Inland Empire Community Foundation
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2023 S.L. Gimbel Foundation Food Grant Application By Invitation Only

Internal Use Only:
Grant :

Organization / Agency Information

1)Organization/Agency Name: *The Food Bank of Western Massachusetts*		
2)Physical Address: 97 North Hatfield Road		*City/State/Zip* Hatfield Ma, 01038
3)Mailing Address: 97 North Hatfield Road		*City/State/Zip* Hatfield Ma, 01038
4)CEO or Director: Andrew Morehouse		*Title:* Executive Director
5)Phone: 413-203-4801	*6)Fax:* 413-247-9577	*7)Email:* AndrewM@foodbankwma.org
8)Contact Person: Liz Budd		*Title:* Grants Relations Officer
9)Phone: 413-203-6396	*10)Fax:* 413-257-9577	*11)Email:* LizB@foodbankwma.org
12)Web Site Address: www.foodbankwma.org		*13)Tax ID:* 04-2751023

Program / Grant Information

Interest Area:

14)Program/Project Name: Food Acquisition & Distribution			*15)Amount of Grant Requested:* $100,000
16)Total Organization Budget: 21,996,188	*17)Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 91%*	*18)Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): 3.6%*	*19)Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 8.9%*
20)Purpose of Grant Request (one sentence): *The purpose of this grant request is for The Food Bank of Western Massachusetts to purchase food items in order to provide the quantity and quality necessary to meet the basic needs of over 200,000 food insecure people in western Massachusetts*			
21)Program Start Date (Month and Year): 10/1/2022		*22)Program End Date (Month and Year):* 9/30/2023	
23)Gimbel Grants Received: List Year(s) and Award Amount(s) *2013: $10,000 2014: $10,000 2016: $11,000 2018: $15,000 2019: $15,000 2020: $15,000 2021: $100,000*			

Signatures

24)Board President / Chair: (Print name and Title) Dr. William A. Dávila, Board President	*Signature:* [signature]	*Date:* 3/2/23
25)Executive Director/President: (Print name and Title) Andrew Morehouse, Executive Director	*Signature:* [signature]	*Date:* 3/6/23

<u>2023 S.L. Gimbel Foundation Fund APPLICATION</u>
<u>Narrative</u>

Please provide the following information by answering **<u>ALL</u>** questions (I to IV), **12 Font, One Inch Margins.** Use the format below (I to IV). Type your complete answers to the question directly below the question. Please do not delete the questions/instructions/examples and provide clear, specific, and concise answers.

I. Organization Background

A) What are the history, mission and/or purpose of your organization?

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

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

Founded in 1982 by a small diverse group of community members our mission is to "*Feed our neighbors in need and lead the community to end hunger*". To accomplish this, we serve as the region's emergency food network clearinghouse to rescue, purchase, store, and distribute healthy food to households at risk of hunger and who face food insecurity. Incorporated as a 501(c)3, by 1983 The Food Bank was distributing about 630,000 pounds of food to the community through our former small warehouse and had started our first Brown Bag: Food for Elders program.

We built the first phase of our current warehouse in Hatfield in 1986 and expanded it in 2002, doubling the size of our warehouse, coolers, freezers, and office space just before the Great Recession. We subsequently experienced a tremendous two-fold spike in demand, which had not declined in the decade since the end of the Great Recession. Although these expansions more than doubled our capacity, demand for food assistance exceeded our capacity in 2017. Since the COVID-19 pandemic struck in March 2020, demand for food assistance has increased even further. Last December, we purchased vacant land in the city of Chicopee and plan on beginning construction for a new warehouse and headquarters in 2022 and moving in mid-2023.

In 1992 we purchased a farm becoming the first food bank in the nation to start a farm. In 2019 we purchased a second farm. Today, we partner with local farmers who steward the land and grow organic produce. The Food Bank receives a share of the harvest in lieu of cash rent.

Last fiscal year despite challenging circumstances, we served over 263,000 people distributing 12.1 million pounds of food -- the equivalent of 10.1 million meals. More than half of this food is perishable including produce, frozen meats and dairy. Produce, most of which is fresh vegetables accounts for 30% of our total pounds distributed with over 1 million pounds from local farms.

Three-quarters of the food we distribute flows through our 160+ member agencies – local 501(c)3 and faith-based food pantries, hot meal sites and shelters scattered across our urban centers and rural towns. The rest we distribute through our direct-to-household Mobile Food Bank and Brown Bag: Food for Elders sites. Today there are 51 Brown Bag sites serving 5,500 elders (55+) annually. At these sites elders pick up a 12-15lb. Bag of healthy groceries enough for 10-12 meals.

In 2013, we began our Mobile Food Bank with one pilot site. Today, we have 27 Mobile Food Bank sites with 43 distributions each month. This program brings primarily fresh produce to neighborhoods designated as food deserts with high rates of child poverty and food insecurity, and which lack access to an existing emergency food program. Last year, we distributed 1.8 million pounds of healthy food through this program.

Over the past few decades, we have added public policy education and advocacy, nutrition education, Technical assistance and capacity bu8ilding support for partners as well s a Food Insecurity Screening and Referral Initiative (FISRI) and SNAP outreach and enrollment assistance. Our SNAP staff assist more than 1,000 income-eligible residents overcome barriers to successfully apply for this critical federal nutrition assistance program each year and our FISRI program connects over 200 families annually with support services including, Transporation, child care, job training, education and much more. Through these efforts we not only feed our neighbors in need but help lead the community to end hunger.

II. Project Information:

A) Statement of Need

Specify the community need(s) you want to address and are seeking funds for. Include demographics, geographic characteristics of the area or community to be served, community conditions and income level. Include relevant statistics.

The Food Bank of Western Massachusetts goal is to reduce the impacts of food insecurity—the state of being without reliable access to enough quantities of affordable, nutritious food on the communities we serve. We serve a diverse area covering 2,700 square miles which includes the states 3rd largest city (Springfield) and some of its smallest and most rural towns (population under 500). We serve all of Berkshire, Franklin, Hampshire and Hampden counties which according to the Feeding America's *Map the Meal Gap* have food insecurity rates ranging from 8.1% (Hampshire county) to 12.1% (Hampden county). This means 1 out of every 10 residents face food insecurity and hunger cross this region. This rate rises to nearly 1 in 4 for children (20.1%) for children and for Black and Hispanic residents.

According to the American Community Survey an estimated 227,000 people live at or below 200% of the Federal Poverty Measure the current threshold for which families are considered low income and eligible for Federal food assistance and other social support programs. Similar to food insecurity poverty rates rise to 1 in 3 for Hispanic and 1 in 4 for lack residents compared to 1 in 12 for white residents of the region. While poverty is an important measure it is important to note that individuals can be food insecure but live above the poverty line.

Recent studies, including one by the USDA, demonstrate that as the rate of food insecurity rises so does one's risk for ten diseases including, hypertension, coronary heart disease, hepatitis, stroke, cancer, asthma, diabetes, arthritis, chronic obstructive pulmonary disease and kidney disease. According to The Center on Budget and Policy Priorities "those lacking consistent access to adequate food…spend roughly 45% more on medical care in a year than people in food-secure households" [1]. Perhaps most importantly the USDA ERS concludes "…food security status is more strongly predictive of chronic illness in some cases even than income" [2]. Through our food distribution we reach these neighbors in need and ensure they have access to healthy nutritious food including fresh produce and perishable items, such as dairy and meat, reducing the risk of food insecurity driven nutrition related diseases.

Through our food distribution program, we ensure that our food insecure neighbors have access to nutritious food that supports a healthy and productive life. Our program seeks to get food to those who need it most reducing barriers in access by working with a network of over 160+ food pantries, meal sites and shelters as well as 53 Brown Bag Food for Elders sites which distribute grocery bags of age appropriate food to elders 55+ and 27 mobile Food Bank sites which distribute primarily fresh produce in areas of high child poverty and limited access to full service grocery stores across our 2,700 square mile region.

B) Project Description
Describe your food distribution program.

1. What are the specific activities of the food program?

The Food Bank's emergency food distribution operates 5 days a week 52 weeks a year (except applicable federal holidays). Each day food bank staff monitor inventory and order food from a variety of sources including state and federal emergency food programs, farmers, wholesale distributors and specialty product producers. Through this variety of sources, we ensure our warehouse remains stocked with a wide range of healthy nutritious food.

Food stocked in our warehouse is then listed on an online database from which our partners can select what they need for their local emergency food site. Our warehouse staff take these orders and pick, pack and prepare food requests for pick up or delivery. Partners, with staff and volunteer capacity, pick up orders at our warehouse in Hatfield. Nearly a quarter of our partners are unable to come to The Food Bank warehouse to pick up food due to lack of vehicles or staff. As a result, these partners rely on our delivery service to ensure they are stocked on a dependable basis. Some of these programs, especially those in small towns, are only open a few times a month and have limited storage capacity making it critical that they receive the quantity of food they need just before their distribution times. Every month our delivery trucks are on the road bringing perishable and shelf-stable food to 57 of our 160+ food pantries, meal sites, shelters, as well as all 53 Brown Bag: Food for Elder sites, and 43 Mobile Food Bank distributions.

For sites that receive deliveries, once our trucks arrive what happens next depends on the site. For food pantries, meal sites, shelters and Brown Bag sites, drivers help unload pallets of produce, perishables and shelf stable foods of delivery trucks and into distribution areas for the local site to stock and organize. For Mobile Food Bank sites, drivers along with site volunteers unload not only food but tables, bags and safety equipment and set up, what looks like, a farmer's market. There those in need line up and select the foods they would like to take from that day's options. Over 90% of the Mobile Food Bank's food is fresh produce supplemented by shelf stable staples including canned or dried goods and bread. Each day drivers return to The Food Bank to repeat the delivery process

2. **How do you identify/qualify those in need?**

The Food Bank and our network have a variety of qualifying processes that identify those in need. As part of our member agency program all meal sites, pantries and shelters receiving food from our warehouse must serve at least 51% "needy" people. Eligibility is determined by these organizations through various verifications, including applications that verify income level and/or living in an economically distressed area.

Individuals receiving food through a Brown Bag Food for elders site pre register and must be 55+ and living at or under 185% of the Federal Poverty Level. For Mobile Food Bank Sites those attending are self selecting. However, locations are strategically chosen and specifically located in areas considered *Food Deserts*—places with high rates of food insecurity, poverty and extremely limited access to fresh produce as well as areas that lack service providers.

3. **How often is the food distribution offered (before COVID and now)?**

Our emergency food network operates 365 days a year and continued to do so despite the Covid-19 Pandemic. As a result of the pandemic there were a few minor and temporary closures in early 2020 to help our member agencies and direct-to-household programs change to adapt to public health safety requirements. Today, most partners and distribution sites are again operating as they did before the pandemic with some beneficial changes that reduce wait times and increase public safety at program sites.

4. **How many people will be served by the food distribution program (children, youth, adults, seniors) that is being considered for the Gimbel Foundation request and the total program?**

Based on previous years we expect to serve over 250,000 unique people over the course of the year and an average between 90,000-100,000 people every month. Of those served we expect 28% to be children, 55% adults and 18% seniors.

5. **Please explain how you keep track of number of people served.**

The Food Bank is a member of the Feeding America Food Bank network and as a result we are required to track our impacts in multiple ways. Using an online interactive database called Tableau we track information such as number of people, their age group, location, pounds of food distributed, type of pounds including fresh produce, dairy, meat, shelf stable foods and more. We track this data in real time to ensure we are meeting all our programs benchmarks. This requires a collaboration with our partners who report numbers of people who visit their food pantries, meal sites and shelters weekly to us. For our direct-to-household sites we track individuals directly through registrations and daily participation counts and pounds distributed. All this data is entered into the same online database allowing us to determine trends in service needs and help us identify and effectively meet possible gaps and meet ongoing community needs.

C) Project Goal, Objective, Activities and Expected Outcome

1. **Note: Objective, Outcome and Evaluation must all be based on the SAME QUANTIFIABLE CRITERIA (for example, "number served, or acres improved"). This quantifiable criteria should refer to the grant amount you are requesting from the Gimbel Foundation only and not the total program.**

State ONE GOAL, ONE OBJECTIVE, ONE OUTCOME. USE NUMBERS AND DO NOT USE PERCENTAGES.

2. **State ONE project goal. The Goal should be an aspirational statement, a broad statement of purpose for the project.**
3. **State One Objective**. The Objective should be specific, measurable, verifiable, action-oriented, realistic, and time-specific statement intended to guide your organization's activities toward achieving the goal. **Specify the activities** you will undertake to meet the objective and number of participants for each activity.
4. **State One Outcome.** An outcome is the individual, organizational or community-level change that can reasonably occur during the grant period as a result of the proposed activities or services. What is the key anticipated outcome of the project and impact on participants? State in a quantifiable and verifiable term.
5. **Evaluation:** How will progress towards the objective (per above) be tracked and outcome measured?
   Provide specific information on how many individuals will be evaluated (should be the same number as in the objective and outcome), how you will collect relevant data and

statistics that meet your objective and validate your expected outcome, in a quantifiable manner, as you describe your evaluation process.

BELOW IS AN EXAMPLE OF GOAL, OBJECTIVE, OUTCOME AND EVALUATION: Objective, Outcome and Evaluation should align and should be written in a linear format, using actual numbers, and data that are quantifiable and verifiable. Do not use percentages)

GOAL: Enhance and supplement the diet of food insecure families and children in Mariposa County with healthy, fresh food each month to improve their health and wellbeing.

OBJECTIVE: Distribute at least **500,000 meals of healthy, fresh food to 15,000 residents in need**.

ACTIVITIES:
1) Purchase fresh produce and other food items not provided by existing local farm and USDA sources to support 15,000 food distribution participants monthly.
2) Continue to promote monthly food distribution program through community partners across the county.
3) Input monthly food distribution data into USDA database system.

OUTCOME: We expect to **provide 500,000 meals to 15,000 food insecure county residents**, increasing their healthy food intake and habits.

EVALUATION: Using the USDA's tracking system we will generate reports on the number of food insecure children and families we have served. We will track our role in **providing 500,000 meals feeding 15,000 food insecure individuals** and account for additional success or lower numbers of individuals served.

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

GOAL: Enhance and supplement the diet of food insecure families and children in Western Massachusetts with shelf stable foods each month to improve their health and wellbeing.

OBJECTIVE: Distribute between 9 and 10 million meals to residents across Berkshire, Franklin, Hampshire and Hampden Counties over fiscal year 2023

ACTIVITIES:
1. Purchase and distribute between 11-12 million pounds of food over fiscal year 2023 \
2. Order and distribute enough fresh produce to ensure that 25% of food purchased and distributed is fresh produce
3. Provide food delivery services to 50+ partner sites, 53 brown bag and 42 Mobile Food bank sites delivering between 4-6 million pounds out of the total 11-12 million pounds.
4.

OUTCOME: We expect to provide 9-10 million meals to 250,000 food insecure residents in Berkshire, Franklin, Hampshire and Hampden Counties over the course of the 2023 fiscal year. We expect food purchased with S.L. Gimble funds to result in 45-55,000 meals depending on final pounds purchased. We determine this based on an industry standard pounds to meal ratio (1 meal = 1.2 pounds). Based on food we plan to purchase outlined in the following section the proposed purchases equate to 59,387 pounds which equates to 49,489 meals (59,387/1.2 =49,489)

EVALUATION: Using an online interactive database called Tableau we will track the number of people served and their age group in monthly counts and annualized unduplicated people served. We will also track pounds of food distributed and the type of food distributed including fresh produce, dairy, meat, shelf stable foods. We will also track where food is distributed, by what partner and/or site.

D) Timeline

Provide a timeline for implementing the project. The start date and end date should be the same dates on the cover page. Start date should be 3 months after the submission deadline.
The project start date is:
The project end date is:
Include timeframes for specific activities, as appropriate.

Timeframe	Activity	Description
10/1 to 9/30	Procure food for distribution	Work with state and federal emergency food programs, local producers, wholesale distributors and more to procure healthy nutritious food for distribution to the regions emergency food network
10/1 to 9/30	Distribution 11-12 million Pounds of food	Total pounds of food distributed in one year.
10/1-9/30	Track number of people served monthly, annually	Continue to track the numbers of people served monthly and annually through monthly participation counts at partner and direct-to-household sites
10/1-9/30	Track pounds of food distributed and the % of fresh produce	Track the pounds of food distributed through our warehouse as well as the types of food distributed including the percent of pounds that are fresh produce.

E) Target Population

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

The Food Bank of Western Massachusetts serves low-income individuals and their families facing food insecurity and hunger across the four western counties of Massachusetts including Berkshire, Franklin, Hampshire and Hampden County. Many are at or below 200% of the federal poverty measure—the threshold for which people are eligible for the Federal Supplemental Nutrition Assistance Program (SNAP) in the state of Massachusetts. We expect to serve an estimated: 26,000 children (under 18), 47,500 Adults (18-55), and 19,500 elders (55+) every month. Please note that actual service numbers may very +/- 3% from these estimates.

F) Community Partners

1. How does this program relate to other existing projects in the community?
2. Who are your key community partners? Provide a brief description of each key partner and their role(s) in this program.
3. How are you utilizing volunteers?

The Food Bank of Western Massachusetts is the regions emergency food network leader. We are the only clearinghouse specifically designed to rescue, procure and distribute food to the regions network of food pantries, meal sites and shelters. We support these organizations efforts to meet the needs of their local community by serving as a bulk sourcing, storing and distribution partner. Our organization can purchase and store products in large quantities which reduces the cost per product for all partners in the network whose programs are much smaller and have limited storage capacity.

Additionally, we also provide delivery for over a quarter of these partners. Many of the smaller food pantries, meal sites and shelters speckled across our 2,700 square mile region are unable to come to The Food Bank warehouse to pick up food due to lack of vehicles or staff. As a result, they rely on our delivery service to ensure they are regularly stocked on a dependable basis. Each year we delivery over 3 million pounds of food to these sites. Most importantly some of these programs, especially those in small towns, are only open a few times a month and have limited storage capacity making it critical that they receive the quantity of food they need just before their distribution times.

In addition to food pantries, meal sites and shelters our organization also partners with local community centers, senior centers, housing authorities, town offices, colleges, schools and community-based organizations. Many of these organizations serve as host sites for our direct-to-community distributions but some also provide space for our other community programs including a nutrition education and SNAP outreach and enrollment assistance program.

Finally, like most charitable organizations both The Food Bank and our partners rely on volunteers. For The Food Bank people volunteer to support us in a number of ways including sorting food donations in our warehouse, helping plant and harvest food from our community farm as well as specialized volunteers who help with fundraising, event planning and other specialized services.

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

We will use $90,000 of the proposed funds to purchase can and shelf stable foods that are often requested across our network. The remaining 10,000 will help cover the cost of freight and fuel to have this food delivered to our warehouse and then to our partner sites.

III. Project Future

A) Sustainability

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

To sustain our work we are committed to identifying and sourcing financial support from a variety of funding sources. Sources include grants from private and corporate foundations, individual donors, local corporate partners and fundraising events. For over 40 years we have met the financial needs of the organization and will continue to do so.

We have a team dedicated to outreach, education, and fundraising in the community as well as volunteer engagement that supports our operations and philanthropic stewardship. We also apply for and secure millions in grants each year. Our individual donor base has increased significantly over the years and especially since COVID-19 pandemic began. We are no stranger to fundraising and running giving campaigns and events to raise awareness and general operating funds. We have also successfully run two previous capital campaigns, supporting three expansions since our founding. Each time The Food Bank has outgrown its facility we have successfully secured the resources to sustain our expanded programming and facility.

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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.
2. What committees exist within your board of directors?
3. How does the board of directors make decisions?

The Food Bank Board of Directors governs the organization as is the case with all non-profit organization. Currently, there are 22 board members (of a maximum of 23 seats), representing a wide range of professions, geography, race/ethnicity, income, age and perspectives. Members have described it as one of the most active and engaging board of directors they have served on. The full board of directors meets six times a year to govern, including approval of the annual operating budget and audited financial statements, monitoring the quarterly financial statements and strategic plan performance dashboard, reviewing and updating governing policies, and actively engaging in and approving the capital campaign and building project of our future, larger and greener distribution center and headquarters.

The board has several sub committees including a Executive committee, Governance Committee, Finance Committee, Philanthropy Committee, Investment Committee, Food Operations Committee, Community Partnerships Committee and a Temporary Capital Campaign committee.

These Committees make recommendations to the full board of directors based on their expertise in, and focus on, specific operational functions. The full board of directors votes on recommendations and aspires to reach decisions unanimously. At times, a majority vote with little opposition occurs. The executive committee has the authority to make decisions on behalf of the full board although it rarely does and only on time-sensitive and non-controversial matters. In all cases, the executive committee is required to report its actions at the next meeting of the full board of directors.

B) Management

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

Shirley Del Rio is the Director of Food Operations has over two decades of experience managing, overseeing and directing food operations for The Food Bank of Western Massachusetts. She is responsible for overseeing all food operations staff, including warehouse managers, sourcing specialists and warehouse staff as well as maintaining relationships with our distributor partners. She will oversee the sourcing and purchasing of the proposed canned goods and funds to support the transportation of canned goods to our emergency food network of over 200 partners.

Liz Budd, is the Grants RElations officer and she will be responsible for working with Shirley to meet the grant goals and communicate grant objectives and outcomes to The S.L. Gimbel foundation.

2. What is the CEO/President/Executive Director Salary?

136,025

V. Project Budget and Narrative (Do not delete these instructions on your completed form). Please provide a detailed line-item budget for your project by completing the budget form below. **The maximum requested amount is $100,000 or 25% of your operating budget, whichever is less, OR the amount on your invitation to apply email.** Delineate your line items requests per example below:

- 90% of total request for the purchase of food items only. (Ex. Total request of $100,000; 90% is $90,000 for food)
- 10% of total request for **transportation OR for coordination** (Ex. Total request of $100,000; 10% is $10,000 for transportation)
- Canned tuna will not be funded.

Food items must be delineated (i.e. canned vegetables, soup, pasta, dried beans, rice, etc.). For each food item, indicate the cost per unit (pound, carton, case, etc.) and the quantity. See attached example.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel	Line Item Total of Project
Beef Ravioli	8 pallets with 96 cases of 24, 15 oz cans @ $23.15/case Total cost equation: (8 x 96 x $23.15)			$17,779.20	$17,779.20
Beefaroni	9 pallets with 96 cases of 24, 15 oz cans @ $21.10/ case Total cost equation: (9 x 96 x $21.10)			$18,230.40	$18,230.40
Chicken in a pouch	12 pallets with 90 cases of 48, 4.50oz cans @ $32.37/ case Total cost equation: (12 x 90 x $32.37)			$34,959.60	$34,959.60
Chicken Flavored Rice	6 pallets with 60 cases of 12, 6.25oz cans @ $10.83/ case Total cost equation: (60 x 60 x $10.83)			$3,898.80	$3,898.80
Parmeasean Pasta sauce	6 pallets with 60 cases of 12, 6.25oz cans @ $9.99/ case Total cost equation: (60 x 60 x $9.99)			$3,569.40	$3,569.40
Spanish Rice	6 pallets with 60 cases of 12, 6.25oz cans @ $10.83/ case Total cost equation: (6 x 60 x $10.83)			$3,898.80	$3,898.80

Beef Skillet Dinner	6 pallets with 60 cases of 24, 5.60oz cans @ $21.66/ case Total cost equation: (6 x 60 x $21.66)	$160.80		$7,639.80	$7,797.60
Freight and Fuel	Estimated cost to ship product to Food Bank Warehouse and then distribute to 240 local emergency food sites			$10,000	$10,000
TOTALS:		$160.8		$100,000	$100,160.80

Provide a narrative for the line item Transportation OR Coordination.

The Freight and fuel line is an estimated cost of freight expenses which are the shipping costs billed to The Food Bank by the food distributor in order to ship the ordered items. We expect that the shipment of the product listed above will come in at 2-3 tractor trailers shipments. Average freight costs per shipment depend on product weight, distance and other variables. After these freight costs any remaining budget will be used to offset the costs of fuel for our delivery fleet that brings food from our warehouse to 57 sites across 2,700 square miles each month. We expect the majority of the budget to cover freight costs.

2023 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, Individual donors, In-Kind, Other (specify)	Amount
Point 32 foundation	100,000
Key Bank	75,000
Stop & Shop	100,000
Avangrid	10,000

Pending

Name of Funder: Foundation, Corporation, Government, Individual donors, Other (specify)	Amount	Decision Date
Citizens Bank	25,000	April 1 2023

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	6,540,423	24	2022 Individual donor contributions		
Fundraising/Special Events	1,041,744	4%	2022 fundraising events		
Corp/Foundation Grants	1,934,878	7%	Multiple Charitable Foundations		
Government Grants	8,149,878	30%	Federal and State Food Programs		

Notes: All of the totals above are pulled from page 4 of our most recent completed audit. The Government Grants is a sum of both the Federal and State grants received in FY 22. Please not the government grants line is a combination of MEFAP and USDA food.

S.L. Gimbel Foundation APPLICATION

VII. Financial Analysis

Agency Name: ___________________________________
Most Current Fiscal Year (Dates): From_____________ To:________

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
(This should be your recently filed Form 990 and should not be more than 2 years old)

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
23,694,319	21,565,847	859,472	1,269,000

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%	91%	3.6%	5.3%

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

Percentage of Organization's Current Total Budget used for Administration	Column C, Management & general expenses per 990 above	**Differential**
4%	3.6%	.04

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.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
3,291,765	109,474	869,570	3.9

This infor pulled from page 11 Part X of the 990

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
9,953,474	2,789,404

Notes: The increase in excess is due to our capital campaign to fundraising for a new headquarters and distribution facility. In 2017, our warehouse reached maximum capacity as demand for emergency food outpaced the size of our storage capabilities. Construction has begun on this facility, and we expect it to become operational in the late fall of 2023. These numbers are calculated based on net assets minus total expenses on page 4 of our organizational audit.

VIII. EMAIL TWO PDF files to Gimbel@iegives.org

A. One PDF file of the following, #1 to #5 **B. Second PDF file of the following, #6 & #7**

#1	Completed Grant Application Form (cover sheet, narrative), budget page and budget narrative (see sample) and sources of funding, financial analysis page	#6	A copy of your most recent year-end financial statements (audited if available)
#2	Your current operating budget and the previous year's actual expenses (see sample Budget Comparison)	#7	A copy of your most recent 990. **Please make sure that the Form 990 you submit is no more than two (2) years old.**
#3	Part IX **only** of the 990 form, Statement of Functional Expenses (one page). **Please make sure that the Form 990 you submit is no more than two (2) years old.**		
#4	For past grantees, a copy of your most recent final report.		
#5	A copy of your current 501(c)(3) letter from the IRS		

SAMPLE Budget Comparison

	Actuals Most Recently Completed Year	Budget Projections Current Year	Variance
Income	**20____**	**20____**	
Individual Contributions	-	-	-
Corporate Contributions	-	-	-
Foundation Grants	-	-	-
Government Contributions	-	-	-
Other Earned Income	-	-	-
Other Unearned Income	-	-	-
Interest & Dividend Income	-	-	-
Total Income	**-**	**-**	**-**
Expenditures			
Personnel			
Salary CEO – Required	-	-	-
Staff Salary (total)	-	-	-
Payroll Taxes	-	-	-
Insurance - Workers' Comp	-	-	-
Insurance - Health	-	-	-
Payroll Services	-	-	-
Retirement	-	-	-
Total Personnel	**-**	**-**	**-**
General Program/Administrative			
Bank/Investment Fee	-	-	-
Publications	-	-	-
Conferences & Meetings	-	-	-
Mileage	-	-	-
Audit & Accounting	-	-	-
Program Consultants	-	-	-
Insurance Expense	-	-	-
Telephone Expense - Land Lines	-	-	-
DSL & Internet	-	-	-
Website	-	-	-
Office Supplies	-	-	-
Postage & Delivery	-	-	-
Printing & Copying	-	-	-
Miscellaneous	-	-	-
Total General Program/Administrative	**-**	**-**	**-**
Total Expenditures	**-**	**-**	**-**
Revenue Less Expense	**-**	**-**	**-**

S.L. Gimbel Foundation Fund
Food Grant Application

III. <u>Project Budget</u> SAMPLE
Project Budget and Narrative (Do not delete these instructions on your completed form).
Please provide a detailed line-item budget for your project by completing the budget form below.
The maximum requested amount is $100,000 <u>or 25% of your operating budget, whichever is less.</u> Delineate your line items requests per examples below:

- 90% of total request for the purchase of food items only. (Ex. Total request of $100,000; 90% is $90,000 for food)
- 10% of total request for transportation **<u>OR</u> for coordination** (Ex. Total request of $100,000; 10% is $10,000 for transportation
- Canned tuna will not be funded.

Food items must be delineated (i.e. canned vegetables, soup, pasta, dried beans, rice, etc.).
<u>For each food item, indicate the cost per unit (pound, carton, case, etc</u>.) and the quantity. See attached example.

Line Item	Line Item Description	Requested Amount
Eggs	15 dz/case, **$12/case**, 400 cases	$ 4,800
Fresh Milk	½ gallon 1%, **$2/unit**, 19,600 units delivered	$39,200
Oil	12 32 oz case, **$23/case**, 400 cases	$ 9,200
Frozen Chicken Breast	75 ind. wrapped breasts/case, **$115/case**, 320 cases	$36,800
Coordination	10% of $100,000 total request	$10,000
TOTAL:		**$100,000**

The Food Bank
of Western Massachusetts

Current Operating Budget & Last Years Expenses

Food Bank of Western Massachusetts

Income Statement VS Current/Annual Budget

Period October 01, 2022 through February 28, 2023

	FY2022 YTD Actual	FY2023 Annual Budget
Income		
Revenue from direct contributions	$8,542,451.42	$3,188,000.00
Revenue from non-government grants - Unrestricted	$192,049.00	$210,000.00
Revenue from non-government grants - Restricted	$1,237,804.95	$834,823.50
Revenue from government grants - Restricted	$505,024.54	$645,248.98
Food Revenues	$15,545,672.90	$13,461,358.82
Donated Goods & Service revenue	$36,051.52	$33,000.00
Revenue from government agencies	$1,491,670.82	$1,817,213.32
Revenue from program-related sales & fees	$169,475.79	$206,900.00
Revenue from dues	$23,600.00	$21,900.00
Revenue from investments	$93,011.95	$105,000.00
Revenue from other sources	$94,804.87	$166,500.00
Special events	$1,041,743.26	$975,000.00
Unrealized (gain) loss	($438,887.60)	($0.00)
Total Income	$28,534,473.42	$21,664,944.62
Expense		
Salaries & related expenses	$3,618,650.05	$4,687,564.88
Contract service expenses	$421,251.09	$285,519.00
General Operating expenses	$100,614.18	$121,271.00
Facility & equipment expenses	$361,224.93	$431,897.12
Program Expenses	$710,465.77	$998,198.00
Travel & meetings expenses	$13,996.08	$34,945.00
Inventory Expense	$17,150,808.81	$13,832,008.82
Fundraising & Development Expenses	$88,351.86	$120,750.00
Special Event Expense	$49,145.89	$51,250.00
Other expenses	$1,289,005.48	$86,850.00
Donated Goods & Services Expense	$303,195.75	$0.00
Business expenses	$36,051.52	$311,744.83
Total Expense	$24,142,761.41	$20,961,998.65
Net Income (Expense)	$4,391,712.01	$702,945.97

The Food Bank
of Western Massachusetts

Part IX of Latest 990

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	14,941,704.	14,941,704.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	2,972,799.	2,972,799.		
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	409,883.	19,742.	355,386.	34,755.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	2,426,223.	1,631,559.	138,794.	655,870.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	133,111.	85,653.	20,726.	26,732.
9 Other employee benefits	384,610.	243,804.	45,536.	95,270.
10 Payroll taxes	254,021.	127,411.	72,901.	53,709.
11 Fees for services (nonemployees):				
a Management				
b Legal	32,489.	27,326.	5,163.	
c Accounting	36,850.		36,850.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	498.		498.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	351,913.	147,687.	20,046.	184,180.
12 Advertising and promotion	11,393.	30.	6,474.	4,889.
13 Office expenses	723,102.	632,704.	22,975.	67,423.
14 Information technology	31,370.	7,468.	16,501.	7,401.
15 Royalties				
16 Occupancy	75,234.	70,117.	2,709.	2,408.
17 Travel	13,996.	8,434.	1,800.	3,762.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	52,384.	9,334.	4,327.	38,723.
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	265,899.	225,667.	40,232.	
23 Insurance	37,755.		37,755.	
24 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.)				
a REPAIRS & MAINT	172,560.	115,321.	10,695.	46,544.
b AGENCY SUPPORT EXPENSE	137,326.	137,326.		
c VEHICLE EXPENSE	75,832.	75,832.		
d FEES & SUBSCRIPTIONS	75,351.	14,144.	14,042.	47,165.
e All other expenses	78,016.	71,785.	6,062.	169.
25 **Total functional expenses.** Add lines 1 through 24e	23,694,319.	21,565,847.	859,472.	1,269,000.
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 ▶ ☐ if following SOP 98-2 (ASC 958-720)				

The Food Bank
of Western Massachusetts

2021 Final Grant Report

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:** The Food Bank of Western Massachusetts
2. **Grant #** 19294
3. **Grant Amoun**t: 100,000
4. **Date Awarded** November 1, 2021
5. **Grant Period** November 1, 2021, to November 1 2022
6. **Location of your Organization**; Hatfield Massachusetts
7. **Name and Title of person completing evaluation:** Liz Budd, Grants Relations Officer
8. **Phone Number**: 413-203-6396
9. **Email Address**: LizB@foodbankwma.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:** 230,000

    B) **Actual number served**: 263,468 unique individuals

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: **Support people facing food insecurity by rescuing, purchasing, storing, and distributing healthy nutritious to the region's emergency food network.**

Activities:

1. Support 173 member partners by supplying their sites with healthy nutritious food
2. Procure over 13 million pounds of healthy nutritious food to meet demand for emergency food in our region

3. Provide culturally relevant food by seeking input from at least 50 partners and the communities they serve to identify food products food insecure people want and need that we can add to our warehouse**.**

Objective: In terms of specific quantifiable criteria:

A) Per original grant application: Provide 11 million meals during the 2022 fiscal year (10/1/2021 to 9/30/2022). Of these 11 million meals S.L. Gimbel Foundation Fund funds will provide an estimated 46,390(revised) meals with proposed product purchases.

B) Actual grant outcome, results, accomplishments:

We distributed 10,204,475 million meals of which S.L Gimbel Foundation Fund grant provided 46,930 Between November 1, 2021, and November 1, 2022. We were thankful that during the first half of our fiscal year (Nov. 2021- Feb. 2022) demand for emergency food returned to pre-pandemic levels reducing from a pandemic high of serving 124,000 people in Nov of 2020 to 81,000 people a month by February 2022. However, by March 2022, The Food Bank was serving over 95,000 people—a 14,000 person increase between February and March 2022. Sadly, this monthly service number has continued to rise in response to economic inflation. The reduction in the number of people served monthly at the beginning of the grant period is the main reason we believe we did not distribute the expected 11 million meals. However, this reduction was short-lived and we expect to distribute more in our 2023 fiscal year than in 2022 possibly again surpassing the 11 million originally predicted for 2022

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

The Food Bank like many food banks and food distribution organizations faced several challenges this past year. We continue to face low availability of certain food products, shipments that are delayed and shipments that are unexpectedly cancelled. These ongoing challenges make it difficult for our warehouse operations team to manage inventory and plan future orders. This is especially difficult as we outgrew our warehouse space in 2017 and in order to keep up with ongoing demand The Food Bank has maintained the highest turn rate in the history of our organization. This "turn" or "velocity' rate measures how fast we receive and redistribute food. In other words, it allows us to distribute more food despite limited warehouse space. We are thankful that a new warehouse is under construction which will help address this long term challenge by tripling our current warehouse capacity.

Along with ongoing product disruptions, the recent growth in inflation has led to both a surge in demand for food assistance as well as increased costs per unit of food we purchase to supplement state and federal emergency food sources. While demand for assistance remains below the pandemic high of 124,000/month the steady rise in costs of goods has meant a steady increase in people utilizing the emergency food network over the past six months. Today we are serving closer to 100,000 people each month.

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

Due to the continued product shortages and delays we submitted a revised application on August 3rd, 2022, after continually trying to source the original product as proposed. We received approval for this revision on September 26th and promptly ordered what was still available. Unfortunately, one of the items on the revision was no longer available so we proposed substituting canned chicken for canned ham on Sept 27th and received email approval to move forward with the final purchase on October 4th.

In addition to working closely with the foundation to receive approval for the product purchases our food sourcing team focused on developing stronger relationships with more local (in state) and regional (New England) producers and manufacturers ensuring that The Food Bank has more diverse sources through which to procure food for distribution across Franklin, Hampshire, Berkshire and Hampden County. This ensures that even if products aren't available from one distributor, they are potentially available through another. In addition to this we also brought on a new delivery vehicle in July 2022 which increased the pounds of food we could deliver to our partners across the four western counties increasing the quantity of food we were able to move out of our warehouse on a weekly basis to local partner sites. This contributed to helping us maintain the turn rate described earlier.

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

As a result of this grant, we strengthened our distributor relationships which will help the food bank continue to adapt and manage ongoing market-based product delays and reduced product availability. These relationships help us troubleshoot limited product availability, identify alternatives and ensure we can continue to source the quantities of food needed to support the region despite ongoing market disruptions and increased cost per product due to economic inflation.

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

Without support from the S.L. Gimbel Foundation Fund The Food Bank would not have been able to source any of the foods purchased through the grant. This grant was especially important because it supplemented foods we receive through both federal and state emergency food programs which are also experiencing supply chain disruptions and delays. The grant ensured that when we were unable to source food through emergency programs that we had the funding to supplement gaps and continue to meet the need of the rising number of food insecure neighbors in our region.

<u>BUDGET</u>

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	Line item description	Approved amount from TCF (per the submitted budget)	Actual Expenditure
Chili w/Beans	12/15oz cans,/Case **$14.55/case**, 192 cases/pallet, 5 pallets	$13,968.00	$13,968.00
Chicken Chili w/Beans	12/15oz cans,/Case **$12.90/case**, 192 case s/pallet, 5 pallets	$12,384.00	$12,384.00
Spaghetti Rings	12/15oz cans,/Case **$13.90/case**, 192case s/pallet, 5 pallets	$13,344.00	$13,344.00
Grape Juice	40/60z cans/ $11.85/case/ 96cases/pallet 5 pallets	$5,688.00	$5,688.00
Beef Pasta Dinner	24/5.6oz cans,/Case **$23.10/case**, 56case s/pallet, 6 pallets	$7,761.60	$7,761.60
Canned Chicken	18/16oz cans,/Case $26.95/case, 216 case s/pallet, 5.68 pallets	$33,094.60	$33,094.60
Transportation	Freight costs and Fuel for delivery or product.	10,000	$10,390.00 ($7,236 Fright + $3,154 Fuel)

SUCCESS STORIES

17. Please tell us ONE success story.

Support from this grant helped The Food Bank navigate an increasingly unpredictable food market ensuring that we could source food and provide for our network uninterrupted during the grant period. Without support from charitable funders like the S.L. Gimbel Foundation Fund organizations like ours and those we serve could lose access to healthy foods. This challenge has especially been felt as economic inflation has driven up commodity prices and made sourcing food for distribution across the emergency food network more expensive. In our 2022 fiscal year we spent more than 1.3 million dollars more on food procurement than budgeted due to economic inflation. Sadly, we expect this trend to continue. However, with support from foundations like S.L. Gimbel Foundation Fund organizations like ours can ensure that our neighbors facing food insecurity have access to the food they need.

The Food Bank
of Western Massachusetts

IRS 501(c) 3 Determination Letter

Internal Revenue Service

Date: February 2, 2004

The Food Bank of Western Massachusetts
Inc.
P.O. Box 160
Hatfield, MA 01038

FEB - 9 2004

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

Person to Contact:
Ms. Edwards 31-07427
Customer Service Representative
Toll Free Telephone Number:
8:00 a.m. to 6:30 p.m. EST
877-829-5500
Fax Number:
513-263-3756
Federal Identification Number:
04-2751023

Dear Sir or Madam:

This is in response to your request of February 2, 2004, regarding your organization's tax-exempt status.

In March 1983 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Based on information subsequently submitted, we classified your organization as one that is not a private foundation within the meaning of section 509(a) of the Code because it is an organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's sources of support, or its character, method of operations, or purposes have changed, please let us know so we can consider the effect of the change on the exempt status and foundation status of your organization.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than $25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of $20 a day, up to a maximum of $10,000, when a return is filed late, unless there is reasonable cause for the delay.

All exempt organizations (unless specifically excluded) are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of $100 or more paid to each employee during a calendar year. Your organization is not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes.

Donors may deduct contributions to your organization as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to your organization or for its use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

The Food Bank of Western Massachusetts Inc.
04-2751023

Your organization is not required to file federal income tax returns unless it is subject to the tax on unrelated business income under section 511 of the Code. If your organization is subject to this tax, it must file an income tax return on the Form 990-T, Exempt Organization Business Income Tax Return. In this letter, we are not determining whether any of your organization's present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

Section 6104 of the Internal Revenue Code requires you to make your organization's annual return available for public inspection without charge for three years after the due date of the return. The law also requires organizations that received recognition of exemption on July 15, 1987, or later, to make available for public inspection a copy of the exemption application, any supporting documents and the exemption letter to any individual who requests such documents in person or in writing. Organizations that received recognition of exemption before July 15, 1987, and had a copy of their exemption application on July 15, 1987, are also required to make available for public inspection a copy of the exemption application, any supporting documents and the exemption letter to any individual who requests such documents in person or in writing.
For additional information on disclosure requirements, please refer to Internal Revenue Bulletin 1999 - 17.

Because this letter could help resolve any questions about your organization's exempt status and foundation status, you should keep it with the organization's permanent records.

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

This letter affirms your organization's exempt status.

Sincerely,

Janna K. Skufca

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