroll	<u>75,981.22</u>
61 · Musicians in the Schools	
61.1 · Wages - MSW	9,100.00
61.2 · Payroll Taxes - MSW	1,064.26
61.3 · Pension Exp - MSW	2,063.10
61.4 · Paychex Fee - MSW	1,383.00
61.5 · MSW W/C	110.91
61.6 · Event Coordinator	845.00
Total 61 · Musicians in the Schools	<u>14,566.27</u>
62 · Trios - Musicians	
62.1 · Wages - Trios	4,192.00
62.2 · Payroll Taxes - Trios	491.60
62.3 · Pension Exp - Trios	745.23
62.4 · Paychex Fee - Trios	629.98
62.5 · W/C for Trio's	45.17
62.6 · Event Coordinator	667.40
62.7 · Other Expenses	375.12
Total 62 · Trios - Musicians	<u>7,146.50</u>
Total Contracted Concert Expenses	<u>97,693.99</u>
Total COGS	<u>369,809.59</u>
Expense	
IRVINE GRANT	
63 · Music Director & Conductor	6,000.00
64 · Musician Rehearsal Expense	21,003.66
65 · Musician Performance Expense	20,053.08
66 · Stage Manager	1,000.00
67 · Venue Rental	800.00
68 · Soloist & Folklorico Dancers	2,500.00
69 · Festival Hospitality	1,000.00
70 · Storyteller Honoraiums	550.00
72 · Community Conversation Facilita	2,000.00
73 · Marketing Expenses	538.52
74 · Project Coordinator	6,400.00
75 · Indirect Costs	7,154.74
Total IRVINE GRANT	<u>69,000.00</u>

San Bernardino Symphony Association
 Fiscal Year Expenses
 July 2013 through June 2014

Jul '13 - Jun 14

Guthrie Expenses

77 · Guthrie Office Expense	239.18
78 · Guthrie Telephone	801.50
79 · Guthrie Rent	1,200.00
80 · Guthrie Domain Name	15.00
81 · Guthrie Manager Expenses	
81.1 · Wages - Guthrie Mgr	7,350.00
81.2 · Payroll Taxes - Guthrie Mgr	707.82
81.3 · Paychex Fee - Guthrie Mgr	747.05
81.4 · W/C for Guthrie Mgr	41.09
Total 81 · Guthrie Manager Expenses	8,845.96
82 · Guthrie Rental Commissions	789.94
83 · Guthrie Shipping - Fed Ex	1,543.52
84 · Guthrie Music Purchase/Rentals	498.06
Total Guthrie Expenses	13,933.16

Insurance

85 · Workers Comp - Office	651.10
86 · Directors & Officers Liability	1,349.06
88 · General Liability	1,817.94
Total Insurance	3,818.10

Internet Expense

89 · AOL	227.88
90 · Web Site Design	2,090.50
Total Internet Expense	2,318.38

91 · Licenses/Fees	4,524.43
92 · Memberships & Dues	1,395.00

Merchant Fees

93 · Choice Ticketing Expense	72.00
94 · Credit Card Fees	4,852.77
95 · Handling Charge Income	-2,074.50
Total Merchant Fees	2,850.27

96 · Office Exp/Sup	5,827.64
---------------------	----------

Salaries

97 · Executive Director	53,770.77
98 · Director of Operations	60,000.00
99 · Office & Event Assistant	3,160.00
Total Salaries	116,930.77

Fringe Benefits

100 · Fringe Benefits ED	727.16
101 · Fringe Benefits OM	9,604.54
Total Fringe Benefits	10,331.70

San Bernardino Symphony Association
 Fiscal Year Expenses
 July 2013 through June 2014

Jul '13 - Jun 14

Payroll Taxes/Processing	
102 · PayChex	2,377.00
103 · Payroll Taxes - Office	9,745.86
Total Payroll Taxes/Processing	<u>12,122.86</u>
104 · Symphony Postage	2,658.88
Professional Services	
105 · Accounting	10,181.45
106 · Audit Support/990	3,975.00
107 · Computer Support	400.00
108 · Graphic Design	9,150.83
Total Professional Services	<u>23,707.28</u>
109 · Rent/Office	10,800.00
110 · Repair & Maintenance	60.00
111 · E-Tapestry Donor Management	2,388.00
112 · Telephone	3,466.80
113 · Miscellaneous	
Bank Charges	20.00
Contingency	-0.08
Convention Expense	1,209.14
Marketing for Contributions	1,034.00
Reconciliation Discrepancies	100.00
Reimbursed Items	-225.00
Special Program Expenses	2,646.89
113 · Miscellaneous - Other	531.31
Total 113 · Miscellaneous	<u>5,316.26</u>
Board Expenses	
115 · Cultivation Meals	77.94
116 · Meeting Meals	1,151.06
119 · Donor Cultivation & Recognition	1,369.43
Total Board Expenses	<u>2,598.43</u>
Total Expense	<u>294,047.96</u>

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 to any question in this Part IX. X

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21.				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22.				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	55,498.	23,309.	12,765.	19,424.
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.	54,478.	27,081.	14,829.	22,568.
8 Pension plan accruals and contributions (include section 401(k) and section 403(b) employer contributions).	4,264.	4,264.		
9 Other employee benefits.	8,993.		8,993.	
10 Payroll taxes.	10,101.		10,101.	
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	16,374.		16,374.	
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) amt, list line 11g expenses on Sch O.)	18,839.	18,839.		
12 Advertising and promotion	115,624.	110,102.		5,522.
13 Office expenses.	26,037.	800.	25,237.	
14 Information technology.	2,212.		2,212.	
15 Royalties.				
16 Occupancy.	15,047.		15,047.	
17 Travel.				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.				
20 Interest.				
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	5,241.		5,241.	
23 Insurance.	7,180.		7,180.	
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 Orchestra	180,998.	180,998.		
b Contracted concerts	55,416.	55,416.		
c Irvine grant	45,987.	45,987.		
d Conductor	37,070.	37,070.		
e All other expenses. See Sch. O.	87,268.	82,318.	4,950.	
25 Total functional expenses. Add lines 1 through 24e.	756,627.	586,184.	122,929.	47,514.
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).				



S.L. Gimbel Foundation Fund Grant Evaluation Form

Grant Period:

Organization: San Bernardino Symphony Orchestra

Contact Name: Dr. Anne L. Viricel

Title: Executive Director

Phone Number: 909.381.5388

Grant Period: Dec. 1, 2012 – Nov. 30, 2013

Award Amount: \$25,000

Grant Number: 2012939

- **Describe the project's key outcomes and results based on your goals and objectives. Provide the number of clients served and other relevant statistics.**

Through the 2012-13 Musicians in the Schools program, the San Bernardino Symphony worked in collaboration with the San Bernardino City Unified School District (SBCUSD) to reach over 6,500 students in 51 schools with a dynamic, standards-based music education program promoting increased cultural literacy and classical music awareness, as well as providing inspiration for engagement in school instruments music programs. Funding provided through the Gimbel Foundation made it possible to offer Musicians in the Schools to all SBCUSD elementary schools: Anderson, Anton, Arrowhead, Barton, Belvedere, Bradley, Brown, Carmack, Cole, Cypress, Davidson, Del Rosa, Emmerton, Fairfax, Gomez, Harmon, Henry, Highland-Pacific, Hillside, Hunt, Inghram, Jones, Kendall, Kimbark, Lankershim, Little Mountain, Lincoln, Lytle Creek, Marshall, Monterey, Mt. Vernon, Muscoy, Newmark, North Park, North Verdemon, Norton, Oehl, Palm, Park Avenue, Parkside, Ramona-Allessandro, Riley, Rio Vista, Roberts, Roosevelt, Salinas, Thompson, Urbita, Vermont, Warm Springs, Wilson, and Wong. Over 90% of these students are considered low- to moderate-income.

Musicians in the Schools achieved its stated goal of increasing elementary instrumental music enrollment by at least 5% in participating schools, successfully building upon our previous year's goal. The SBCUSD reported a 5.4% increase in elementary orchestra enrollment and a 5.3% increase in elementary band enrollment from the 2011-12 school year to the 2012-13 school year.

Musicians in the Schools achieved its stated goal to set the groundwork for programmatic expansion through programmatic evaluation, and documentation of goals, objectives, and procedures. We are now positioned to present a more complex program to a greater number of school facilities, including charter schools.

- **What were the challenges and obstacles you encountered (if any) in attaining your goals & objectives? How did you overcome and/or address the challenges and obstacles? What were the lessons learned?**

Planning and coordination of Musicians in the Schools, which is carried out in close coordination with SBCUSD, went very smoothly and the challenges faced, as in years past, were minimal. As has occurred in years past, however, several schools were unable to schedule the program due to construction/ renovation issues during the 2012-13 school year. In nearly all cases, these obstacles were nearly impossible to avoid; however, we are now ensuring construction schedules are consulted before the master schedule is created so that the highest possible number of schools can participate.

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

One particularly positive unintended consequence of the program was the demonstrated ability of the SBCUSD elementary music teachers to enrich their lessons to include discussions of careers in music and related fields. This year, teachers were encouraged to question Symphony musicians – all of whom are professional musicians – about the course of studies that led them to careers. This opened dialogue about traditional and non-traditional

pathways in higher education, the importance of a wide repertoire of musical styles, and the types of jobs professional musicians and those involved in the industry can expect to obtain. This further supported the District's emphasis on practical, career-based education.

In addition, our participation with the District provided the Symphony entrance to strategic planning sessions in which we were able to substantively contribute to the crafting of the SBCUSD 2013-18 Community Engagement Plan. Specifically, Musicians in the Schools relates directly to the following stated strategies:

- Strategy #2, Learning Beyond the Boundaries, Plan 2.2 which states, "Collaboration will take place between SBCUSD and higher education, trade and vocation, and the business and professional community to create pathways to college and career."
- Strategy #4, High Expectations for All, Plan 4.1 which states, "Authentic and meaningful relationships between the District, schools, families and the business community will be developed."
- Strategy #6, College and Careers, Plan 6.4 which states, "Create an infrastructure that supports development, quality, and sustainability of college and career pathways."

- **Describe the overall effect this grant has had on your organization.**

The overall effect this grant has had on our organization is extremely positive. In challenging economic times for San Bernardino, our educational initiatives have allowed us to embrace a leadership opportunity within our community, working closely with the SBCUSB to promote the arts and arts engagement among youth, and connecting students with tangible opportunities for their artistic and personal development. Each year this program is offered builds a greater depth of understanding and appreciation for music, both in our local youth and in those whose lives they touch. As an organization, we are encouraged by the increasing number of young people and families attending our performances and recognize this grant as one of the most vital to the long-term success of our organization.

- **Tell us a few success stories that made an impact on your organization and/or community as a result of this grant.**

Each year, we interview both teachers and students who have participated in Musicians in the Schools. This year, we spoke to Ana, a young violinist, who told us she was drawn to the study of orchestral music when her mother moved her from the Corona-Norco Unified School District to San Bernardino City Unified so she could participate in the music program.

"I had been exposed to music, but never thought it was something I could participate in," she told us.

Ana recalls being fascinated by the ability of the musicians. But mostly, she remembers the thrill of picking up her instrument for the first time. It wasn't long after that, through diligent practice, she worked her way to first chair violin in the Chavez Middle School orchestra. Later, as a member of the orchestra, she travelled to elementary schools to perform for the students.

"You could see the enthusiasm on their faces. It was very touching and I thought about how I had been inspired as a young student," she said.

That inspiration and the lessons learned through her musical study, Ana believes, has made her a better student.

"I definitely believe playing music has helped me get through many things academically," she shared. "Playing music requires self discipline because you have to know how to fix things and respond to situations. For instance, if you are playing in a group and you hear someone out of tune, you have to adjust what you are doing to stay together as a group."

Ana's talent and skill were nurtured by her relationship with the Symphony. She has been able to pursue her passion for music partly because of the Symphony's on-going partnership with the San Bernardino City Unified School District.

We also spoke with SBCUSD elementary music educator Judy Nowlin who shared her thoughts about the program.

"I cannot begin to tell you what an important program Musicians in the Schools is for my students," she told us. "Many have already chosen their instruments, so this program solidifies their choices and provides an example of professional musicianship that each can strive to emulate. In addition, I am always impressed by the increasing level of excellence in the programs provided and the patient, methodical way in which the visiting musicians address student questions. They learn and so do I."

- **Provide a financial report on the use of your grant funds (expenditures).**

A financial report is attached.

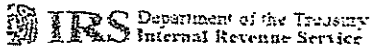
- ❖ Please send copies of publicity and other promotional materials.
- ❖ All variances or time extensions must be approved by The Community Foundation's Grant Committee. Please contact us at 951-684-4194, ext. 114 immediately if a variance or extension becomes necessary.

Please return the completed form to:

Celia Cudiamat

3700 Sixth St., Suite 200, Riverside, CA 92501

Or email to: ccudiamat@thecommunityfoundation.net



OGDEN UT 84201-0046

In reply refer to: 0424060201
July 21, 2004 LTR 252C
95-6153923 000000 00 000
93611
BODC: TE

SAN BERNARDINO SYMPHONY ASSOCIATION
1811 N D ST
SN BERNRDNO CA 92485-5909117



Taxpayer Identification Number: 95-6153923

Dear Taxpayer:

Thank you for the inquiry dated June 08, 2004.

We have changed your business name as requested. The number shown above is valid for use on all tax documents. For your convenience, we have ordered corrected Forms 8109, Federal Tax Deposit Coupons, for you to make your deposits. You should receive them in five to six weeks. REMINDER - Your new business name should also be used if you deposit electronically. You can make Electronic Funds Transfer (EFT) payments using the government's Electronic Federal Tax Payment System (EFTPS) through a financial agent designated to process tax payments.

If you have any questions, please call us toll free at 1-877-829-5500.

If you prefer, you may write to us at the address shown at the top of the first page of this letter.

Whenever you write, please include this letter and, in the spaces below, give us your telephone number with the hours we can reach you. Also, you may want to keep a copy of this letter for your records.

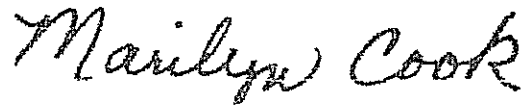
Telephone Number () _____ Hours _____

Thank you for your cooperation.

0424060201
July 21, 2004 LTR 252C
95-6153923 000000 00 000
03612

SAN BERNARDINO SYMPHONY ASSOCIATION
1811 N D ST
SN BERNRDNO CA 92405-3909117

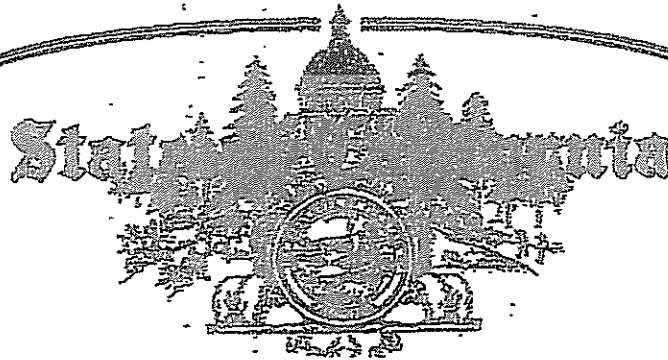
Sincerely yours,

A handwritten signature in cursive script that reads "Marilyn Cook".

Marilyn Cook
Dept. Manager, Code & Edit/Entity 3

Enclosure(s):
Copy of this letter

A0583311

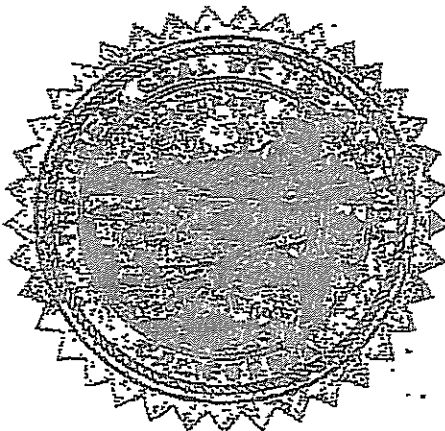


SECRETARY OF STATE

I, **BILL JONES**, Secretary of State of the State of California, hereby certify.

That the attached transcript of 1 page(s) has been compared with the record on file in this office, of which it purports to be a copy, and that it is full, true and correct.

IN WITNESS WHEREOF, I execute this certificate and affix the Great Seal of the State of California this day of



JUL 9 8 2002

Bill Jones

Secretary of State



U. S. TREASURY DEPARTMENT
INTERNAL REVENUE SERVICE

DISTRICT DIRECTOR
P. O. BOX 231
LOS ANGELES, CALIFORNIA 90031

September 25, 1967

IN REPLY REFER TO
Form L-178
Code 414 HJG
LA-EO-67-874

San Bernardino Symphony Association
P. O. Box 2312
Uptown Station
San Bernardino, California 92406

PURPOSE Charitable, Educational	
ADDRESS INQUIRIES & FILE RETURNS WITH DISTRICT DIRECTOR OF INTERNAL REVENUE	
Los Angeles	
FORM 990-A RE- QUIRED	ACCOUNTING PERIOD ENDING
<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	June 30

Gentlemen:

On the basis of your stated purposes and the understanding that your operations will continue as evidenced to date or will conform to those proposed in your ruling application, we have concluded that you are exempt from Federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code. Any changes in operation from those described, or in your character or purposes, must be reported immediately to your District Director for consideration of their effect upon your exempt status. You must also report any change in your name or address.

You are not required to file Federal income tax returns so long as you retain an exempt status, unless you are subject to the tax on unrelated business income imposed by section 511 of the Code, in which event you are required to file Form 990-T. Our determination as to your liability for filing the annual information return, Form 990-A, is set forth above. That return, if required, must be filed on or before the 15th day of the fifth month after the close of your annual accounting period indicated above.

Contributions made to you are deductible by donors as provided in section 170 of the Code. Bequests, legacies, devises, transfers or gifts to or for your use are deductible for Federal estate and gift tax purposes under the provisions of section 2055, 2106 and 2522 of the Code.

You are not liable for the taxes imposed under the Federal Insurance Contributions Act (social security taxes) unless you file a waiver of exemption certificate as provided in such act. You are not liable for the tax imposed under the Federal Unemployment Tax Act. Inquiries about the waiver of exemption certificate for social security taxes should be addressed to this office, as should any questions concerning excise, employment or other Federal taxes.

This is a determination letter.

Very truly yours,

F. S. Schmidt
District Director

You are cautioned that upon dissolution your remaining assets must be distributed to an organization described in section 501(c)(3) of the Code and exempt from Federal income tax.

FEDERAL
October 12, 1983

The Inland Empire Symphony
Association
P.O. Box 2312
San Bernardino, CA 92406

Department of the Treasury

P.O. Box 2350 Los Angeles, CA 90053

Person in Contact: T. Ciolek

Telephone Number: (213) 688-4152

Refer Reply to: EP/EO EOG:2:tc

Date: October 12, 1983

Gentlemen:

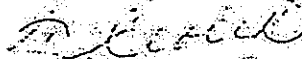
This is to acknowledge receipt of your letter dated September 23, 1983 regarding the determination letter for the above organization.

We do not up-date determination letters, however, our records do show that in September 1964, The Inland Empire Symphony Association, was held to be exempt from Federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code and classified as an organization that is not a private foundation as defined in section 509(a) of the Code because it is an organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

The exemption letter issued to you in September 1964 continues to be in effect.

Thank you for your cooperation.

Sincerely,



T. Ciolek
Revenue Agent

STATE

Inland Empire Symphony
Artistic and Administrative Development



Phone (916) 355-0392

October 12, 1976

In reply refer to
344:RTF:OS:gp

San Bernardino Symphony Association
c/o Mrs. Lee
P.O. Box 2312
San Bernardino, Ca. 92406

Purpose: Educational & Charitable
Form of Organization: Corporation
Accounting Period Ending: June 30
Organization Number: 477584

This letter confirms your previous exemption from State franchise and income tax under Section 2370ld, Revenue and Taxation Code. In confirming your exempt status, we have made no examination of your current activities. If the organization has changed its operation, character, or purpose since exemption was originally granted, that change must be reported immediately to this office.

You are still required to file Form 199 (Exempt Organization Annual Information Return) or Form 199B (Exempt Organization Annual Information Statement) on or before the 15th day of the 5th month (4-1/2 months) after the close of your accounting period. See annual instructions with forms for requirements.

You are not required to file state franchise or income tax returns unless you have income subject to the unrelated business income tax under Section 23731 of the Code. In this event, you are required to file Form 109 (Exempt Organization Business Income Tax Return) by the 15th day of the 3rd month (2-1/2 months) after the close of your annual accounting period.

Contributions made to you are deductible by donors as provided by Sections 17214 through 17216.2 and 24357 through 24359 of the Code, unless your purpose is testing for Public Safety.

A handwritten signature in cursive script that reads "Jim Giroud".

Jim Giroud
Supervisor
Exempt Organizations

INLAND EMPIRE SYMPHONY ASSOCIATION HISTORY

Symphony Established	January 1961
Incorporation Date	September 1, 1964
Form of Organization	Corporation
Organization Number	D-0477584
Taxpayer ID Number	95-6153923
Exempt Code	501(c)(3)
Purpose	Educational and Charitable

**NOTE: 1996 - Changed name to San Bernardino Symphony Orchestra
to identify with local area**

Internal Revenue Service

Date: August 12, 2004

San Bernardino Symphony Association
1811 N D ST
SN Bernrdno, CA 92405-3903

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

Person to Contact:
Ms. Dalton 31-07967
Customer Service Representative
Toll Free Telephone Number:
8:00 a.m. to 6:30 p.m. EST
877-829-5500
Fax Number:
513-263-3756
Federal Identification Number:
95-6153923

Dear Sir or Madam:

This is in response to your request of August 12, 2004, regarding your organization's tax-exempt status.

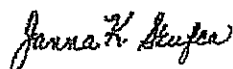
In September 1967 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

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,



Janna K. Skufca, Director, TE/GE
Customer Account Services

SAN BERNARDINO SYMPHONY ORCHESTRA

July 27, 2014

The Community Foundation
Ms. Celia Cudiamat
3700 6th Street #200
Riverside, CA 92501

Re: S.L. Gimbel Foundation Fund Application

Dear Ms. Cudiamat,

Thank you for the opportunity to apply for the 2014 S.L. Gimbel Grant. We recognize only a limited number of invitations were extended and are proud to have been counted among those organizations selected to apply.

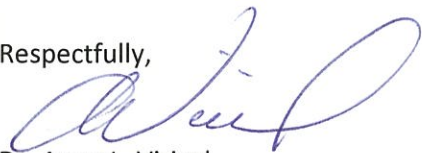
Our grant application once again focuses on our Musicians in the Schools program. This year, the program has been extended to include a greater number of schools in line with the additional facility openings in the San Bernardino City Unified School District. We have also substantially expanded the scope of the program's educational reach through the addition of preparatory learning platforms provided to participating instructors and follow-up worksheets to allow those instructors to continue a related dialogue back in the classroom.

We believe these changes will measurably strengthen the educational value of the program.

In addition, over the last year, the San Bernardino Symphony Association has carefully reviewed and reevaluated how we recognize the organizations gracious enough to include us in their funding schedules. To extend our thanks for the past participation of The Community Foundation, we have included your organization's logo in our 2014/15 annual brochure (enclosed) which is distributed to over 10,000 homes and businesses, as well as on our website, and in all seasonal subscription concert public relations pieces, posters, and print advertising. We sincerely apologize for any previous years' oversight that did not appropriately include The Community Foundation.

We believe the enclosed application has been prepared to your specifications; however, should any questions arise, we would welcome the opportunity to address them.

Respectfully,



Dr. Anne L. Viricel
Executive Director

FRANK FETTA
Music Director/Conductor

JUDITH VALLES
President, Board of Directors

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Executive Director

198 N. Arrowhead Ave.
San Bernardino, CA 92408
www.sanbernardinosymphony.org
T 909/381-5388 F 909/889-7954



The Community Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

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President and CEO

Dr. Anne L. Viricel
Executive Director

San Bernardino Symphony Orchestra Association
198 N. Arrowhead Ave.
San Bernardino, CA 92408

Dear Dr. Viricel:

Congratulations! A grant has been approved for **San Bernardino Symphony Orchestra Association** in the amount of **\$25,000** from the S.L. Gimbel Foundation. The **performance period for this grant is November 1, 2014 to October 31, 2015**. 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:

Musicians in the Schools: Enhance the quality and comprehensiveness of music education in the San Bernardino City Unified School District through the Musicians in the Schools program.

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

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. The **Grant Evaluation is due by November 16, 2015** 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 951-684-4192 ext. 114 or email me at ccudiamat@thecommunityfoundation.net.

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

6664 San Bernardino Symphony Orchestra

20140741

GIMBEL



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

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.

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.

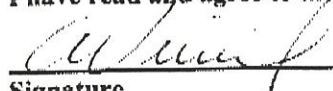
8. Termination

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

12/18/14
Date

Anne L. Viricel
Printed Name

Executive Director
Title

Organization: 6664 San Bernardino Symphony Orchestra Association
Grant Number: 2014074


12/18/14



The
Community
Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

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Dr. Jonathan Lorenzo Yorba
President and CEO

December 18, 2014

Dr. Anne L. Viricel
Executive Director
San Bernardino Symphony Orchestra Association
198 N. Arrowhead Ave.
San Bernardino, CA 92408

Dear Dr. Viricel:

The Community Foundation is pleased to enclose a grant check for **\$25,000** from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned. The completed Grant Evaluation form is due by November 16, 2015 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.

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

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

20140741

38389

GIMB4



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

The Community Foundation

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

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38389
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PAY * Twenty-Five Thousand and no/100 *

TO THE ORDER OF

DATE 11/13/2014 AMOUNT \$****25,000.00

San Bernardino Symphony Orchestra Association
 198 N. Arrowhead Ave.
 San Bernardino, CA 92408



Eric Anderson
Jonathan Lorenzo Yabe
 AUTHORIZED SIGNATURE

⑈038389⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

38389

6664	San Bernardino Symphony Orchestra Association	11/13/2014	038389	
20140741	11/10/2014 Musicians in the Schools			25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		25,000.00	

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

The Community Foundation

38389

6664	San Bernardino Symphony Orchestra Association	11/13/2014	038389	
20140741	11/10/2014 Musicians in the Schools			25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		25,000.00	

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