

 <p>The Community Foundation Serving Riverside and San Bernardino Counties</p>	<p align="center">S.L. Gimbel Foundation Fund Grant Evaluation Form</p>
<p>Grant Period:</p>	<p align="center">1/1/2013 to 6/30/2013</p>

Organization: Tri-Coastal Community Outreach, Inc

Contact Name: Carolyn Thompson

Title: Executive Director

Phone Number: 228-623-0017

Grant Period: January, 2013 – June, 2013

Award Amount: \$9,000

Grant Number: 20121028

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

Over the last 6 months our service numbers at our center has continued to come down, however our service area has amplified, which has increased the total weekly numbers we serve. As the news reports that the economy is getting better, it has been hard for the people at the bottom to see. Many of our younger clients are returning to work only to accept jobs that pay a lot less than they are accustomed to receiving. Seniors continue to report children, grandchildren and other extended family members needing to move in, thus deferring plans of downsizing. We have seen an escalation for affordable housing due to declines in income levels. We have served 14,669 people from January – June 30th with 40% of the upsurge coming from the surge in our new service area with an intensification of fresh fruits, and vegetables purchased from local farmers.

- **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?** There were no challenges only the opportunity to serve.
- **Describe any unintended positive outcomes as a result of the efforts supported by this grant.**

As a result of your gracious funding amount, we are able to maintain prior levels of supplies offered to families while offering the same to new families in additional areas. \$164,503 of food was able to be leveraged in-part with the grant received, added two new partnerships and have been able to grow capacity for volunteers. We have developed a relationship with Chiquita that allowed us to leverage funding and directly receive over 17,000 pounds of fresh bananas, and pineapples over the last 6 months.

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

As funding sources had lessen for many direct service organizations, finding supporters who continue to help community based agencies serve poor underserved communities is rare. The funding that you provided has been the bridge between being able to provide adequate amounts of food to supplement families who were on the brink of deciding which members to or not to feed over the last 6 months. The grant award was placed in local newspapers on our Website and Facebook.

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

There are always many stories we could tell, however I would like to highlight one family that represents so many here on the Gulf Coast.

Rene is a 72 year old retired court stenographer. After working 30+ years for the county, she and her husband decided to retire and enjoyed their golden years. Bill 77, had served in the armed forces for 23 years and worked as a policeman for 21 years. Both suffer with many health illnesses. They have 2 children and 3 grandchildren. Their only son lost his job, his wife and then his home. He and the three grandchildren were forced to move home with mom and dad. At first it seemed an ok thing until Bill found out that the retirement plan that he thought was in the bag was never coming. The city had not paid into the plan, even though he had paid into what he believed was his retirement. And, with another glitch Bill is not receiving any money from the military either. The son had no job and the only income quickly became Rene's pension, which is \$557 per month. After about 8 months groceries and reserves became nonexistent. In November of last year, Rene decided to ask around to see if she could get extra help. She received \$413 in food stamps and even that did not cover the amount needed to feed 6 people and 3 of them growing teenagers, two of them boys 16 and 13. In December she decided to take a neighbors advice and stop by Tri-Coastal. She did not explain her full situation at that time only that she was in dire need of food. She was processed as other families are. She was given food for the month and the children were enrolled in our Christmas assistance program and school supply distribution. She was directed to our Thrift Store for school uniforms that cost \$2-\$4 for each piece. Rene did not know that Tri-Coastal had received a \$9,000 grant that would enable us to offer her fresh fruits, vegetables, frozen meats, canned goods, fresh bread and cleaning supplies over the next 6 months, but volunteered her professional services to contribute and do whatever she could to help others and deflect her attention from the problem that she felt was hopeless. Her skills of typing have been invaluable.

So, I submit this report to The Gimbel Foundation with great admiration because Rene's family is only one of the many here on the Gulf Coast of Alabama and Mississippi who have been greatly impacted by the funding that became lifesaving.

And, Tri-Coastal is so grateful for your dedication to helping those in need and helping us to help others.

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

Line Item	Line Item Description	Amt. Rec'd	Amt. Spent
Jan. 2013: Purchase of Food Items	4 Tons of Fresh produce foods. Canned and dry goods (veg and meats)	9,000.00	\$ 993.41
Feb: 2013 Purchase of Food Items	14,701 lbs of canned goods Frozen meats and Fresh Fruits Fresh produce		\$1,593.66
Mar 2013: Purchase of Food	Frozen, Canned foods, fresh fruits and Vegetables		\$ 1,209.63
April 2013: Purchase of Food	Frozen meats, Canned and Dry Foods, Fresh Fruit		\$ 2,133.15
May 2013: Purchase of Food Items	Frozen meats Canned goods		\$ 845.19
June 2013: Purchase of Food	Frozen meats, dry foods, canned goods and fresh produce		\$ 876.14
	Total		\$7,651.18
	Line Item Description	Amt. Rec'd	Amt. Spent
Transportation of Food Items Dates: Over 6 month period, Jan – June	Pick up and Distribution of 4,820lbs of Fresh Banana's from Chiquita Warehouse	\$1,000.00	\$1,101.00
Salary/Warehouse manager	Keeps inventory database of food income and distribution	\$500.00	\$500.00
	Total Amount Requested	\$9,000.00	\$9, 252.18

- ❖ Please send copies of publicity and other promotional materials, if available.

July 16, 2013

Jonathan Yorba
Executive Director, Community Foundation of Riverside/San Bernardino Counties

Hi Jonathan,

Thanks for thinking of me relative to assisting with the Give Big Riverside campaign! Although it sounds like there are a few challenges with the departure of a couple of key people on the committee and time being of the essence, I have some ideas about how to best help you stay on track with the GB Action Plan (see attached) and make the community connections we discussed.

Becky Foreman facilitated creation of the Action Plan, has worked on Give Big in the past, and has professional relationships with the committee members, so I would bring her in to assist me at no additional cost if you move forward with what I would propose. So below I have two scenarios – the first is for the plan oversight/facilitation of GB, the second is for community outreach consulting.

Coordination/Facilitation of GB

After considering the variables and what you are looking for, I would suggest the following:

1. **Facilitation of two GB Full Committee meetings.** We will provide facilitation of an immediate meeting, assembled quickly, of the full GB committee to review/recap progress made on the Action Plan by respective work groups per the calendar created, re-evaluate the composition of the work groups given the loss of a couple of key people, get updates on any blocks or new issues that may need to be addressed within the work groups (this is a common thing along the way), and set up a bi-monthly meeting schedule for all workgroups. We will act as point person for questions/concerns from each group work lead person. In this way we know what each group is up to or what respective challenges they may be having and have some possible solutions. This information, in turn, would be communicated to the overall coordinator (see more on this position later). The work group leads will continue to be responsible for sending out the meeting notices and act as spokesperson for the group.
2. **Facilitation of up to 30 bi-monthly Work Group meetings.** We will attend and facilitate all individual bi-monthly workgroup meetings (Infrastructure, Money, Non-profit Engagement, Outreach and Partnerships, Marketing) to facilitate implementation planning for each subsequent two-week interval.
3. **Facilitation of Final Full Committee meeting prior to November 12 Give Big Event in Late October.**
4. **Consult in Non-Profit Engagement and Outreach and Partnership workgroups** relative to asset mapping, brainstorming ideas as to the outreach approach, identification of groups with which to connect, and on a limited scale

as needed contact initial connection of committee member to specific individuals or groups identified.

Compensation

Items 1, 2, and 3 above will be billed on a set fee of \$600.00 per meeting occurrence and will include documentation following each meeting, delivered to respective work group leaders with cc to you, as well as provision and facilitation of report-outs on completed action items/milestones at each meeting and consulting as needed on approaches that may need some assistance. Note that some of the work groups may already have completed their task or are close to it which will eliminate the necessity for as many meetings.

Item 4 would be on an as-needed basis and at an hourly rate of \$85.00 not to exceed 20 hours per month total. Becky and I would assist work groups relative to our respective expertise.

Jonathan, finally, after some thought, I believe it is important as far as the community engagement piece that committee members that are involved in the effort and have a lot of passion around it be "the face of Give Big" when reaching out to the community. At the end of the day, for a most robust GB in the future, the committee members -- most if not all of them affiliated with non-profits -- must establish those community relationships. It is all part of that social capital building that is really key to GB in the long run sustainability of the program and also creates buy-in and accountability on the part of those involved. That is critical. And then those relationships will need to be nurtured over time so that with each passing year, GB grows and grows. As you well know, relationships are key, and all of the community building research supports this approach.

I use as an example of how this can work the recent Action Plan we provided for Habitat for Humanity's 25th Anniversary Celebration. I was initially asked by Karin to be the event planner for that event, but I suggested an Action Plan much like GB that would harness the energy and wisdom -- and buy-in -- of the board, the staff, and key volunteers. Habitat is using that strategy, and it is working great. Habitat's event, approached in this manner, has resulted beautifully with the entire year being inclusive of that 25th Year Celebration that was up coming. Becky and I have facilitated that "movement" on a regular basis, much like I am proposing here, while it still had an internal overall coordinator. Having me as an outsider coming in at this point to coordinate and be perceived as the voice of GB in the community would be counter-productive and even possibly take the wind out of the sails of the planning group. I would suggest that part of this process would be inclusion of some local non-profits being approached to make a one-time pitch to certain community groups that have similar goals or passions making GB and "the ask" more relevant to that group.

The job of the overall coordinator under this scenario is that of a sort of ringleader acting as the point person for communications from the work groups and is not a

highly time intensive position, so that person could in all likelihood be culled from your existing committee.

Finally, I really believe that the route I propose is best to keep the momentum going and maintain the enthusiasm and commitment of the team throughout the journey. One critical goal this year is also to create that synergy so that the program can be sustained and replicated effectively in subsequent years without having to reinvent the wheel each time! I know that the concern is time, but there is a commitment there by the folks involved, and I truly believe this can be accomplished. I think if a "call to arms" meeting comes from you, they will respond and we can get moving forward quickly and effectively with renewed vigor!

Call me if you have any questions so we can discuss. Look forward to hearing from you!

Eva

About the ToP facilitation methods used:

Our approach and methods are based on the Technology of Participation (ToP™), a trademark of the Institute of Cultural Affairs (ICA), and emphasize participation, creativity, teamwork, and action. Numerous case studies have shown how the methods of the ToP have helped to transform corporations, government institutions, nonprofit organizations, small businesses and whole communities. I was trained on the methods in 2004 and 2005 by Linda Hamilton for use within the context of community work. I also spent five weeks last summer in Chicago working with the ICA-USA.

Program Associate

Job Title: Program Associate
Department:
Reports To: Executive Vice President
FLSA Status: Non-exempt
Prepared By: Karen Lampert
Prepared Date: July 17, 2013
Approved By:
Approved Date:

Summary

Essential Duties and Responsibilities include the following. Other duties may be assigned.

Responsibilities/ Grants and Scholarships:

- Manage grant application process (collect, sort, list, document, post applications, collect and document grant reports). Current complete grant cycles include Community Impact, Field of Interest, Idyllwild Community Fund and Youth Grantmakers.
- Process grant denial and award letters, grant agreements and grant award checks for all grant cycles.
- Provide check processing and record keeping support for Gimbel grant cycles.
- Assist grantees with basic information, follow up on missing grant or scholarship information; check with college/university financial aid offices on missing scholarship checks
- Exercise due diligence in performing searches for new grantee viability (501©3 status)
- Create and maintain grant files to meet legal, audit and TCF requirements
- Attend internal (and occasional external) grant committee meetings, providing support in decision making process
- Assist with occasional site visits to potential grantees, report findings to VP of Grant Programs, Donor Services and Administration.
- Maintain grant and scholarship information on website as liaison between TCF and webmaster and/or Communication Specialist.
- Manage and maintain online grant application processes.
- Provide customer service, while facilitating the grant check issuance process, tracking the request from receipt through check issuance.
- Support the effective monitoring of grant making to ensure compliance with regulatory standards and terms and conditions of fund agreement.
- In collaboration with VP Grant Programs, Donor Services and Administration, develop information packets for new and existing donors based on type of fund (donor advised, endowment, agency, scholarships, etc.) to support the growth of grant and scholarship funds.
- In collaboration with and in support of the VP Grant Programs, Donor Services and Administration, formulate and monitor Donor Services program
- Provide donors with high quality service by being responsive and providing access to services and information as needed

Responsibilities/Programs:

- Provide assistance with the development of curriculum, session content and scheduling for all the Youth Philanthropy Initiative programs (Youth Grantmakers).
- Serve as an advisory to the Riverside YGC program: attend monthly meetings, coordinate reminders and notices to students, liaison with schools for recruitment of new students, prepare materials for meetings, and coordinate student site visits and presentations by nonprofits.

Program Associate

- Serve as the lead coordinator for the Idyllwild Youth Grantmakers program: coordinate with school and administrative staff, coordinate and liaison with Idyllwild Community Fund for support and participation; facilitate sessions and provide for post assessment and evaluation of program.
- Prepare grant materials and monitor applicants for all the Youth Philanthropy Initiatives granting cycles (currently Youth Grantmakers and Idyllwild Youth Grantmakers).
- Assist in the development and coordination of a Youth Grantmakers Alumni Giving Circle.
- Assist in the stewardship of funds to grow the Youth Philanthropy Initiative.
- Manage social media and communications with YGC members.
- Coordinate year end Grantee Award and Recognition Ceremony.
- Assist in the development of the Yearbook/Newsletter, brochures and ancillary PR materials for the Youth Philanthropy Initiative.

Responsibilities/Special Projects.

- **Give BIG:** Provide primary communication and coordination with taskforce members to ensure action items and committees are completing assigned tasks and activities for the campaign. Act as lead contact with Razoo (third party technology platform provider) for coordination of service provider contract, giving day platform, training and nonprofit participation. Liaison with TCF staff for continued oversight and management of the Give BIG campaigns.
- **Funders Alliance:** Provide administrative assistance to Chair and workgroup committees through the distribution of emails, coordination of meeting schedules, reminders and attendance. Assist with the development and distribution of materials, research and items of interest as needed and requested.

Responsibilities/ General:

- Process Donor Advised and Agency Fund disbursement requests (including annual distributions).
- Respond to inquiries for information by providing appropriate information or directing the inquiry to appropriate staff member
- Provide regular and ad hoc reports of donor, grantee, grant/scholarship information as needed for staff and board members.
- Work with other staff of the Community Foundation on special programs and other projects that promote awareness of the Foundation and community philanthropy as needed.
- Assist as needed with the coordination of tasks and responsibilities for student program interns.

Supervisory Responsibilities: This job has no supervisory responsibilities.

Competencies: To perform the job successfully, an individual should demonstrate the following competencies. (Place an X in front of each that is needed):

Analytical_- Synthesizes complex or diverse information; Collects and researches data; Uses intuition and experience to complement data; Designs work flows and procedures.

Design - Generates creative solutions; Translates concepts and information into images; Uses feedback to modify designs; Applies design principles; Demonstrates attention to detail.

Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.

Project Management - Develops project plans; Coordinates projects; Communicates changes and progress; Completes projects on time and budget; Manages project team activities.

Technical Skills - Assesses own strengths and weaknesses; Pursues training and development opportunities; Strives to continuously build knowledge and skills; Shares expertise with others.

Program Associate

Customer Service - Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments.

Interpersonal Skills - Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.

Oral Communication - Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions; Demonstrates group presentation skills; Participates in meetings.

Written Communication - Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information.

Visionary Leadership - Displays passion and optimism; Inspires respect and trust; Mobilizes others to fulfill the vision; Provides vision and inspiration to peers and subordinates.

Change Management - Develops workable implementation plans; Communicates changes effectively; Builds commitment and overcomes resistance; Prepares and supports those affected by change; Monitors transition and evaluates results.

Leadership - Exhibits confidence in self and others; Inspires and motivates others to perform well; Effectively influences actions and opinions of others; Accepts feedback from others; Gives appropriate recognition to others.

Quality Management - Looks for ways to improve and promote quality; Demonstrates accuracy and thoroughness.

Business Acumen - Understands business implications of decisions; Displays orientation to profitability; Demonstrates knowledge of market and competition; Aligns work with strategic goals.

Cost Consciousness - Works within approved budget; Develops and implements cost saving measures; Contributes to profits and revenue; Conserves organizational resources.

Diversity - Demonstrates knowledge of EEO policy; Shows respect and sensitivity for cultural differences; Educates others on the value of diversity; Promotes a harassment-free environment; Builds a diverse workforce.

Ethics - Treats people with respect; Keeps commitments; Inspires the trust of others; Works with integrity and ethically; Upholds organizational values.

Organizational Support - Follows policies and procedures; Completes administrative tasks correctly and on time; Supports organization's goals and values; Benefits organization through outside activities; Supports affirmative action and respects diversity.

Strategic Thinking - Develops strategies to achieve organizational goals; Understands organization's strengths & weaknesses; Analyzes market and competition; Identifies external threats and opportunities; Adapts strategy to changing conditions.

Judgment - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.

Motivation - Sets and achieves challenging goals; Demonstrates persistence and overcomes obstacles; Measures self against standard of excellence; Takes calculated risks to accomplish goals.

Planning/Organizing - Prioritizes and plans work activities; Uses time efficiently; Plans for additional resources; Sets goals and objectives; Organizes or schedules other people and their tasks; Develops realistic action plans.

Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.

Program Associate

Quality - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.

Quantity - Meets productivity standards; Completes work in timely manner; Strives to increase productivity; Works quickly.

Safety and Security - Observes safety and security procedures; Determines appropriate action beyond guidelines; Reports potentially unsafe conditions ; Uses equipment and materials properly.

Adaptability - Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to deal with frequent change, delays, or unexpected events.

Attendance/Punctuality - Is consistently at work and on time; Ensures work responsibilities are covered when absent; Arrives at meetings and appointments on time.

Dependability - Follows instructions, responds to management direction; Takes responsibility for own actions; Keeps commitments; Commits to long hours of work when necessary to reach goals.; Completes tasks on time or notifies appropriate person with an alternate plan.

Initiative - Volunteers readily; Undertakes self-development activities; Seeks increased responsibilities; Takes independent actions and calculated risks; Looks for and takes advantage of opportunities; Asks for and offers help when needed.

Innovation - Displays original thinking and creativity; Meets challenges with resourcefulness; Generates suggestions for improving work; Develops innovative approaches and ideas; Presents ideas and information in a manner that gets others' attention.

Qualifications To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience: Bachelor's degree (B. A.) from four-year college or university; or one to two years related experience and/or training; or equivalent combination of education and experience.

Language Skills: Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

Mathematical Skills: Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

Reasoning Ability: Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Computer Skills: To perform this job successfully, an individual should have knowledge of Database software; Internet software; Project Management software; Spreadsheet software and Word Processing software.

Physical Demands The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Program Associate

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this Job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms and talk or hear. The employee is occasionally required to walk and stoop, kneel, crouch, or crawl.

Work Environment The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

I have read and understand the functions outlined in this description. I understand these duties can be modified, changed or deleted at anytime by management, with or without prior notification. I am able to perform these functions, with or without reasonable accommodation.

Print Name

Date

Signature

Karen Lampert

From: carolyn@tricoastalcommunity.org
Sent: Monday, July 15, 2013 12:41 PM
To: Penny Beaulieu
Subject: Gimbel Foundation Evaluation July 2013

Hi Penny,

P.S. extra: For outreach in action,
Tri-Coastal will be featured on ABC's Secret Millionaire, Sept. 1, 2013. Tag: Mobile, Alabama

Carolyn

Karen Lampert

From: carolyn@tricoastalcommunity.org
Sent: Monday, July 15, 2013 12:35 PM
To: Penny Beaulieu
Subject: Gimbel Foundation Evaluation July 2013
Attachments: Gimbel Grant Evaluation July 2013.doc

Hello Penny

I hope this email finds you well.
Please see grant evaluation attached.

Thanks,
Carolyn