



**2022 S.L. Gimbel Foundation  
Fund  
Grant Application**

Internal Use Only:
Grant _____

**Organization / Agency Information**

1) Organization/Agency Name: <b>Santa Rosa Plateau Nature Education Foundation (SRPNEF)</b>		
2) Physical Address: <b>39400 Clinton Keith Road</b>		City/State/Zip <b>Murrieta, CA 92562</b>
3) Mailing Address: <b>P. O. Box 941</b>		City/State/Zip <b>Murrieta, CA 92564</b>
4) CEO or Director: <b>Ginger Greaves</b>		Title: <b>Executive Director</b>
5) Phone: <b>909-732-2209</b>	6) Fax:	7) Email: <b>execdirector@srpnef.org</b>
8) Contact Person: <b>Same as above.</b>		Title:
9) Phone:	10) Fax:	11) Email:
12) Web Site Address: <b>www.srpnef.org</b>		13) Tax ID: <b>71-0946697</b>

**Program / Grant Information**

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

14) Program/Project Name: <b>Promoting Environmental Protection Through Education (PEPE)</b>			15) Amount of Grant Requested: <b>\$46,767.00</b>
16) Total Organization Budget: <b>\$305,673</b>	17) Per 990, Percentage of Program Service Expenses (Column B / Column A x 100): <b>83.6%</b>	18) Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): <b>16.4%</b>	19) Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): <b>0</b>
20) Purpose of Grant Request (one sentence): <b>To promote environmental protection by educating high school students about the changes in biological life cycles.</b>			
21) Program Start Date (Month and Year): <b>August 1, 2022</b>		22) Program End Date (Month and Year): <b>August 1, 2023</b>	
23) Gimbel Grants Received: List Year(s) and Award Amount(s) <b>2011/\$13,000, 2012/\$15,000, 2014/\$20,000, 2016/. \$25,000</b>			

**Signatures**

24) Board President / Chair: (Print name and Title) <b>Austin Linsley, President</b>		Date: <b>3.30.22</b>
25) Executive Director/President: (Print name and Title) <b>Ginger Greaves, Executive Director</b>		Date: <b>3.20.22</b>

## **2022 S.L. Gimbel APPLICATION Narrative**

Please provide the following information by answering **ALL** questions (I to IV), **12 Font, One Inch Margins, Times New Roman**. Use the format below (I to IV). **Type the question**. Type your complete answers to the question directly below the question. Please be thorough, clear, specific, and concise.

### **I. Organization Background**

#### **A) What is the history, mission and purpose of your organization?**

History - SRPNEF has been providing and supporting nature and environmental education programs for 19 years. Formed in 2003 to sustain an elementary outdoor education program at the Santa Rosa Plateau Ecological Reserve (Reserve), SRPNEF's programs have expanded to serve students in grades 3-12, developed a nature education resource network and events for teachers and outdoor education providers, and established a scholarship fund for graduating seniors who will be continuing their education in the fields of environmental sciences.

Mission – To educate and empower youth to appreciate, protect and preserve nature.

Purpose – Create a new generation of environmental stewards by supporting and providing programs, projects and experiences that guides our young citizens towards a life of environmental stewardship.

#### **B) How long has the organization been providing programs and services to the community?**

Incorporated May 1, 2003.

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

1. 2019 – Major accomplishment - hiring a Nature Education Programs Manager
2. 2020 – Major revision and adjustment to strategic plan in response to two catastrophic events. Tenaja Fire that altered access of for school programs and the public to the Reserve and COVID which altered/cancelled all education programs and fundraising.
3. 2021 - Nature education programs were modified because of the COVID mandates with the development of the Hawks, Rocks & Nature Talks YouTube Channel; production of three educational videos that were distributed to school districts and students served by SRPNEF. Organization was sustained and staff remained in place with board support and good financial oversight although operating budget was slashed over 50%. Reserve funds were in place to sustain the organization while it worked to be ready for resumption of all education programs and fundraising activities. Office and storage space for exclusive use by SRPNEF was also acquired at the Reserve in 2021 through negotiations with Riverside County Regional Park and Open Space District.

#### **D) What are your key programs and activities?**

- Third Grade Outdoor Education – On site at Reserve
- Third Grade – Title I Schools Outreach (in classroom)
- 4<sup>th</sup> Grade Trout-in-the Classroom -
- 5<sup>th</sup> Grade Native Seed Bank Studies
- Middle School Grassland Restoration (grades 6-8)
- High School Watershed (Steelhead Trout Study)

- College Scholarships – Graduating Seniors/Study Environmental Sciences
- Nature Education Resource Workshops – Teachers / Outdoor Educ Providers
- Distance Learning Nature Education Videos
- Hawks Rocks & Nature Talks YouTube Channel
- Community Family Wildlife Day events

**E) Describe the communities you serve. Include populations, geographic locations served, and relevant statistics.**

**Communities Served:**

Ten school districts in Southwest Riverside County – Temecula, Murrieta, Wildomar, Menifee, Perris, Lake Elsinore, Hemet, San Jacinto, Romoland and Corona

Number of students: Over 8,500 per year grades 3-12

Number of Schools: 95

Number of Classrooms: 300

Population: All students. Concentrated effort to reach out to schools with higher percentage of minority, disabled and low-income families/students.

**II. Project Information:**

**A) Statement of Need**

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

The 2019 United Nation’s Report on Climate Change reported that around one million animal and plant species are now threatened with extinction, many within the next decade, more than ever before in human history. The Report refers to this threat as the “6<sup>th</sup> extinction crisis.” This Report directly attributes the loss of biodiversity and habitats to climate change. Therefore, SRPNEF believes, now more than ever, there is an immediate and crucial need to educate our young citizens, specifically high school students, about the impact of climate change on biological life cycles. It is important they understand that the changes are occurring now more rapidly, and how possible it is to mitigate these changes to maintain the habitability of our planet for **all** life forms and thus protection of the environment. The study of these changes and life cycles is known as the “Study of Phenology”.

To educate and equip our youth with tools to confront this challenge a concentrated, ongoing, phenological study of cyclic and seasonal natural phenomenon as it relates to climate change and habitat loss is vitally needed. This would be done as an on-site field program to observe, research, study, record and analyze changes occurring in a variety of plant, animal species and habitats. Through this activity an understanding of the importance of protecting via ways to repair the damage, and reverse degradation trends, can be developed. In the process the students will become inspired to pursue professional and/or personal pathways of environmental stewardship. The activity/program is not a one-time site observation visit, but an on-going extended period of that can be used for future study and land management.

## **B. Project Description**

### **1. Describe your project. How does your project meet the community need?**

#### **Name of Project - Promoting Environmental Protection through Education (PEPE)**

- Project will involve the establishment of a collaborative community science program known as a Local Phenology Program (LPP) through the USA National Phenology Network. By establishing an LPP, we will have access to an online resource and software program provided by Nature's Notebook. This program not only provides guidance and training to engage the students, and the community, in studying, understanding and monitoring the biological changes, but provides the open database to record findings that are then available to other LLPs, biologists, researchers and associated scientists throughout the United States.

The observation and field work sites must be located in places like wildlife refuges, local and national parks and ecological reserves across the country. An organization that hosts an official Nature's Notebook effort for an LPP is known as a Local Phenology Leader (LPL). SRPNEF proposes to become an LPL. Students and classroom teachers will then be engaged and trained by SRPNEF to enter and analyze the data from their field work and observations.

- SRPNEF will confirm access to sites with priority on the Santa Rosa Plateau Ecological Reserve. Other protected habitat areas will also be identified, and access will be requested.
- Two local high school classes of diverse students will be identified and engaged for the project. The classroom teachers would be an integral component for planning and follow-up classroom content. The teachers would accompany students on all field-work trips. Each class would study different areas/habitats/plants, but the sites would be consistent each year.
- To understand the effects of climate change on the biological life cycles, one must also begin to understand climate itself. We believe these two subjects - the study of the biological changes and the study of climate - must go together. Therefore, the project will include the use of a recent invention called the "PocketLabAir". The device, about the size of a large cell phone, is compact and user-friendly enough to put the power of learning about climate in the hands of the next generation. It is wireless, multi-functional and remote-ready. The device helps the student(s) investigate the air quality in a community or study area and produces research-quality results. It can empower a citizen scientist by making climate change personal and involves the students in gathering real-world information.
- Ideally, we envision small groups of 3-4 students, with daypacks, binoculars, PocketLabs, iPads and materials to complete their observations and record keeping. It will be important to have cohesive groups as there could be student absences that could affect the data gathered. Each group will need to be well-trained to utilize their groups past observations if there is a change in the group members.
- To create a sustainable field work and monitoring program, we must decide on the question to be answered with the data to be gathered. For example, would the class monitor life cycle changes of a single species (e.g., monarchs) or select multiple species (e.g., monarch and milkweed) to study community changes. This will become part of

the planning and discussions with the classroom teacher to better help them augment the program activity and content with their environmental science requirements.

The most effective and sustainable Nature's Notebook monitoring programs are designed to meet a known goal. How to determine the goal of the monitoring; what is the monitoring need for this area, will be accomplished with the help of a "Needs Assessment" guided by Nature's Notebook. SRPNEF will also be engaging the land managers at the Santa Rosa Plateau Ecological Reserve as to monitoring needs.

## **2. What is unique and innovative about this project?**

SRNEF's "PEPE" program will be unique to Riverside County in that we could find no similar programs or such activity for high school students. In addition, each student will come to understand the data they gather and enter will be contributing to a national database used by scientists and researchers. That data is used to help them with appropriate land management plans for habitat preservation and restoration benefiting wildlife and native plants in the long run. From that they will come to understand the impact of their work even as a high school student.

The project will provide place-based, hands-on learning opportunities, using a collaborative, national platform for site-based educators; it will promote cross-subject engagement while addressing standards of learning. Phenology is an excellent lens for teaching high school students about the natural world and engaging them in the issues of environmental protection.

Another unique aspect of the program, is that field-work sites on the protected lands are currently understaffed and do not have the personnel resources to engage in the gathering of the important information.

### **WRITE YOUR RESPONSES HERE AND Use the following format for your goal, objective, respective activities and expected outcome:**

**GOAL:** Promote environmental protection through Phenology education to high school students.

**OBJECTIVE:** Engage 60 high school students in four Phenology field work trips including at least 6 software training sessions with teachers and students within one school year.

#### **ACTIVITIES:**

1. Establish a Local Phenology Plan in conjunction with the Nature's Notebook platform within the USA National Phenology Network.
2. Confirm at least one protected public land with access to at least three field work sites.
3. Create a strategy to confirm two high school classes, or 60 students, to participate in the year-long project.
4. Develop a pre and post student evaluation of their understanding of the Study of Phenology and the issues of environmental protection.

#### **OUTCOME:**

We expect 60 students from diverse communities will participate in the program the first year.

#### **EVALUATION:**

- Using the student groups' data entry into the Nature's Notebook data management system, generate reports on the number of students performing the data entry and the number of species studied.
- Review the 60 pre and post student evaluations for their understanding of Phenology and environmental protection.
- Account for efficiency of class/group size, student numbers and staffing support.
- Review with land managers the value of the students' research observations and produce a

report from their input.

**D) Timeline**

**Provide a timeline for implementing the project. The start date and end date should be the same dates on the cover page.**

**The program start date is** August 1, 2022

**The program end date is** August 1, 2023

**Include timeframes for specific activities, as appropriate.**

**E) Target Population**

**1. Who will this grant serve?** High school students...grades 10, 11 and 12.

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

Youth – 60, Adults 10

**F) Projects in the Community**

**1. How does this program relate to other existing programs in the community?**

There are no known similar programs or is the Study of Phenology a curriculum subject.

**2. Who are your community partners (if any)?**

Riverside County Regional Park & Open Space District

Riverside County Office of Education

Murrieta Valley Unified School District

**3. Who else in the community is providing this service or has a similar project?**

No similar service or project is known.

**5. How are you utilizing volunteers?**

The project will require the development of volunteer Docents. This will be determined as the implementation of the project is designed.

**G) Use of Grant Funds**

**How will you use the grant funds? This answer should align with the specific activities previously outlined in C) Project Goal, Objectives, Activities and Expected Outcomes**

Funds will be used to cover the costs as follows:

- Project Management/Staff
- Round Trip Transportation from schools to field work sites.
- Access to field-work sites. Note: Preferred field work site is the Santa Rosa Plateau Ecological Reserve.

Specific habitat areas to be studied are in areas that may not open to the public and have limited access. Access fees may be assessed; donations may be required for access. Access has been altered due to destruction of access points, i.e., gates and bridges due to the Tenaja Fire. Funds to help reopen these sites would doubly benefit and enhance the public land for future public access in addition to access for the PEPE.

- Equipment/Connectivity

Onsite usage of iPad/Laptop for tracking and recordation of data.

PocketLabAir devices – 1 for each group, used at the field work site and taken back to the classroom for analysis and inclusion in classroom curriculum follow-up.

- Student Supplies
  - Protective gloves/leggings (snake chaps)
  - Binoculars
  - Journaling supplies/Clipboards
  - Project T-Shirts

### III. Project Future

#### A) Sustainability

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

SRPNEF has been successfully fundraising since 2003. A strategic plan is completed every two years to map out fundraising and program strategies to ensure programs can be sustained. The PEPE program will be a new, unique program that will be added to the list of programs to receive support from the community at large and private donors. SRPNEF is engaged in strategies so not to rely on grant funding to sustain its programs including the steady growth of a membership base with annual renewals that support the education programs.

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

#### A) Governance

##### 1. Describe your board of directors and the role it plays in the organization.

The 17 member- board is cohesive, diverse, sophisticated and committed to the mission. Each member is required and sits on at least one of the standing committees. The officers ~~serve~~ also serve on the Executive/Personnel Committee. Board provides fiduciary and policy oversight. Approves all budgets and contractual agreements.

##### 2. What committees exist within your board of directors?

The following are standing, working committees of the board:

- Executive / Personnel
- Budget & Finance
- Board Development
- Bylaws / Policies and Procedures
- Education
- Fund Development
- Membership Marketing

##### 3. How does the board of directors make decisions?

Recommended board actions come up from the work of the committees and can be proposed by the Executive Director. Recommendations are presented in advance for review and then placed on the agenda for discussion and approval. All actions are by formal board vote; moved, seconded, discussion, call for the vote. Simple majority approvals.

#### B) Management

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

Nature Education Program Manager – Recently retired 25-year Biology/Science Teacher/Department Head and School Board Trustee – Bachelor of Science minor in German, current credentials in Life Science, General Science, Cross Cultural Language and Academic Development

Executive Director – 25 years non-profit management and fundraising, 8 years as paid SRPNEF Executive Director, Bachelor of Science Business Administration.

##### 2. What is the CEO/Executive Director's salary - \$51,528.48

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### V. Project Budget and Narrative (Do not delete these instructions on your completed form and use this form).

A) **Budget Table:** Provide a detailed line-item budget for your **entire** program by completing the table below. Note that if funded, this is the budget that you will have to refer to in the Evaluation (Final) Report.

#### **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) The Gimbel Foundation **does not fund indirect costs.**



Project Budget & Budget Narrative

**B. Budget**

1. **Balance budget to bottom and left to right. Budget is now in balance. Please note corrections to balance have changed the grant request to \$46,767.**
2. **Salaries should only pertain to this project. Salaries in budget template have been adjusted to reflect only salary costs associated with this project.**
3. **Extend all values to line item total to project. Done.**
4. **Explain 52 -week salaries in relation to number of class meetings on site. Original salary description was showing total salary for the year. The adjusted salary information to reflect only this project is adjusted to hourly time spread out over the school year rather than a calendar year.**
5. **Explain teacher stipends – See #4 below in narrative.**

Line-Item Request	Line-Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel	Line Item Total of Project
Personnel: Project Manager	<b>320 hrs x \$25/hr = \$8,000</b>			\$8,000	<b>\$8,000</b>
Supervision/Exec Director	<b>160 hrs x \$25/hr = \$4,000</b>			<b>\$4,000</b>	<b>\$4,000</b>
Transportation	R/T High School Phenology- School Bus \$400/trip x 2 busses x 4 trips			\$3,200	<b>\$3,200</b>
	R/T Elementary Program School Bus \$400/trip x 4 days/wk x 25 weeks		\$40,000		<b>\$40,000</b>
	R/T High School Water Quality Study One van x 4 Trips		1,000		<b>\$1,000</b>
	R/T Middle School Program – R/T school to Diamond Valley Lake \$500 x 1 bus x 2 trips		1,000		<b>\$1,000</b>
Field Work Equipment	PocketLab Air – 1 device for each group of 4 = 15 groups x \$400			\$6,000	<b>\$6,000</b>
	iPads - \$1,000 x 2			\$2,000	<b>\$2,000</b>

	<p>iPad mo/fee x \$30 x 2 x 12</p> <p>Snake Chaps - \$40 x 60 = \$2,400</p> <p>Binoculars - \$85 x 15 = \$1,275</p> <p>Backpacks - \$20 x 60 = \$1,200</p>			<p>\$2,400</p> <p>\$1,275</p> <p>\$1,200</p>	<p><b>\$2,400</b></p> <p><b>\$1,275</b></p> <p><b>\$1,200</b></p>
Teacher Stipend	Phenology Project 2 teachers prep work per teacher union - stipend for work outside of the classroom. Approx \$2000/teacher			\$4,000	<b>\$4,000</b>
Substitute Coverage	<p>Phenology Project \$150/day x 4 trips x 2 substitutes/trip = \$1,200</p> <p>Middle School Trout in the Classroom Trout Release - \$150 x 2 trips = \$300</p>		\$300	\$1,200	<b>\$1,200</b>
Field Site Access	<p>Phenology Project Bridge Repair</p> <p>Access Fees – Phenology Project - Donation approx. \$100 per site x 3 / year</p> <p>Middle School Trout Release</p>		\$300	\$6,500	<b>\$6,500</b>
Educ Nature Videos/Distance Learning	<p>Phenology Project 1 videographer to document project</p> <p>Elementary and Middle /school nature education videos plus Educational YouTube Channel</p>		\$4,000	\$2,000	<b>\$2,000</b>
Community	Family Wildlife Day		\$3,000		<b>\$3,000</b>

Nature Education	Nature Edu Forum\ Family Wildlife Park		\$3,000 \$5,000		<b>\$3,000</b> <b>\$5,000</b>
Training	Docent Education/ Supplies & Training Support  Phenology Project Docent Training x 2	\$5,000			<b>\$5,000</b>
Materials & Supplies	Phenology Project Journals/Clipboards \$10 x 60			\$600	<b>\$600</b>
	Phenology Project Project T-shirts for students \$15 x 60			\$240	<b>\$240</b>
	First Aid Kits 4 x \$50			\$200	<b>\$200</b>
	Paper/Copying/Ink			\$500	<b>\$500</b>
Mileage	Program Manager 58.5cents/mile x 100/miles/week x 52 wks = \$3068	\$1,416		\$1,652	<b>\$3068</b>
Project Year End Event / Class Presentation - Food	Phenology Project \$15/person x 100 people = \$1,500			\$ 1,500	<b>\$1,500</b>
<b>TOTALS:</b>		<b>\$6,416</b>	<b>\$58,100</b>	<b>\$46,767</b>	<b>\$111,283</b>

### Budget Narrative

1. Project Manager – Dedicating at least 8 hours per week for 40 **weeks = 320 hours**  
\$25/hr x **320 hours** = \$8,000 – Will organize all aspects of project; meet with teachers, Train on Phenology data entry; train use of PocketLabs, supervise and participate in all field work. Design pre and post evaluation with teachers.  
Executive Director – Providing project supervision; liaison with school districts approximately 4 weeks to negotiate access to sites; arrange accounting and processing with school districts/school site principal. Develop MOU with school districts. **\$25/hr x 160 hrs = \$4,000.**
2. Transportation – Cover the R/T buses from school to field sites – two classes, to two sites 4 times during the school year. For the Phenology project 2 buses at \$400 each x 4 trips = \$3,200
3. Field Work Equipment – Field sites are remote locations on protected land. Bridge and trail access. No vehicle access; hiking. PocketLabs for climate change study. One pocket lab for each 4-member Group, \$400/device x 15 groups = \$6000 (includes tax and shipping) iPads for use in field for pre-trip

research, data entry to Local Phenology plan program; taken back to classroom for future classroom work.  $\$1,000 \times 2$  plus monthly usage fee =  $\$2,720$ . 60 Snake Chaps for leg/bite protection at  $\$40/\text{each} \times 60 = \$2,400$ . One binocular per 4-member group -  $\$85/\text{each} \times 15$  groups =  $\$1,275$ . 60 backpacks  $\times \$20 = \$1,200$ .

4. Teacher Stipends – Teachers will be working with SRPNEF in advance of the implementation of the project. **As the project is not a required activity, and is an augment of their regular assignment requiring extra prep time, the teacher/district/union contracts may require they be compensated for the extra activity outside of their regular curriculum assignments.** There is a pay schedule for such projects and the amount varies on the type of activity. The amount allotted is an estimate based on previous arrangements with school districts that SRPNEF has worked with in the past.  $\$2000/\text{teacher} \times 2 = \$4,000$ .

**a. Have the District's unions been contacted about the stipends?**

**We have reviewed the local unified school district stipend schedule listing different types of activities. Other school district schedules are similar. The stipends are a lump sum paid over the school year and are paid to the teachers through their regular payroll process. SRPNEF would be invoiced by the district for the stipends should they be required. The approval of the teacher's participation will come from the site Principal. The stipend inclusion in this budget is approximate so to be prepared if the stipend is required. The stipend does not cover their regular day teaching day, it is for advance prep and extra work on the project outside of the regular day.**

**b. Are classes being held during hours in which teachers are already being paid?**

**Yes. However, the project work is not described as "classes" but day-long "field work" at open space protected properties. The Nature's Notebook software and PocketLab training and data entry/analysis takes place in the classroom and also at times on the school campus. The use of the Pocket Labs will take place on the field work sites. The activity of data entry for both platforms can also take place both in the field. The reporting out of their findings will be developed in the classroom but presented off site. The four field work dates will take place within the school day. The teachers will receive their regular pay. The extra "stipend" work is for the advance collaborative work, including the development of the evaluation tool.**

5. Substitute Coverage – Not all students in the class may participate in the project and will remain ‘ in class. A substitute will be called in. The current average cost for substitutes is \$150/day x 4 trips x 2 classrooms = \$1,200.
6. Field Site Access – The targeted public land for the project is the Santa Rosa Plateau Ecological Reserve. The property is a State Ecological Reserve and has special areas set aside for research. These areas are the perfect sites for this project. The Reserve is very diverse in habitats and eco-systems. But access to the areas has been hampered due to the Tenaja Fire and bridges were destroyed and have not been repaired. Some other funds are available to help with the repairs but are not enough to complete the repairs. With this grant, we would like to be able to provide assistance to repair the bridges, which are part of the trail system, that the project will need. This would enhance the existing trail system and help towards the ultimate reopening of the trails to the public as well. Estimate cost to complete the repairs = \$6,500.
7. Distance Learning Video – Create a video of the project for teachers can use in their classrooms; ‘ Distribute to schools and make available on SRPNEF YouTube Channel Hawks, Rocks & Nature Talks. Discounted video production = \$2,000
8. Training – Recruit and train at least two volunteer docents assigned to the project. Costs associated with the training include fingerprinting, shirts, protective gear, backpacks, etc. \$250 x 2 = \$500
9. Materials and Supplies – Students will need journals and clipboards for recording onsite; provide T-shirts for the program to generate pride, inclusion, and curiosity from other students. Need first aid kits for each teacher and we anticipate copying that will take up ink. Estimating total cost of \$1,540 for all.
10. Mileage – Program manager will be travelling to schools and field sites on a regular basis. Using 2022 federal standard mileage reimbursement rate of \$.58.5/mile.

Year-End event – Plan a “report out” by the students...what they learned...get their feedback. Make it fun. Invite school Principal, parents and SRPNEF board of directors. Asking for \$1,500 to help with food and special recognition awards.

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

*Secured/Awarded*

Name of Funder: Foundation, Corporation, Government, Individual Donors, Other (specify)	Amount
Membership Program	50,000
Special Events	193,355
Investment Income	25,000
Grants	12,000
Unsolicited	6,000

*Pending*

Name of Funder: Foundation, Corporation, Government, Individual Donors, Other (specify)	Amount	Decision Date
Pechanga Development Corp	20,000	June
Southern Cal Edison	5,000	June
Riverside County Supervisor Districts 1 & 3	4,000	May

**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 / Unsolicited	\$8,125	3%	Membership	\$50,000	16%
Fundraising/Special Events	\$193,355	63%	Invest Income	\$27,050	6%
Corp/Foundation Grants	\$30,200	10%	Other Unearned	\$5,000	1.5%
Government Grants	\$2,500	.5%			

**Notes:**

## S.L. Gimbel Foundation APPLICATION

### VII. Financial Analysis

**Agency Name:** Santa Rosa Plateau Nature Education Foundation

**Most Current Fiscal Year (Dates):** From 7/1/2020 To: 6/30/2021

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
\$160,122	\$134,016	\$26,306	\$0

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

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	83.6%	16.4%	0

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

Percentage of Organization's <u>Current</u> Total Budget used for Administration \$27,270	Column C, Management & general expenses per 990 above \$26,206	<b>Differential</b> <b>+3.7%</b>
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If the differential is above (+) or below (-) **10%**, provide an explanation:

## S.L. Gimbel Foundation APPLICATION

**Quick Ratio:** Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$839,319	0	\$26,377	31.8

---

**Excess or Deficit for the Year:**

<b>Excess or (Deficit)</b> <b>Most recent fiscal year end</b> <b>\$143,275</b>	<b>Excess or (Deficit)</b> <b>Prior fiscal year end</b> <b>\$(23,106)</b>
--	---

**Notes:** Deficit is due to drastic revenue reduction as a result of the cancellation of all fundraising activities due to COVID.

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## Budget Comparison

	Actual Most Recently Completed Year	Budget Projected Current Year	Variance
	2021	2022	
<b>INCOME</b>			
Individual Contributions	58,125.62	59,000.00	874.38
Corporate Contributions	3,500.00	27,000.00	23,500.00
Foundation Grants	30,200.00	27,500.00	-2,700.00
Government Contributions	39,128.00	7,500.00	-31,638.00
Other Earned Income	29,977.14	193,355.00	163,377.86
Other Unearned Income	5,000.00	5,000.00	
Interest and Dividend Income	<u>26,160.94</u>	<u>27,050.00</u>	<u>889.06</u>
<b>Total Income</b>	192,101.70	346,405.00	154,303.30

## EXPENDITURES

### Personnel

Salary CEO/Exec Dir	51,528.48	58,246.00*	6,717.52
Staff/Hourly	49,693.01	59,600.00	10,006.99
Payroll Taxes	8,121.52	10,800.00	2,678.48
Insurance - Wrks Comp	632.00	1,000.00	368.00
Insurance - Health			
Payroll Services	2,096.00	2,200.00	104
Retirement			
<b>Total Personnel</b>	112,071.01	131,946.00	19,874.99

\* Amount budgeted but is not actual. No increase in Exec Dire Salary for 2022.  
Remains same as 2021.

### General Program/Administration

Bank Investment Fee	2,731.81	2,700.00	-31.81
Publications			
Conferences & Meetings	10,217.78	11,250.00 **	1,032.22
Mileage (Exec Dir)	112.38		-112.38
Audit & Accounting	2,350.00	3,050.00	700.00
Program Consultants	4,619.02	24,650.00***	20030.98
Insurance Expense	3,841.71	3,500.00	-341.71
Telephone - Land Line	1,915.96	2,000.00	84.04
DSL & Internet	5,017.48	4,050.00	-967.48
Website - New and 3 site	6,593.00	3,600.00	-2993.05

mgmnt				
Office Supplies	2,151.94	2,540.00	388.06	
Postage & Delivery	204.53	300.00	95.47	
Printing & Copying	152.50	100.00	-52.50	
Miscellaneous	39,853.20	115,727****	93,965.64	
<b>Total General Prgm/Admin</b>	<b>191,832.57</b>	<b>305,673.00</b>	<b>113,840.63</b>	
<b>Revenut Less Expense</b>	<b>269.33</b>	<b>40,732.00</b>	<b>40,462.67</b>	

\*\* \$1,250 is for actual meetings/workshops attended. \$10,000 expenses associated with donor, volunteer and member meeting and events held to educate and train donors, volunteers and members.

\*\*\* Expenses associated with four education video production and strategic planning.

\*\*\*\* Expenses associated with certain education programs, i.e., bus transportation, Education Resource Forum and Family Wildlife event.

NOTE: Operating budget does not reflect Investment revenue or expenses but is included in the 990.

Ellis Investment Revenue	149,984.42
Fees	<u>-6,678.59</u>
	143,005.83
These are included in the 990	270
not shown in operating	<b>143,275.83</b>

**Part IX ONLY 990**

Form 990 (2020)

**Santa Rosa Plateau Foundation**

\*\*-\*\*\*6697 Page 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

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	<b>(A)</b> Total expenses	<b>(B)</b> Program service expenses	<b>(C)</b> Management and general expenses	<b>(D)</b> Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22	5,000.	5,000.		
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	47,921.	44,314.	3,607.	
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	49,693.	49,693.		
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
<b>9</b> Other employee benefits				
<b>10</b> Payroll taxes	8,122.	8,122.		
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management				
<b>b</b> Legal				
<b>c</b> Accounting	4,446.		4,446.	
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees	7,517.		7,517.	
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	1,969.		1,969.	
<b>12</b> Advertising and promotion				
<b>13</b> Office expenses	26,447.	22,268.	4,179.	
<b>14</b> Information technology				
<b>15</b> Royalties				
<b>16</b> Occupancy				
<b>17</b> Travel				
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings				
<b>20</b> Interest				
<b>21</b> Payments to affiliates				
<b>22</b> Depreciation, depletion, and amortization	115.		115.	
<b>23</b> Insurance	4,473.		4,473.	
<b>24</b> Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b> Distance Learning	1,894.	1,894.		
<b>b</b> Habitat Program	1,378.	1,378.		
<b>c</b> NERF Forum	1,347.	1,347.		
<b>d</b>				
<b>e</b> All other expenses				
<b>25</b> Total functional expenses. Add lines 1 through 24e	160,322.	134,016.	26,306.	0.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here  if following SOP 98-2 (ASC 958-720)

032010 12-23-20

Form 990 (2020)

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10  
2020.04020 Santa Rosa Plateau Foundati 3040\_\_1

**INLAND EMPIRE COMMUNITY FOUNDATION  
S. L. GIMBEL FOUNDATION FUND**

Please complete the form and type your answers directly underneath the questions. Leave one space between numbered questions.

**ORGANIZATION INFORMATION**

1. Name of your Organization

Santa Rosa Plateau Nature Education Foundation

2. Grant #

3. Grant Amount:

\$25,000

4. Date Awarded (date on award letter)

July 1, 2015

5. Grant Period (Indicate start date and end date per Grant Agreement)

8/2015 – 11/2016

6. Location of your Organization (City, State)

Murrieta, CA

7. Name and Title of person completing evaluation

Ginger Greaves, Executive Director

8. Phone Number

909-732-2209

9. Email Address

execdirector@srpnef.org

**KEY OUTCOMES AND RESULTS**

10. Total number of clients served through this grant funding:

A) Per original grant application, what is the estimate number served:

180

B) Actual number served:

275

11. Describe the project's key outcomes and results based on the goals and objectives. (Include the program accomplishments as a result of the Gimbel grant AND for the entire program. Please make the distinction between the Gimbel funded program accomplishments and the total organizational program, as a whole).

Goal:

Sustain the Environmental Education Pathway (EEP) program and increase the number of school districts, schools and students participating in the EEP.

Activities:

- Design EEP curriculum guide for elementary and high school
- Train teachers/introduce Trout in the Classroom program/purchase equipment

- Reach out to high school teachers in Temecula Valley Unified School District to develop field site work study sessions at the Santa Rosa Plateau.

Objective: In terms of specific quantifiable criteria: (3 objectives in grant application)

A) Per original grant application:

1. Develop written guideline for EEP, along with student assessment and program evaluation tools
2. Increase the number of 4<sup>th</sup> grade Trout-in-the-Classroom programs by two.
3. Add one new high school/class to the Habitat Studies and Restoration component of the EEP.

B) Actual grant outcome, results, accomplishments:

1. Develop written guideline for EEP, along with student assessment and program evaluation tools. A significant review of a methodology for our grassland restoration program began in 2015, concluded in 2017 and was published in 2018. Conducted by UCR Graduate students, and paid for partially from the Gimbel Family 2016 grant funds, the paper evaluated the value of the student's plan to eradicate non-native grasses by mowing. The plot of land used for the study is located on the Santa Rosa Plateau Ecological Reserve. Students in the middle school grassland restoration component of the EEP developed the restoration plan and completed the work. The published findings includes an assessment and evaluation of the methodology used.
2. Increase the number of 4<sup>th</sup> grade Trout-in-the-Classroom programs by two. Program exceeded goal with the addition of two new elementary schools participating for a total of 5 classrooms for a total of 250 4<sup>th</sup> and 5<sup>th</sup> grade students participating in the 4-month program.
3. Add one new high school/class to the Habitat Studies and Restoration component of the EEP. Murrieta Mesa Valley High School was added with 25 11<sup>th</sup> and 12<sup>th</sup> grade students participating. The classroom teacher from MVUSD partnered with an AP class from Temecula Valley Unified School District and the two classes completed field work at Murrieta Creek, surveying and testing water quality, discovering the species of fish and other animals living in the water habitat while learning about the life cycles of the animals, and what is affecting their survival.

12. Describe any challenges/obstacles the organization encountered (if any) in attaining goals and objectives.

The development of the EEP guide, assessment and evaluation tools, had taken longer than anticipated. The challenge was associated with first finding a right consultant, and then developing the scope of work. The published grassland paper, to be included in the evaluation information, was also taking place.

13. How did you overcome and/or address the challenges and obstacles?

The challenge of coordinating the EEP efficiently and effectively will be addressed as we move towards retaining an education coordinator which we plan to do in the new fiscal year.

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

Partnership with the Riverside County Office of Education was cemented to work together on future environmental education programs and projects to more students and classrooms.

15. Briefly describe the impact this grant has had on the organization and community served.

The Santa Rosa Plateau Foundation is extremely grateful to the S. L. Gimbel Foundation for support of its mission and education programs. The S. L. Gimbel Foundation's funding was critical in enabling us to add more classrooms, including a classroom from another/new school district. Because of the S. L. Gimbel Grant...we are moving towards duplicating the EEP and all of its components into other districts. It is a methodical process, taking small steps at a time, but it is because of the Gimbel Grant that we can continue. Thank you.

**BUDGET**

16. Please provide a budget expenditure report. Also, provide a budget narrative that explains how the funds were utilized, what was purchased, what were the expenses items based upon the original budget submitted and approved. Use the form below and expand as needed:

Line Item Transportation	Line item description Bus and driver r/t from school to Reserve	Approved amount from TCF (per the submitted budget) \$12,000	Actual Expenditure \$12,000
Research/Restoration Tools	Soils testing and coring equip, snake chaps	\$2,000	\$2,000
Stipends/Substitutes	Teacher stipends for supervision and substitute coverage when teachers are off-site with program.	\$6,000	\$6,000
Curriculum Consult	Cover UCR Botany Student consult and field site evaluation, work with classroom teachers.	\$5,000	\$5,000
			\$25,000

**SUCCESS STORIES**

17. Please tell us ONE success story.

SRPNEF provides annual small scholarships to graduating seniors who are going on to college to study in the field of environmental science. The scholarship program is funded through private donations and special event fundraising. Two of the Murrieta Valley Unified School District high school students who participated in the Water Quality / Habitat Studies (Objective #3) project applied, and were awarded, the scholarships.

They both indicated the experience in the SRPNEF project helped them to make their decision as to the field of study they wanted to pursue.

**Internal Revenue Service**  
Director, EO Rulings & Agreements  
P.O. Box 2508  
Cincinnati, OH 45201

**Department of the Treasury**

Employer Identification Number:  
71-0946697  
Document Locator Number:  
17053-054-72206-8  
Toll Free Number: 877-829-5500

Date: March 6, 2008

SANTA ROSA PLATEAU FOUNDATION  
PO BOX 941  
MURRIETA, CA 92564

***Acknowledgement of Your Request***

We received your Form 8734, Support Schedule for Your Advance Ruling, or other information regarding your public support status. When communicating with us, please refer to the employer identification number and document locator number shown above.

Your tax exempt status under section 501(c)(3) of the Internal Revenue Code remains in effect.

***What Happens Next?***

The information you submitted was entered into our computer system at our processing center in Covington, Kentucky, and has been sent to our Cincinnati office for initial review. We approve some cases based on this review. If this is the case, you will receive a letter stating that you are a publicly supported organization.

If the review indicates that additional information or changes are necessary, your case will be assigned to an Exempt Organization Specialist in Cincinnati who will call or write you. We assign cases in the order we receive them.

If the additional information indicates that you meet one of the public support tests, you will receive a letter stating that you are a publicly supported organization. If the public support tests are not met, we will send you a letter re-classifying you as a private foundation. That letter will tell you why we believe you do not meet the public support tests, and will include a complete explanation of your appeal rights.

***When Can You Expect To Initially Hear From Us About Your Application?***

Normally, you may expect to hear from us within 120 days. If you do not, you may call our toll free number at 1-877-829-5500 Monday through Friday. Please have your identification numbers available so that we can identify your case. If you would rather write than call, please include a copy of this notice with your correspondence.

Notice 3369 (cg) - (Rev. 12/2000)