



2018 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant No: <u>20192106</u>

Organization / Agency Information

Organization/Agency Name: Yavapai Big Brothers Big Sisters, Inc. (YBBBS)		
Physical Address: 3208 Lakeside Village Dr., Prescott, AZ 86301		
Mailing Address: 3208 Lakeside Village Dr., Prescott, AZ 86301		
CEO or Director: Erin Mabery		Title: Interim CEO/President
Phone: (928) 778-5135	Fax:	Email: emabery@azbig.org
Contact Person: Carol Henderson-Dahms		Title: Grant Administrator
Phone: (928) 380-8899	Fax:	Email: chendersondahms@azbig.org
Web Site Address: www.azbig.org		Tax ID: 86-0278776

Program / Grant Information

Interest Area: Animal Protection Education Environment Health Human Dignity

Program/Project Name: Strengthening School-Based Mentoring Programs in Yavapai County AZ			Amount of Grant Requested: \$24,000.00
Total Organization Budget: \$1,493,076 Current 990	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 82%	Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): 11%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 18%
Purpose of Grant Request (one sentence): Support for 20 at-risk youth age for participation in YBBBS elementary and middle school-based mentoring programs within five participating Yavapai County AZ school districts.			
Program Start Date (Month and Year): 2/1/2019		Program End Date (Month and Year): 1/31/2020	
Gimbel Grants Received: List Year(s) and Award Amount(s) Gimbel Grant 2015-2016, awarded \$21,819.00			

Signatures

Board President / Chair: (Print name and Title) Jason J. Gisi - Sec	Signature: 	Date: 12/14/18
Executive Director/President: (Print name and Title) ERIN MABERY, INTERIM PRESIDENT/CEO	Signature: 	Date: 12-13-18

Internal Use Only:
Grant No: _____

Organization / Agency Information

Organization/Agency Name: Yavapai Big Brothers Big Sisters Inc		
Physical Address: 3208 Lakeside Village Drive Prescott, AZ 86326		
Mailing Address: 3208 Lakeside Village Dr. Prescott AZ 86326		
CEO or Director & Title: Ms Erin Maberry, Interim CEO/President		
Phone: (928) 380-8899 (Carol) (928) 778-5135 (Main office/Erin)	Fax: (928) 445-8909	Email: emaberry@azbig.org
Contact Person & Title: Carol Henderson-Dahms, Grant Administrator		
Phone: (928) 380-8899	Fax:	Email: chendersondahms@azbig.org
Web Site Address: http://www.azbig.org		Tax ID: 86-0278776

Program / Grant Information

Program Area: Education

Program/Project Name: Strengthening School-Based Programs in Yavapai County AZ			Amount of Grant Requested: \$24,000
Total Organization Budget: \$1,493,076	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 82%	Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): 11%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 18%
Purpose of Grant Request (one sentence): Support of YBBBS school-based mentoring programs within five participating Yavapai County AZ school districts			
Program Start Date (Month and Year): 2/1/2019 TBD		Program End Date (Month and Year): 1/31/2020	
Gimbel Grants Received: List Year(s) and Award Amount(s) Gimbel Grant 2015-2016, awarded \$21,819.00			

2018 S.L. Gimbel Foundation Fund APPLICATION

Narrative

I. Organization Background

Yavapai Big Brothers Big Sisters (YBBBS) provides children facing adversity with strong and enduring, free of charge, professionally supported one-to-one relationships that change their lives for the better, forever. YBBBS has been serving youth, ages 5-17, in Yavapai County since 1971.

Organizational Accomplishments:

Over the years, YBBBS has received numerous national awards for our impact, as well as our effectiveness in changing the lives of youth. For example, in 2014, YBBBS received the High Performance in Quality Award from BBBS of America. (This exclusive award is given to BBBS agencies that serve a minimum of 150 children in one year, have a 12-month retention rate for community matches of at least 64% and for school matches of at least 41%, and have a match support contact rate of at least 90%.) YBBBS is in the top 1% nationally of all BBBS programs for the number of children matched per capita. Most recently YBBBS was named the Top Charity in Arizona by Business.org out of over 24,513 non-profits in Arizona (see website at www.azbig.org for more information). In the past 3 years (2014-2017) we served 1,051 children. So far in 2018, we have served 570 children and we are on track to serve approximately 650 youth by the end of the year.

Program Activities:

YBBBS matches children, most of whom live in single-parent homes, live below the poverty level and are considered at-risk, with caring volunteer Big Brothers/Sisters/Couples/Families. For children and families in rural parts of Yavapai County, YBBBS's mentoring program is often the only professional support system they have. There has been a local population boom over the past two decades—Yavapai County, AZ has a population of 218,586 people with a median age of 51.9 and a median household income of \$46,638. Between 2015 and 2016 the population of Yavapai County, AZ grew from 215,996 to 218,586, a 1.2% increase and its median household income grew from \$44,748 to \$46,638, a 4.22% increase. However, the incidence of poverty has also grown and approximately 14.7% of families living in Yavapai County are at or below the poverty level.

YBBBS's long-term, professionally supervised, one-to-one matches help the Littles overcome poverty-induced disadvantages and achieve their potential. YBBBS facilitates both community- and school-based mentoring programs in 20 communities across Yavapai County, including 65 schools, most of which are in rural settings. Currently, we have 434 children actively matched with mentors and another 166 on our waiting list. Since 1971, YBBBS has facilitated mentorship for more than 11,000 at-risk youth.

II. Project Information:

A) Statement of Need

Research has proven time and again that poverty adversely affects children, and poverty across Yavapai County has become a dire problem. Low academic achievement and social disconnectedness are nagging contributors to the cycle of poverty, and recent cuts to school funding only stand to make matters worse in the future. YBBBS's partnership with the five participating school districts (Prescott, Humboldt, Chino Valley, **Clarkdale-Jerome**, and Chino Valley USD) will allow some of the district's neediest children to be matched with a responsible, well-educated mentor, which statistics show could make all the difference in these children's lives.

B) Project Description

We currently work with a number of school districts within our county. However, some of these partnerships would benefit from additional support, and we have identified one school district with whom we would be developing a school-based program (**Clarkdale-Jerome USD**), **a reservation bordering school district**. The school-based collaborations will allow the identified school districts and YBBBS to change the lives of at-risk elementary and middle school youth, giving them the chance to successfully reach their potential, complete high school, graduate from college and become productive community members.

School districts refer children in need of mentoring, then professional YBBBS staff interview and screen each child and her or his family. Meanwhile, YBBBS staff recruits and rigorously screens

prospective volunteer mentors (Bigs), then trains those who have been carefully selected. Youth are matched with the most suitable Big, with special attention given to aligning the Big's career path with the Little's career aspirations. The pair begins meeting for one hour per week, at the school, to develop a supportive relationship and work on academic and developmental activities pertinent to the child's needs. YBBBS professional staff support and monitor each Little/Big relationship for the duration of the match, which lasts the length of the school year and, in many cases, much longer.

C) Project Goal, Objectives, Activities & Expected Outcomes

Project Goal:

The school-based mentoring program will allow participating Yavapai County school districts and YBBBS to change the lives of at-risk elementary and middle school youth, giving them the chance to successfully reach their potential, complete high school, graduate from college and become productive community members.

Project Objectives:

Identify and match 20 at-risk elementary and middle school youth from schools within participating school districts in Yavapai County to participate in a school-based mentoring program during the project period of one year.

Program Activities:

YBBBS matches children, most of whom live in single-parent homes, live below the poverty level and are considered at-risk, with caring volunteer Big Brothers/Sisters/Couples/Families. For children and families in rural parts of Yavapai County, YBBBS's mentoring program is often the only professional support system they have. There has been a local population boom over the past two decades—Yavapai County, AZ has a population of 218,586 people with a median age of 51.9 and a median household income of \$46,638. Between 2015 and 2016 the population of Yavapai County, AZ grew from 215,996 to 218,586, a 1.2% increase and its median household income grew from \$44,748 to \$46,638, a 4.22% increase. However, the incidence of poverty has also grown and approximately 14.7% of families living in Yavapai County are at or below the poverty level.

YBBBS's long-term, professionally supervised, one-to-one matches help the Littles overcome poverty-induced disadvantages and achieve their potential. YBBBS facilitates both community- and **site-based** mentoring programs in 20 communities across Yavapai County, including 65 schools, most of which are in rural settings. **For 114 years, the Big Brothers Big Sisters mentoring model has been to match one youth with one adult volunteer in a long-term mentoring relationship. In our Community-Based Mentoring Program, adult mentors (Bigs) and youth (Littles) do activities together in the community. They might attend a sporting event, grab pizza, do an art project, or visit a museum. Each match decides when, where, and how often they will meet during the month, but in keeping with the approximate 8 hours per month as research recommends is the optimum frequency to promote positive outcomes. In our School-Based Mentoring Program (also called site-based), Bigs and Littles meet at the Little's school or in another structured environment on campus for approximately one hour per week. They might play on the playground, do homework, shoot hoops, do STEM activities, or read a book together.** Currently, we have 434 children actively matched with mentors and another 166 on our waiting list. Since 1971, YBBBS has facilitated mentorship for more than 11,000 at-risk youth.

Expected Outcomes:

We expect to positively impact 20 elementary and middle school youth who participated in a YBBBS school based mentoring program during the course of the project and see improvements in the academic performance of mentored students and in their beliefs in their own scholastic efficacy.

Evaluation:

Two main measures will support the evidence of success of the project: The Strength of Relationship survey (SOR), is an indicator of the overall quality of matches, assesses the strength of the Little-Big relationship. The SOR, given at 3 months, helps the match advisor provide strategic support to the

individuals while providing information to improve the quality of services to matches to ensure longer, stronger matches. The indicator of success will be a minimum of 4.5 post score on the survey given pre/post program participation.

The Youth Outcomes Survey (YOS) is administered to youth prior to the match and at the end of each school year. It measures scholastic competence, social acceptance, educational expectations, grades and parental trust. An increase in all descriptors of the post-YOS instrument will help to serve as evidence of success of the program in providing high quality matches and positively impacting Littles.

Additionally, other tracking and measurement mechanisms include duration of the match and anecdotal feedback gleaned during monthly calls with the Little and her/his parent/guardian.

Superintendents will provide evidence of academic achievement for their students in the school-based program, and teachers/counselors will provide qualitative anecdotal stories about the success of the program as well.

D) Timeline

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

This program can begin implementation immediately upon receipt of funds. Timeline is as follows: Months 1-3: Establish or reestablish partnerships with identified five school districts to outline an on-site school-based mentoring program. Ramp up marketing and recruitment of Big Brothers and Sisters utilizing the new logo; Screen prospective Bigs (application, home interview, background check, etc.); Outreach to all schools in the participating five districts to identify youth in need of a school based mentor; Administer pre-match Youth Outcome Survey with all youth prior to matching; Begin matching identified youth with school-based Bigs; Months 4-6: Continue recruitment efforts and recruit additional prospective Bigs; Continue to match waiting youth to screened Bigs; Months 7-12: Continue volunteer recruitment efforts and facilitate additional matches; Coordinate summer activities every 3-4 weeks to maintain Little/Big relationships; Present to school principals about the outcomes of the school based mentoring program and referring vulnerable youth for following school year.

E) Target Population

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

The grant will serve at-risk elementary and middle school children attending schools in the Prescott, Humboldt, Chino, Camp Verde, and Cottonwood/Oak Creek Unified School Districts. A grant of \$24,000 will fund the establishment and support of 20 Little/Big matches, allowing us to positively impact the lives of 20 Littles and their families, and 20 Bigs. The children will be ages 5-14, from single-parent or other-than-parent homes and living at or below the poverty level living in Yavapai County AZ.

F) Projects in the Community

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

YBBBS is the primary mentoring agency in Yavapai County and is the only agency facilitating long-term, free of charge, one-to-one, professionally supervised mentoring relationships. YBBBS works closely with elementary and middle schools in the county to identify children in need of mentors. Additionally, we partner with high schools to identify both at-risk underclassmen in need of mentors and responsible upperclassmen who might serve as teen mentors to younger children. The Bigs, who have hands-on contact with the families, often become the social service resource referral. The Big Brothers Big Sisters model is entirely dependent on the commitment of volunteers who each give several hours of their time every month to meet with their Little Brother or Sister. We also recruit Bigs from law enforcement (Bigs in Blue program), fire, and forestry. Recently we applied to an OJJDP sponsored training and technical assistance program to receive support in working with other organizations serving youth in our county. This multi-system training will allow us to work with child welfare, juvenile justice, and other non-profits in addressing the needs of at risk youth and their families living in Yavapai County AZ.

G) Use of Grant Funds

How will you use the grant funds?

Grant funds will be used to support 20 matches between at risk youth (Little) and adult mentors (Bigs) from five participating school districts (Prescott, Humboldt, Chino Valley, **Clarkdale-Jerome**, and Cottonwood) through a school based mentoring program. **While all YBBBS services are free to families, there is a cost to our professionally supported matches, including costs for interviewing the volunteer, checking references, enrolling the Little, creating an optimal match based on personality and interests, and supporting the match by connecting with the Little, the Big, and the parent on a consistent basis to offer ideas to strengthen the relationship and troubleshoot problems. As a Big Brothers Big Sisters of America affiliate, we must also have funding to cover not only the matching process, but also volunteer recruitment, local office administration, youth outcomes analysis, and volunteer and staff training. The breakdown of the \$1200.00 per match is as follows: \$70.00 for recruitment of a potential Big (typically there are 3 applicants for every 1 who is matched); \$380.00 is for personal interviews at the applicant's home (may be required if the Big would like to see the Little during the summer – this match type is called school-based plus), federal fingerprinting, reference checks, drivers license check, and criminal history check; \$295.00 supports a Match Advisor to complete a required home visit if necessary, a child and parent interview, and collateral contact with teachers, counselors, probation officers, and absent parents, etc.; \$385.00 is the typical amount to ensure the match is the very best match possible. This includes supervising and supporting the match (monthly phone calls to the parent/guardian, child and volunteer, 6 month and yearly in person evaluations); \$30.00 is allocated for activities for fun for the Big and Little to experience together (annual picnic, other events provided by YBBBS for all matches); and \$40.00 for insurance to cover both Bigs and Littles during the first year, totaling the requested \$1200.00 per match. The average length of time per match relationship varies, and the above represents the initial financial support necessary to initiate the match and on-going professional match support it for one year. Due to a recent changeover in our agency-wide database system (SalesForce), and change in accounting system from Abila to Quickbooks, we now have a method by which to track specific grant expense by match. In addition, a full-time grant administrator will be in charge and provide oversight in regards to the implementation, evaluation, financial, and reporting requirements to any future projects. It is our intent to provide impact data to our funders post-project, including return on investment.**

III. Project Future

A) Sustainability

Establishing and supporting academic-focused Little/Big matches in the identified partnering school district service area is an important part of our work and we strategically seek funding partners to support this program. We continually make asks of potential tax-credit donors and Matchmakers (donors who give \$1,200 to support one match for one year) and we allocate some of the funding from our annual fundraising events—Bowl for Kids' Sake, Grand Gala Dinner and Auction, and a golfing event—for this program.

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

A) Governance

The board is comprised of 25 prominent community leaders who actively participate in bi-monthly meetings and board committees, including: finance & audit, fund development, board development, strategic planning, executive committee, Grand Gala planning and Bowl for Kids' Sake planning. The board is led by an executive committee, strives for consensus building and is guided by a 5-year strategic plan.

B) Management

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

The School-based program is overseen by a team of professional match advisors. These YBBBS staff members each hold a bachelor's degree in social services or a related field and have two or more years of experience in mentoring or social services work. The team reports to the YBBBS program director, who provides high-level oversight and strategic direction for the program. In addition, YBBBS has a grant administrator who oversees the grant process from submission, financial and interim reporting, and post-award closeout and summative reporting. Furthermore, superintendents will hold a significant role in the implementation of this project through providing outreach and training to their staff, counselors, and teachers who will provide the referrals for at-risk youth for this program. We value them in our partnership in the running of this critical endeavor.

2018 S.L. Gimbel Foundation APPLICATION

Organization Name:
Yavapai Big Brothers Big Sisters

V. Project Budget and Narrative (Do not delete these instructions on your completed form).
 A) Budget Table: Provide a detailed line-item budget for your entire project by completing the table below.
 Requested line items should be limited to Ten (10) line items. The less the better.
 A breakdown of specific line item requests and attendant costs should include:
 1) Line item requests for materials, supplies, equipment and others:
 a. Identify and list the type of materials, supplies, equipment, etc.
 b. Specify the unit cost, number of units, and total cost
 c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each= \$4000)
 2) Line item requests for staff compensation, benefits: Do not use FTE percentages
 a. Identify the position; for each position request, specify the hourly rate and the number of hours (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
 b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)
 3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above: Provide rate of pay per hour and number of hours.
 4) Line Item Description should be no more than two lines; otherwise, it will get cut off. Additional descriptions should be included in the Budget Narrative.

Line Item Request	Line Item Description (Maximum two lines)	Support From Your Agency (30%)	Support From Other Funders (20%)	Requested Amount From Gimbel/TCF (50%)		Line Item Total of Project	Math Check
\$15.40/hr X 8 hrs./week X 50 weeks X 2 MAs	Match Support (2 match advisors MAs to provide 4 hrs/week match support svcs)	3696.00	2464.00	6160.00		12320.00	12320.00
\$16.58/hr X 6 hrs./week X 50 weeks X 1 Recruiter	Recruitment of Bigs/Littles	1492.20	994.80	6161.00		4974.00	4974.00
\$17.00/hr X 6.5 hrs./each interview X 40 Interviews	Enrollment and background checks of Bigs (2 interviews for 2 Bigs at 6.5 hrs./each)	1326.00	884.00	2210.00		4420.00	4420.00
\$22.11/hr X 4 hrs./week X 50 weeks X 1 project admin.	Project oversight and supervision/monitoring and reporting	1326.60	884.40	2211.00		4422.00	4422.00
Total Fringe Benefits \$26,136 X 25%	Employee Benefits at 25%	1960.20	0.00	4573.80		6534.00	6534.00
Marketing materials	Marketing mats - Recruitment pkgs. \$400.00; rack cards \$800/2k; 684.20 radio	684.20	0.00	1884.20		2568.40	2568.40
40 packets@ \$20.00/ea	Recruitment-Training packets for Bigs/Parents of Littles @\$20.00 each.	0.00	0.00	800.00		800.00	800.00
					36038.40		
TOTALS:		10485.20	5227.20	24000.00		36038.40	36038.40

B) Narrative: The budget narrative is the justification

Match Support (2 match advisors MAs to provide 4 hrs/week match support svcs -child safety): \$15.40/hr X 8 hrs./week X 50 weeks X 2 Match Advisors

Recruitment of Bigs/Littles: \$16.58/hr X 6 hrs./week X 50 weeks X 1 Recruiter

Enrollment and background checks of Bigs (2 interviews for 2 Bigs at 6.5 hrs./each): \$17.00/hr X 6.5 hrs./each interview X 40 interviews (conducted by Enrollment specialists)

Project oversight and supervision/monitoring and reporting: \$22.11/hr X 4 hrs./week X 50 weeks X 1 project admin. (conducted by Grant Administrator)

Employee Benefits at 25%: Total Fringe Benefits - \$26,136 X 25%

Marketing materials - School-based Recruitment pkts.(flyers, applications) \$400.00; rack cards \$800/2k; 684.20 local radio

Recruitment-Training packets for Bigs/Parents of Littles: \$20.00 each. X 40 packets

B) Narrative: The budget narrative is the justification of "how" and/or "why" a line item helps to meet the project deliverables. Provide a description for each line item request as necessary. Explain how the line item relates to the project. If you are requesting funds to pay for staff, list the specific duties of each position. See attached SAMPLE Project Budget and Budget Narrative

Match support: 800 hrs @ 15.40/hr: Provides supervision and ongoing contact with Bigs/Littles and their families and supports the match with professional mentoring program practices.

Recruitment: 300 hrs @16.58/hr: Recruitment activities to find qualified volunteers (Bigs) for school based programs. This would include advertising and working with the school districts to find qualified Bigs who meets YBBBS Standards and meet all federal and state background checks.

Enrollment: 40 Interviews @17.00/hr @6.5 each interview: Enrollment specialists schedule and interview potential volunteers and complete all necessary background checks (DMV, fingerprinting, sex offender registry, etc.).

Grant oversight: 200 hrs @22.11/hr.: Grant administrator to provide on-going program monitoring and reporting. Acts as a liason to make sure all grant requirements are being met and in a timely manner.

Employee Benefits: \$20,386.00 *25%: Employee fringe benefits as supported by the agency.

Big/Little Packets: 20 packets @\$20.00/each: Packets describing the program and all hard copy paperwork for complete information in becoming a volunteer (Big) and participant (Little). Includes information about supporting training for both Bigs and Littles, for example pre match training for Bigs.

Liability Insurance: 5% of total budget: Insurance required to support each Big/Little match annually.

Indirect expense: de minimis rate @ 10%: Established indirect rate for agency.

2018 S.L. Gimbel Foundation APPLICATION

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
OJJDP - Subaward from BBBSA	\$65,000.00
Arizona Community Foundation	\$4,800.00
APS Community Giving	\$11,500.00
Wells Fargo	\$ 2,500.00
	\$
	\$
	\$
	\$

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Arizona Community Foundation	\$ 10,000.00	10/31/18
Margaret T. Morris Foundation	\$ 117,000.00	12/31/18
OJJDP - Subaward from BBBSA	\$ 101,544.00	12/31/18
Wells Fargo	\$ 15,000.00	11/15/18
IMentor.org	\$ 65,000.00	11/1/18
	\$	

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	\$470,000.00	32 %	Program Fees	\$0	0 %
Fundraising/Special Events	\$ 395,000.00	26 %	Interest Income	\$	%
Corp/Foundation Grants	\$382,330.00	26 %	Other:	\$10,000.00	1 %
Government Grants	\$220,777.00	15 %	Other:	\$	%

Notes:

--

2018 S.L. Gimbel Foundation APPLICATION

VII. Financial Analysis

Agency Name: Yavapai Big Brothers Big Sisters

Most Current Fiscal Year (Dates): From 7/1/2015 To: 6/30/2016

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

Form 990, Part IX: Statement of Functional Expenses

1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$ 1,525,850.00	\$ 1,250,625.00	\$ 165,672.00	\$ 109,553..

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

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	82 %	10.9 %	7.1 %

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

Percentage of Organization’s Current Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
11%	10.9 %	< 1 %

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

Yavapai Big Brothers Big Sisters 2018 FY Budget

REVENUE	FY18 Budget
Community Giving-Unrestricted	
Individual Contributions	470,000
Event Sponsorships	100,000
Corporate Contributions	67,000
Foundation	231,300
YBBBS Foundation	24,000
Indirect/Affiliated Organizations Revenue	10,000
Total Community Giving	902,300
Grants-Restricted	
Government Grants	220,777
Foundation	25,000
Other Grants	35,000
Total Grants	280,777
Investments	
Interest	0
Dividends & Interest - Endowment Accts	
Unrealized Gain (Loss)	
Gain/(Loss) on Disposition of Assets	
Total Investments	0
Fundraising Events	
Event Income	375,000
LESS Event Direct Costs	(80,000)
Total Fundraising Events	295,000
Other Income	
Rent Income	
Total OTHER INCOME	0
Total REVENUE	1,478,077

EXPENSES	FY18 Budget
Personnel Expenses	
Salaries & Wages	
Officers & Directors Salaries	85,000
Employee Wages	859,761

Yavapai Big Brothers Big Sisters 2018 FY Budget

Total Salaries & Wages	944,761
Payroll Benefits & Taxes	
ER Pension Plan Contributions	13,816
EE Benefits (Not Pension)	108,421
ER Payroll Taxes	72,274
Workers' Comp	4,809
Total Payroll Benefits & Taxes	199,320
Consultants/Professional Fees	
Accounting Fees	10,500
Grant Writing Fees	8,000
Legal Fees	2,500
Professional/Consulting Fees	2,500
Professional/Graphic Design	5,000
Temporary Help - Contract	7,000
Vista/AmeriCorp Fees	12,000
Outside Computer Services	12,000
Total Consultants/Professional Fees	59,500
Total Personnel Expenses	1,203,581
	FY18 Budget
Non-Personnel Expenses	
Operating & Office	
Supplies & Materials	9,500
Postage & Shipping	11,000
Mailing/Billing Services	7,500
Printing & Copying - In House	14,500
Printing & Copying - Outsourced	23,000
Dues & Subscriptions	1,700
Bank & Credit Card Fees, Interest	10,000
Licenses	200
Info Technology & Computer Exp	12,000
Telephone & Telecommunications	9,500
Total Operating & Office	98,900
Occupancy & Equipment	
Rent/Occupancy	2,400
Utilities	10,000
Building Repairs & Maintenance	7,500
Mortgage/Note Interest	2,795
Equipment Rental & Maintenance	12,000

Yavapai Big Brothers Big Sisters 2018 FY Budget

Total Occupancy & Equipment	34,695
	FY18 Budget
Travel & Meetings	
Travel	3,000
Mileage Reimbursements	19,000
Conferences, Meetings	4,500
Total Travel & Meetings	26,500
Agency, Program, Recruit, Mktg	
Advertising Expenses	7,500
BBBSA Affiliation & AIM Fees	15,600
Insurance (Non-EE Related)	27,000
Recruitment	3,000
Program Expense	3,000
Staff Exp & Development	2,000
HR Advertising	2,500
Intake Expense	6,600
Volunteer Expense	1,200
Scholarship	1,000
Total Agency, Program, Recruit, Mktg	69,400
Fund Development	
Donor Gifts & Meals	12,000
Bad Debt Expense	
Total Fund Development	12,000
Total Non-Personnel Expenses	241,495
Reserve Accrual	48,000
Total EXPENSES	1,493,076
Operations Surplus (Deficit)	(14,999)

2015-16 Gimbel Grant - Actual Budget									
Line Item Description	Line Item Explanation	Support From YBBBS	Support From Other Funders - Actual	Requested Amount From TCF	Proposed Line Item Total of Project	Amount Received from TCF - Actual	Total Project Expenditure - Actual		
Candy McKeown 400 hrs x \$15.40	Annual Match Support	\$ 2,080.00	\$	\$	\$ 6,160.00	\$ 3,027.37	\$	\$	5,177.76
Rosa Vargas 400 hrs x \$15.40	Annual Match Support	\$ 2,080.00	\$	\$	\$ 6,160.00	\$ 3,027.37	\$	\$	4,931.20
Michael Smith 300 hrs x \$16.58	Annual Recruitment	\$ 1,784.00	\$ 500.00	\$	\$ 4,974.00	\$ 2,445.53	\$	\$	4,974.00
Paul Medlyn 40 interviews 6.5hrs per	40 Interviews x \$17 p/Hr x 6.5hrs per	\$ 1,540.00	\$ 490.00	\$	\$ 4,420.00	\$ 2,172.80	\$	\$	4,420.00
Lisa Sahady 100 hrs @ \$22.11	Annual Supervision	\$ 1,160.00	\$	\$	\$ 3,316.00	\$ 1,628.23	\$	\$	3,316.00
Employee Benefits	\$20,386 x 25%	\$ 2,188.00	\$ 690.00	\$	\$ 6,258.00	\$ 3,072.83	\$	\$	5,704.74
Facilities(rent, utilities, EQ, Communications)	Usage by grant assigned staff \$37,900 occupancy x 8%	\$ 1,060.00	\$ 332.00	\$	\$ 3,032.00	\$ 1,490.96	\$	\$	3,032.00
Intake Expense	Increase matches by 50%-20 x \$160 intake expense	\$ 1,117.00	\$ 355.00	\$	\$ 3,200.00	\$ 1,570.96	\$	\$	4,000.00
Liability Insurance	Match Ratio-5% of total budget	\$ 472.00	\$ 149.00	\$	\$ 1,351.00	\$ 663.66	\$	\$	1,351.00
Travel	Match Ratio-5%	\$ 385.00	\$ 121.00	\$	\$ 1,100.00	\$ 540.02	\$	\$	1,100.00
Program Supplies	Big & Little packets\$20x20	\$ 140.00	\$ 44.00	\$	\$ 400.00	\$ 196.37	\$	\$	400.00
Indirect costs	De Minimis rate-10%	\$ 1,402.00	\$ 454.00	\$	\$ 4,037.00	\$ 1,982.79	\$	\$	4,037.00
TOTALS:		\$ 15,408.00	\$ 5,000.00	\$	\$ 44,408.00	\$ 21,818.88	\$	\$	42,443.70

Approximately 52% of actual project costs were covered by the foundation through the grant (\$21,819).

Other costs expended included facilities(rent, utilities, EQ, Communications) with usage by grant assigned staff at \$37,900 occupancy x 8%. Liability and travel covered expended 5% of the total budget of \$44,408. Also included in grant implementation costs were program packets, which were informational packets for both the teachers as well as school personnel. These packets were \$20.00 each, and 20 of them were created and shared. The agency provided additional packets already prepared and paid for so no additional charges are listed for the 5 additional matches. A packet is available upon request. The agency also included an indirect rate cost at 10%.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	85,179.0	69,847.	7,666.	7,666.
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	756,743.	620,529.	68,107.	68,107.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	89,170.	73,120.	8,025.	8,025.
10 Payroll taxes	71,163.	58,353.	6,405.	6,405.
11 Fees for services (non-employees):				
a Management				
b Legal	2,971.		2,971.	
c Accounting	11,375.		11,375.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If the 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	154,798.	149,556.	5,242.	
12 Advertising and promotion	6,259.	6,259.		
13 Office expenses				
14 Information technology				
15 Royalties				
16 Occupancy	2,499.	2,374.	125.	
17 Travel	21,045.	21,045.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	4,183.	4,183.		
20 Interest	1,418.	950.	397.	71.
21 Payments to affiliates	16,402.	16,402.		
22 Depreciation, depletion, and amortization	29,524.	19,781.	8,267.	1,476.
23 Insurance	24,243.	20,607.	2,424.	1,212.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24a amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a				
b				
c				
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	1,525,850	1,250,625.	165,672.	109,553.
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)				