

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/5/2022 | 1:51 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and The GALA Pride & Diversity Center (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to the training program as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$23,500, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

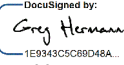
GRANTEE:  
The GALA Pride & Diversity Center  
Serrin Ruggles  
1060 Palm St  
San Luis Obispo, CA 93401  
sruggles@galacc.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:   
Serrin Ruggles, Director of Operations

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:   
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:   
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION

**Organization Name:** \*

The Gala Pride & Diversity Center

**Year Established:** \*

1994

**Fiscal Agent, if different than above:** \*

The Gala Pride & Diversity Center

**Tax ID #:** \*

770372544

**Document Certifying Federal Tax-Exempt status, if applicable**

501-c-3.pdf

60.72KB

**Name of Executive Director (or highest leadership position)**

Dusty Colyer-Worth

**Approximate Annual Budget:**

141,484

**Major Sources of Funding:**

Grants, Donations, Special Events, and Training Sessions

**Mission Statement:**

The Gala Pride & Diversity Center supports and empowers people of all sexual orientations, gender identities, and expressions to strengthen and unite our Central Coast community.

**Number of paid staff (full- or part-time):**

3

**Number of volunteers:**

150

**Name of Board President or Chair:**

Gary Borjan

**Organizational Leadership Chart** \*

GPDC Org Chart (1).pdf

108.93KB

**Name of Person completing this Application:**

Serrin Ruggles

**Organization Mailing Address: \***

Street Address

1060 Palm St

Address Line 2

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93401

Country

United States

**Phone: \***

805-541-4252

**E-mail: \***

sruggles@galacc.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

The Gala Pride & Diversity Center supports and empowers people of all sexual orientations, gender identities and expressions to strengthen and unite our Central Coast community. To this end, we provide support and social groups, youth services, special events, in-house affirming therapy services, community informational sessions, and connecting those in need with affirming services. We also provide regular community newsletters, cultural competency training, meet with community stakeholders to enact policy changes, and work with state run organizations to help them meet state and federal anti-discrimination requirements. Our community service center work is informed by community members who attend listening sessions, information sessions, or reach out to us directly, and there are no membership fees or requirements for receiving services. We have a volunteer board of directors, who work with our Executive Director to guide the organization forward. We also have two volunteer youth directors, as well as volunteer run committees such as our Pride and governance committee, another key way we engage our community in the development and delivery of our work. All of our work is framed by the DEI statement developed through collaboration with QueerProfs and BIPOC stakeholders in our community, which is posted on our website. The day-to-day work is overseen by the Director of Operations and carried out by our general staff members.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

The Gala Pride & Diversity Center is an LGBTQ+ resource center based in the city of San Luis Obispo offering a wide variety of support and advocacy services in San Luis Obispo County and Region. The majority of those receiving direct services are either organizations seeking to improve DEI efforts or LGBTQ+ individuals and families based in San Luis Obispo County. However, we collaborate with other local nonprofits to advocate for LGBTQ+, BIPOC, immigrant, disabled, and incarcerated communities, and to ensure that those communities are well represented in all of our training and social programming. Intersectional considerations for these and other marginalized communities are woven into all training sessions and services that we provide.

**PART 2: PROJECT INFORMATION****Name of DE&I Project \***

Intersectional Educational Empowerment and Expansion Project

**Est. number of people served through this project: \***

1100

**Est. number of SLO CITY RESIDENTS served through this project \***

1100

**Total Project Cost: \***

79,200

**AMOUNT OF CITY FUNDING REQUESTED: \***



66,700

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

The Intersectional Educational Empowerment and Expansion Project is a two-pronged project to expand our current training program offerings and capacity, and to increase educational offerings to our community stakeholders. One prong is the expansion of our current training program, which includes developing additional training modules and building our training program capacity. Our current program has 8 trainers on our roster and consists of a comprehensive overview of sexual orientation, gender identity, and expression, with 10 total modules, including those exploring specific considerations for youth, disabled people, survivors of intimate partner violence, older adults, and therapeutic considerations. Included in this proposal is the development of 3 additional modules focusing on intersectionality and the addition of at least 5 new trainers to be experts in the new content we're developing. The second prong is empowering our community through education, which includes offering low to no-cost training sessions to key community partners and increasing our capacity to bring empowering educational sessions to our LGBTQ+ community stakeholders.

The first stage of the expansion portion of this project would be supported by the hiring of a part-time Training Coordinator. The Training Coordinator would significantly increase our capacity for training by establishing a position dedicated to seeking out, curating, and organizing training sessions. This position would be partially funded by this grant for the first year, but the groundwork we're laying out will allow us to increase our revenue to fund the Training Coordinator role and grow it into a full time position funded by ongoing training services in 2024. We would set aside \$12,500 to cover half of the Training Coordinator's wages in 2023.

The second stage of the expansion project would re-engage our community-based Education Committee to develop 3 additional training modules. Our Education Committee members bring a wide variety of perspectives to our training development, and includes lawyers, therapists, teachers, disability resource specialists, and those with lived Black, Indigenous, Latine, and immigrant experiences. We plan to add 3 modules; one would focus on the intersection of LGBTQ+ and Black experiences and shared history between these communities. The second module would examine the intersection of LGBTQ+ and Latine experiences and history. The third module would discuss interfaith LGBTQ+ groups, their history, and support the development of affirming faith communities. Our training program is in high demand and with that, we are hearing more requests for modules focused on these key intersections. \$30,000 would be set aside to support the development of these modules by our staff and committee, and properly compensate those who provide expert insight.

The final stage of the expansion project would be to provide another Train the Trainer session to bring established trainers up to speed with the new modules and expand our retinue of available trainers. This 16 hour, 2 day program allows us to have a more robust and sustainable training program. \$7,200 would be set aside to develop and provide this training session to bring on at least 5 new trainers.

We want to empower our community through education. In the empowerment segment of this project, we will bring education to LGBTQ+ community members, as well as to impactful San Luis Obispo City and County organizations who stand to make a big difference in our community. In 2022, we identified a need to host informational sessions for LGBTQ+ community members and stakeholders to better understand issues impacting their lives and what actions they can take on those topics. We have already started to provide these sessions around topics such as Mpox and how upcoming Supreme Court decisions might affect our local LGBTQ+ community. LGBTQ+ often feel powerless or forgotten in the face of systemic oppression, and these sessions draw attention to the issues that impact us the most, educate our constituents on how they can help themselves and each other, and empower them to engage with their greater community. We would set aside \$8,000 to host at least eight of these LGBTQ+ community informational sessions in 2023.

In 2021, we hosted four free training sessions to the public through a grant from The Community Foundation's Growing Together Fund. These sessions empowered community members to better understand their LGBTQ+ neighbors and family members. In the spirit of the SLO DEI grant's goal to enhance the sense of belonging for all people in our community and support local projects, programs, and initiatives that contribute to creating a welcoming, inclusive, equitable, and safe SLO, we would like to offer the completed version of our intersectional and affirming LGBTQ+ inclusivity training to the SLO Office of DEI and all recipients of the SLO High Impact DEI Grant, and an additional two sessions for the general

public. The training sessions with grant recipients would be tailored to the needs of the project, program, or initiative to ensure they get the most impactful training possible. These sessions cost \$1,500 apiece in trainer and administrative fees, and we are requesting \$9,000 to provide four sessions open to the organizations and their constituents who have received the SLO DEI Grant, and two sessions open to the general public in 2024.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

The work on this project would directly impact the lives of LGBTQ+ people in San Luis Obispo City and County, especially those with multiple marginalized identities. By providing LGBTQ+ community informational sessions, we uplift our community from within, centering our voices in our issues and empowering marginalized people to engage with their communities. By expanding our training program, we are better able to empower our community as a whole to be more welcoming and increase inclusivity, safety, and equitability. We will divide any public sessions supported by this grant between zoom, in-person, or hybrid options to increase accessibility with the goal to make the events available to all SLO County residents. The training sessions we provide to organizations, programs, and employers set them up to be welcoming and knowledgeable when LGBTQ+ people access their services, empower LGBTQ+ employees, and better understand how intersectionality impacts all of our lives.

**Describe the equity gaps and community needs this project will address.**

Black, Latine, and LGBTQ+ people face barriers towards acceptance and equal access to services in our county. From the California Healthy Kids Survey, which is given to public school children in 7th, 9th, and 11th grade, we know that 37.0% of students in SLO county who identify as lesbian, gay, or bisexual report being physically attacked on school campus compared to 22.4% of heterosexual students. Transgender students are even more at risk, with 54.4% of trans students reporting being assaulted compared to 22.9% of cisgender students. Furthermore, the data tells us that LGBTQ+ students are at a higher risk to experience bullying, assault, suicidal thoughts, and feeling isolated at school in San Luis Obispo County schools compared to the rest of the state of California. These numbers only get more concerning when their LGBTQ+ identity intersects with a Black, Latine, or interfaith identity, which increases the risk of encountering prejudice and other barriers. If this is what’s happening to our students, we can see this as a reflection of what’s happening in the day-to-day lives of BIPOC and LGBTQ+ employees, customers, neighbors, and those seeking social services. Our training sessions provide people with destigmatizing information about marginalized groups and help them build the skills they need to be more welcoming, inclusive, and equitable to make San Luis Obispo County a safer place for BIPOC and LGBTQ+ people.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Number of Intersectional Modules	3 more by end of 2023
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Number of training sessions offered outside of this grant	At least 1 per month by beginning of 2024
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Number of Informational Session Attendees	Avg of 20 per session
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Training program sustainability	Training income covers Training Coordinator Salary by 2023
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Number of training recipients	At least 30 members of the public, and at least 30 representatives from DEI Grant Recipients
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Increase number of trainers	At least 10 total trainers available

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner	Activity/Service They Provide for This Project
Example: ABC Business	Example: Free Use of Space for Weekend Classes
Q Profs	Consulting for Black and Latine modules
Example: ABC Business	Example: Free Use of Space for Weekend Classes
Gala Education Committee	Intersectional input and consultation for modules
Example: ABC Business	Example: Free Use of Space for Weekend Classes
SLO Office of DEI	Receiving training and giving support in offering training to DEI Grant recipients

Provide the timeline for this proposed project.

The project components will be completed by the end of 2023 with training delivery in early 2024.

January - February 2023: Search for part-time Training Coordinator to begin January 2023 & re-engage the Gala Pride & Diversity Center Education Committee

January - December 2023: Implementation of 8 LGBTQ+ Community Informational Sessions

February - April 2023: Development of the Black & LGBTQ+ Intersections Module

May - July 2023: Development of the Latine & LGBTQ+ Intersections Module

August - October 2023: Development of the Interfaith LGBTQ+ Module

November - December 2023: Development and Implementation of Train the Trainer Program

Beginning of 2024: Implementation of training to DEI Grant recipients, SLO Office of DEI, and the general public

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

The development of the additional training modules will take one year to complete and then will be part of our established training program. Similarly, once our trainers have completed the Train the Trainer session, they will be prepared to present the training modules and their future costs will be covered by the income from training sessions we book with them. The public session and community informational sessions will be completed within the year and additional efforts to make these sessions available in the future will be covered by future grants and community fundraising. These public sessions increase public awareness and engagement with our organization, which means more sustaining donors to make this work possible. Any funds granted for the Training Coordinator position will be used to support the first year of development for this position. Our existing training program is in high demand, and the Training Coordinator would support expanding the program to meet the current demand and increase our capacity to seek out and implement new training opportunities. As it stands now, we have more demand than we have capacity to fulfill all training requests, so we feel confident that this position will pay for itself as we move forward. Our goal with this position is to get enough groundwork in the first year to expand the position into a full-time job that is paid for by income from training sessions.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
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1	Training Coordinator Salary	\$ 25,000.00	\$ 12,500.00	\$ 12,500.00
2	Black LGBTQ+ Training Module	\$ 10,000.00	\$ 10,000.00	\$ 0.00
3	Latine LGBTQ+ Training Module	\$ 10,000.00	\$ 10,000.00	\$ 0.00
4	Interfaith LGBTQ+ Training Module	\$ 10,000.00	\$ 10,000.00	\$ 0.00
5	Training New Trainers	\$ 7,200.00	\$ 7,200.00	\$ 0.00
6	Community Informational Sessions	\$ 8,000.00	\$ 8,000.00	\$ 0.00
7	SLO DEI Grant Recipient Training	\$ 6,000.00	\$ 6,000.00	\$ 0.00
8	Public LGBTQ+ Training	\$ 3,000.00	\$ 3,000.00	\$ 0.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY



### Describe the plan for promoting this project within the City of San Luis Obispo.

Community informational sessions are advertised on our website, calendar, weekly and monthly newsletters, and boosted social media posts. We often partner with other local nonprofit organizations to spread the word about special events such as these, and will lean on them to help us spread the word about these impactful programs.

### How will you highlight the City's support of your project?

All promotional materials and marketing for the training sessions and community informational sessions impacted by this grant will include the logo provided by the City of San Luis Obispo. Special recognition will also be given at the end of training sessions as part of the PowerPoint presentation in perpetuity, as well as in the community informational sessions. If we receive the grant, we will also put a shoutout to SLO Office of DEI and the SLO High Impact DEI Grant on our social media and monthly newsletter.

## PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Serrin Ruggles

### Signature \*

### Title: \*

Director of Operations

### Date: \*

8/30/2022

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

**MAR 24 1999**

GAY AND LESBIAN ALLIANCE OF THE  
CENTRAL COAST  
P.O. BOX 3558  
SAN LUIS OBISPO, CA 93403-3558

Employer Identification Number:  
77-0372544  
DLN:  
17053023713039  
Contact Person:  
MIKE CRONIN ID# 31094  
Contact Telephone Number:  
(877) 829-5500  
Our Letter Dated:  
May 1994  
Addendum Applies:  
No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(2).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(2) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(2) organization.

If we have indicated in the heading of this letter that an addendum applies., the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



District Director

Letter 1050 (DO/CG)



# Organization Leadership

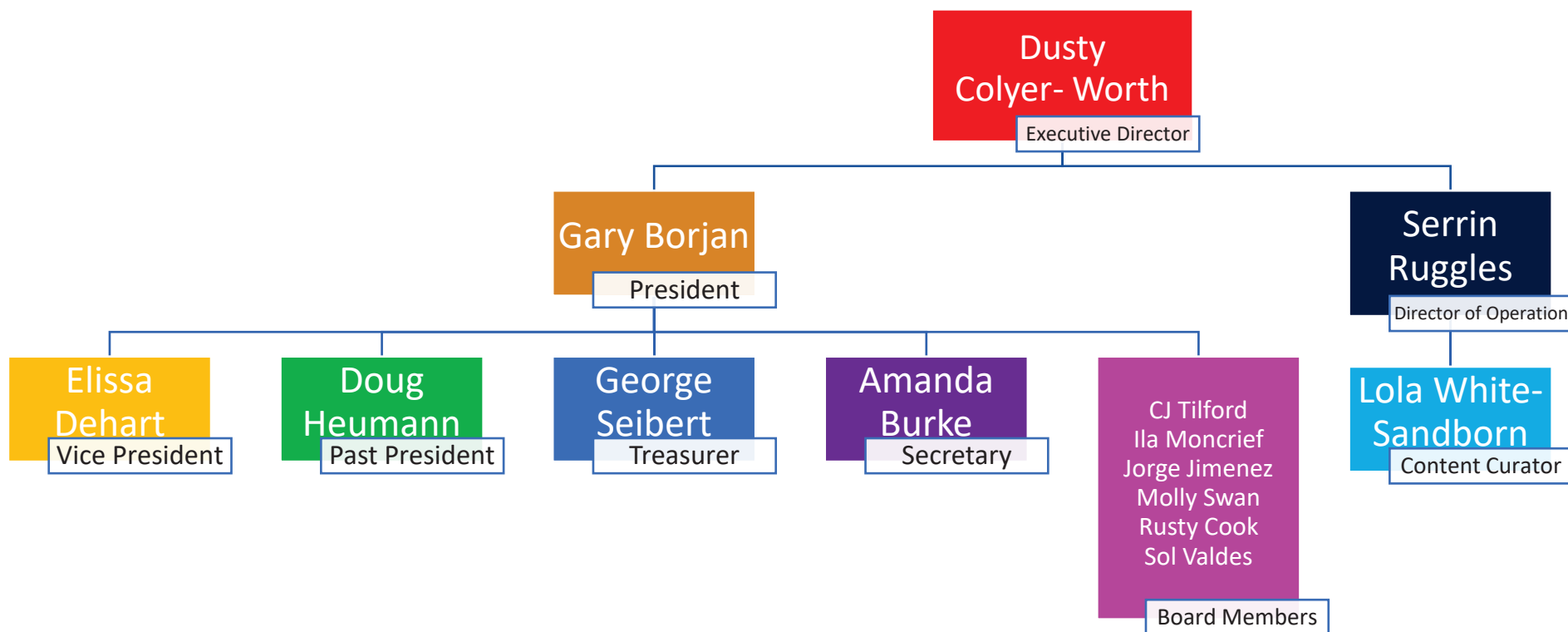


Exhibit B

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)



**Certificate Of Completion**

Envelope Id: 49113E05710F42DC81D9C670BD832D6D

Status: Completed

Subject: Complete with DocuSign: Final- GALA Pride and Diversity Center Completed Application Agreement ...

Department:

Supplier:

Source Envelope:

Document Pages: 12

Signatures: 3

Envelope Originator:

Certificate Pages: 5

Initials: 0

Daniel Clancy

AutoNav: Enabled

990 Palm Street

Enveloped Stamping: Enabled

San Luis Obispo, CA 93422

Time Zone: (UTC-08:00) Pacific Time (US &amp; Canada)

dclancy@slocity.org

IP Address: 50.192.209.57

**Record Tracking**

Status: Original

11/21/2022 1:52:57 PM

Holder: Daniel Clancy

dclancy@slocity.org

Location: DocuSign

**Signer Events**

Serrin Ruggles

sruggles@galacc.org

Security Level: Email, Account Authentication  
(None)**Signature**

DocuSigned by:



913574066FA94FC...

**Timestamp**

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Viewed: 11/28/2022 11:53:41 AM

Signed: 11/28/2022 11:54:10 AM

Signature Adoption: Pre-selected Style

Using IP Address: 47.35.39.4

**Electronic Record and Signature Disclosure:**

Accepted: 8/24/2022 9:58:22 AM

ID: d10d82e0-fed3-4aef-a582-8b6435276002

Mark Amberg for Christine Dietrick

mamberg@slocity.org

Assistant City Attorney

Security Level: Email, Account Authentication  
(None)

DocuSigned by:



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Sent: 11/28/2022 11:54:12 AM

Viewed: 11/28/2022 2:27:44 PM

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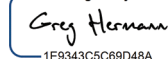
Greg Hermann

ghermann@slocity.org

Deputy City Manager

Security Level: Email, Account Authentication  
(None)

DocuSigned by:



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Viewed: 12/5/2022 1:50:56 PM

Signed: 12/5/2022 1:51:13 PM

Signature Adoption: Pre-selected Style

Using IP Address: 104.129.202.83

**Electronic Record and Signature Disclosure:**

Accepted: 12/5/2022 1:50:56 PM

ID: d770ede1-877e-4c46-ac37-12e66053072e

**In Person Signer Events****Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp**

Certified Delivery Events	Status	Timestamp
<b>Carbon Copy Events</b>		
Serrin Ruggles sruggles@galacc.org Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 8/24/2022 9:58:22 AM ID: d10d82e0-fed3-4aef-a582-8b6435276002	COPIED	Sent: 12/5/2022 1:51:15 PM
Matt Melendrez mmelendr@slocity.org Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 12/14/2022 6:19:31 PM ID: 02a0a1c7-8b1f-4f3e-a5f6-f78190bef4bc	COPIED	Sent: 12/5/2022 1:51:16 PM Viewed: 1/12/2023 3:06:38 PM
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
<b>Envelope Summary Events</b>		
Envelope Sent	Hashed/Encrypted	11/21/2022 1:57:46 PM
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Signing Complete	Security Checked	12/5/2022 1:51:13 PM
Completed	Security Checked	12/5/2022 1:51:16 PM
Payment Events	Status	Timestamps
<b>Electronic Record and Signature Disclosure</b>		

## **ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

From time to time, Carahsoft OBO City of San Luis Obispo (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through your DocuSign, Inc. (DocuSign) Express user account. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

### **Getting paper copies**

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. For such copies, as long as you are an authorized user of the DocuSign system you will have the ability to download and print any documents we send to you through your DocuSign user account for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

### **Withdrawing your consent**

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

### **Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of your DocuSign account. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use your DocuSign Express user account to receive required notices and consents electronically from us or to sign electronically documents from us.

### **All notices and disclosures will be sent to you electronically**

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through your DocuSign user account all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

**How to contact Carahsoft OBO City of San Luis Obispo:**

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: [keriksso@slocity.org](mailto:keriksso@slocity.org)

**To advise Carahsoft OBO City of San Luis Obispo of your new e-mail address**

To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address..

In addition, you must notify DocuSign, Inc to arrange for your new email address to be reflected in your DocuSign account by following the process for changing e-mail in DocuSign.

**To request paper copies from Carahsoft OBO City of San Luis Obispo**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.

**To withdraw your consent with Carahsoft OBO City of San Luis Obispo**

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your DocuSign account, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail, full name, US Postal Address, telephone number, and account number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

**Required hardware and software**

Operating Systems:	Windows2000? or WindowsXP?
Browsers (for SENDERS):	Internet Explorer 6.0? or above
Browsers (for SIGNERS):	Internet Explorer 6.0?, Mozilla FireFox 1.0, NetScape 7.2 (or above)
Email:	Access to a valid email account
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	<ul style="list-style-type: none"><li>•Allow per session cookies</li><li>•Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection</li></ul>

\*\* These minimum requirements are subject to change. If these requirements change, we will provide you with an email message at the email address we have on file for you at that time providing you with the revised hardware and software requirements, at which time you will have the right to withdraw your consent.

**Acknowledging your access and consent to receive materials electronically**

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

By checking the 'I Agree' box, I confirm that:

- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Carahsoft OBO City of San Luis Obispo as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by Carahsoft OBO City of San Luis Obispo during the course of my relationship with you.

## **AMENDMENT No. 1 TO DEI HIGH IMPACT GRANT AGREEMENT**

THIS AMENDMENT, dated 3/6/2024 | 3:47 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Richard Poncho Gonzalez Youth Foundation (referred to herein as GRANTEE).

### **WITNESSETH:**

WHEREAS, on November 28, 2022 GRANTEE and CITY entered into an Agreement for Diversity Equity Inclusion Program Grant (the "Agreement"), in which GRANTEE agreed to provide an After School Tennis Program serving BIPOC and LATINX youth as further described in GRANTEE's application submitted to the CITY on August 31, 2022 (the "Services"); and

WHEREAS, GRANTEE was unable to complete the Services by December 31, 2023 because of logistic complications including staffing difficulties and termination of GRANTEE's partner organization's youth services contract with the school sites; and

WHEREAS, GRANTEE is now able to complete the services further described in Exhibit 1 because they have established a working partnership with Big Brothers Big Sisters to connect directly with youth who historically have not accessed such activities, and

WHEREAS, the CITY reaffirms its finding that GRANTEE's services will provide a benefit to the community by enhancing a sense of belonging for all people and contributing to a community that is welcoming, inclusive, equitable, and safe, and the goals of GRANTEE'S services will be properly met if GRANTEE is allowed an extension time to perform the services.

NOW THEREFORE, in consideration of their mutual promises, obligations and covenants hereinafter contained, the parties hereto agree as follows:

1) **AMENDMENTS.** The parties agree to amend the Agreement as follows:

a) Paragraph 1 is deleted and replaced as follows:


The Parties acknowledge that GRANTEE made some of its Services, as described in its application (the "Application"), incorporated by reference and attached to the Agreement as Exhibit A, available to CITY residents in 2023. GRANTEE further agrees to complete the services described in Exhibit 1 of this Amendment by June 30, 2024.

b) Paragraph 2 is deleted and replaced as follows:

The Parties acknowledge that GRANTEE provided CITY with a mid-year report on June 3, 2023. GRANTEE shall provide a final program report, summarizing administrative, statistical, financial, and client Service activities in the form of Exhibit 2 of this Amendment, by July 15, 2024.

- 2) **FAILURE TO PERFORM.** Should GRANTEE fail to perform the services described in Exhibit 1 on or before June 30, 2024, GRANTEE shall return to the CITY a prorated sum calculated by the CITY which represents the funds granted to GRANTEE but unused by June 30, 2024. Additionally, should GRANTEE complete the services described in Exhibit 1 at a cost lower than the funding amount granted by the CITY, GRANTEE shall return to the CITY the excess funds. Either or both reimbursement(s) shall be made no later than July 15, 2024. Should GRANTEE fail to provide a final program report by July 15, 2024, GRANTEE may be deemed ineligible for future grants or other financial aid offered by the CITY.
- 3) **FORCE AND EFFECT.** Except as set forth in this Amendment, all terms and conditions of the Agreement shall remain in full force and effect.
- 4) **PRIORITY ORDER.** In the event of a conflict between the Agreement and this Amendment, the terms of this Amendment shall take precedence.
- 5) **AUTHORITY TO EXECUTE.** Each Party represents and warrants that it has full power and authority to execute this Amendment and to undertake each and all of its respective obligations hereunder, and that each person executing this Amendment on its behalf is duly and validly authorized to do so.
- 6) **COUNTERPARTS.** This Amendment may be executed in counterparts, each of which shall be deemed an original and all of which shall be taken together and deemed to be one instrument. The parties further agree that a signature transmitted via facsimile or e-signature shall be deemed original for all purposes hereunder.

GRANTEE

By:   
Gregory Gonzales, Executive Director

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:   
Greg Hermann, Deputy City Manager

APPROVED AS TO FORM:

By:   
Sadie Symens, Deputy City Attorney



February 5, 2024

Re: 2024 Pancho Foundation San Luis Obispo Tennis Programming

Dear Nestor,

Our programming plans are to partnership with Big Brothers Big Sisters to conduct an initial San Luis Obispo City community tennis clinic at Sinsheimer Park. The Clinic will be held on Saturday March 2<sup>nd</sup> from 10:00 – 2:00 to include a rsvp lunch and prizes. The Pancho Foundation will provide some books and other inspirational materials. It will include two hours of tennis programming. This will kick off their new Big Brothers Big Sisters Sports Buddies program. Along with kids, volunteers and others attending, their Board of Supervisors will be invited.

We are currently working with interim Big Brothers Big Sisters Executive Director Caity McCardell. The courts have been reserved with Parks and Recreation. She is currently developing a flyer for the event. We will begin working together this week on the promotional aspects of the Clinic.

We have discussed opening the Clinic up to other local organizations. Accordingly, I have contacted the YMCA Executive Director Douglas Trawick who will post our flyer at their Facility. I have also spoken with the Sinsheimer Elementary School and the School Unified District to acquire flyer posting approval for the event and subsequent programming. We have worked through this process last year for our activities at the Laguna Middle School. Caity mentioned the Latin Outreach Council and we will be reaching out to them to see if any beneficial partnerships can be developed for the programming.

After the first clinic, we plan to provide a series of lessons there during April through May. This will be our first clinic event. We will evaluate working with the Big Brothers Big Sisters mentors to see how the tennis programming works with Bigs and Littles to see if we can incorporate any programming with them during the week. We are also working with the YMCA and School District to see if programming can be provided directly at the Sinsheimer Elementary School.

We also contacted Mina Donker, Executive Director of Boys and Girls Club. We provided programming to their Almond Acres club last year and discussing having additional programming at their Tom Maas and Flamson sites.

We have Pancho's son Richard Jr, and two high school coaches, one who works at Tennis Warehouse, to help with the programming. Our plans are to provide 8 clinics within the City and 2 more in the County and the Boys and Girls Clubs. This will provide an even distribution of the funds between the City and the County.

I will provide updated finalized information this Friday. Please contact me if you need more information.

Thank you,

Gregory Gonzales  
(623) 810-1707  
Executive Director  
Pancho Foundation



Contractor: Richard Pancho Foundation			
	Planned Activity - Description	Expected Date of Implementation	Expected Dollar Amount Use
1	Partner with Big Brothers Big Sisters to conduct an initial San Luis Obispo City community tennis clinic at Sinsheimer Park. The Clinic will be held on Saturday March 2nd from 10:00am – 2:00pm and will include an RSVP for lunch and prizes. The Richard Pancho Foundation will provide some books and other inspirational materials. The clinic will include two hours of tennis programming. This will kick Big Brothers Big Sisters new Sports Buddies program. Along with kids, volunteers and others attending, their Board of Supervisors will be invited.	March 2, 2024	\$380.00
2	8 Follow-up clinics at Sinsheimer Park – Saturdays	April 6 <sup>th</sup> – June 1 <sup>st</sup>	\$2,280.00
3	4 Clinics at SLO County Tom Maas and Flamson Boys & Girls Clubs sites	April & May	\$814.00

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 11/28/2022 | 3:23 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Richard Poncho Gonzalez Youth Foundation (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to After School Tennis Program serving primarily BIPOC and LATINX youth as submitted in its application to the CITY on August 31, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$8212, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

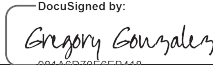
City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

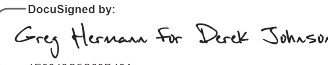
Richard Poncho Gonzalez Youth Foundation  
14079 W. Edgemont Ave.  
Goodyear, AZ 85395  
greg@panchofoundation.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:


Grantee

By:   
901A6B70CEED4418

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:   
1F8343C5C69D48A  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:   
49590B18C87B45D  
Christine Dietrick, City Attorney



Exh. A

## APPLICATION

### Diversity, Equity and Inclusion

### 2022-2023 FUNDING FOR HIGH-IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7073 or DEI@slocity.org*

#### PART 1: APPLICANT INFORMATION

Organization Name:	Richard Pancho Gonzalez Youth Foundation
Year Established:	2012
Fiscal Agent, <i>if different than above</i> :	
Tax ID#:	80-0816999
Name of Executive Director (or highest leadership position)	Gregory Gonzales
Approximate Annual Budget:	\$75,000
Major Sources of Funding:	Donations and Grants
Mission Statement:	To inspire and enhance the lives of today's youth through physical fitness, academic pursuit and character building through the sport of tennis.
Number of paid staff (full- or part-time):	Currently none
Number of volunteers:	10
Name of Board President or Chair:	Daniel Gonzales
Name of Person completing this Application:	Gregory Gonzales
Organization Mailing Address:	14079 W. Edgemont Avenue, Goodyear, AZ 85395
Phone:	(623) 810-1707
E-mail:	greg@panchofoundation.org
Name of Project:	Pancho Foundation San Luis Obispo Tennis Programming
Est. number of people served through this project:	150
Total Project Cost:	\$15,863
<b>AMOUNT OF CITY FUNDING REQUESTED:</b>	\$12,221

**Briefly describe your Organization's mission, primary activities, and operating structures.**

The main mission and activity are to provide an opportunity to nontraditional participants, mostly Hispanic, to play tennis through weekly programming. We also strive to inspire and increase the confidence of the kids through Pancho's story as a self-taught world champion.

We also provide several playday events, some by Richard Gonzales Jr. and Patience Santos at the Santa Maria Boys and Girls Club. As an example, we are part of a large event planned for September 17<sup>th</sup> in San Diego being held by the USTA's Southern Cal Tennis Association for Hispanic Month.

We've been in recent hibernation starting back this fall. The Foundation has operated primarily on family and others volunteering and donations and some grant awards. VP Greg Gonzales is a CPA and handles the administrative duties. The Foundation's President Daniel Gonzales and Greg Gonzales are recent cofounders of a new Foundation with Hall of Fame Player Rosie Casals and many other Latin Hall of Fame Members to promote the growth of Latin American tennis. This should increase the Foundation's operations.

**Describe the community(ies) your Organization supports.**

Please be specific in the population and geographic area.

We generally offer programming to BIPOC kids ages 5-16 years old. The male and female participation is equivalent. Programming is generally provided in Hispanic communities; some are low-income and/or immigrant communities.

**PART 2: PROJECT INFORMATION****Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

The proposed project will provide after school tennis instruction at three Boys and Girls Club's in San Luis Obispo, Santa Maria, and the new Paso Robles facilities. The Santa Maria Boys and Girls Club has tennis courts across the street and the SLO Boys and Girls Club has the Laguna Middle School courts. Paso Robles has indoor facilities.

Instruction will be provided by Richard Gonzales Jr., Pancho's son. Richard played and trained with his father often. He has taught professional players along with famous celebrities. The kids will be able to learn about his father through memorabilia and other printed inspirational materials. Assisting is Coach Patience Santos, an Elementary and Middle School Physical Education and Spanish Teacher at the Old Mission Catholic School. She coaches the varsity high school tennis team at Mission College Preparatory and won the 2018 CIF High School Championships. She teaches tennis for the SLO Parks and Recreation Department in the summer. Lastly, "Coach Patience" was the recent recipient of the 2022 United States Professional Teacher's Association (USPTA) Southern California Diversity and Inclusion Bob Ryland Award. Together, as part of the Pancho Foundation, both have led clinics at the Santa Maria Boys and Girls Club. Patience is our California Central Coast Community Outreach and Event Planner. Some employed at the Tennis Warehouse have offered to help.

Richard and Patience have recently visited some of the Clubs to discuss having this programming and they were very interested in the prospect.

We also have our Inspirational Baseball Cards (some in Spanish), various media, a new Pancho Gonzales Fine Points of Power Tennis Booklet, and Tennis Legend Pancho Gonzalez bio junior high-level book. We are developing nutritional materials that can be used. We'd love to show you samples.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

We will provide tennis programming at three Boys and Girls Clubs. Our prior events and clinics at the Santa Maria Club along with a recent visit to the new Paso Robles Club show most of the participants will be BIPOC and mostly Hispanic.

**Describe the equity gaps and community needs this project will address.**

The Foundation generally serves nontraditional tennis participants, mostly Hispanic. This often includes those persons that don't normally have access to tennis, economically or physically, many living in urban or rural areas. Almost all the kids we've taught at the Santa Maria Boys and Girls Club are Hispanic and some are the children of farmworkers. Tennis programming will serve to offset possible unfavorable conditions by providing kids uncommon opportunities to learn skills and tools to help promote their health and confidence through tennis and its physical activity.

**In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.**

Methods of Evaluation	Indicators of Success / Measurable Outcomes
<i>Example: # of BIPOC serving on public boards, committees</i>	<i>Example: 10% increase by end of 2021</i>
Our Board is mostly BIPOC	Establishing and Maintaining Programming at each site (20 participants) is Goal 1
The new LATF Board is all BIPOC	A 10% increase is actually a good goal for Year 1&2
Dan Gonzales helped establish and was Chair of the United States Tennis Association's first National Diversity and Inclusion Committee	Increasing the No. of Programs on Site is Indicator of Success and associated Goal
Dan recently served with the USTA's Intermountain Section Diversity Committee	

**In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.**

Name of Partner	Activity/Service They Provide for This Project
Tennis Warehouse	Equipment and Potential Volunteers
USTA Southern California	Logistics, Equipment and Supplies as Needed
Latin American Tennis Foundation	Hall of Fame Consultation and future funding

**Provide the timeline for this proposed project.**  
Mid- January through Mid- December 2023.

**Describe your plan for sustainability beyond the City's one-year award funding, if applicable.**

Through local and national partnerships and fundraising, we will strive to grow the program at each Club.

As needed, we can work with some employees at the Clubs so they can continue to instruct the kids.

Pancho Foundation Board members are cofounders of the new Latin American Tennis Foundation with President Rosie Casals, International Tennis Hall of Famer. The new Foundation's mission statement is To represent, enhance and provide equal opportunities to Latin tennis players of all ages and in Spanish is Representar, mejorar y brindar igualdad de oportunidades a los tenistas latinos de todas las edades. Our participation and partnership with the new Foundation will enhance financial donations and other resources to grow the program

### PART 3: PROJECT COST / BUDGET

Using the table below, please provide a broadly- itemized budget for your project, including the source of any matching funds.

	Item Description <i>add more lines as needed</i>	Total Cost	Amount Provided by City Funds	Amount of Matching /Source*	Other Funds
1.	Tennis Instruction	\$5,985.00	\$ 5,485.00	\$	500.00
2.	Travel	2,415	2,415		-
3.	Tennis Equipment	4,427.50	2,727.50		1,700.00
4.	Inspirational Materials	1,593.75	1,593.75		-
5.	General & Administrative Rate (10%)	1,442.13	-		1,442.13
6.		\$15,863.38	\$12,221.25		\$3,642.13

\*During application review, you may be asked for further financial information or for proof of any matching funds

### PART 4: AWARENESS AND VISIBILITY

**Describe the plan for promoting this project within the City of San Luis Obispo.**

As we did for our Tennis Playday events, we'll have promotion through the Boys and Girls Clubs marketer. We issued press releases in the Santa Maria Times, had event radio shows and was covered in San Luis Obispo magazine. We could do some

television given Pancho's legacy. We can also pursue Spanish media venues We've had Telemundo attend one of our events that was shown nationally.

**How will you highlight the City's support of your project?**

All promotion materials will highlight the City's as primary supporter. We will also have printed programming and inspirational materials that could include the City's logo. We will have onsite banners that will include all the supporting organizations logos. The programming could also be highlighted in the USTA Southern California Section's marketing department. We can also pursue Spanish media venues such as articles on Pancho's career and the programming.



**PART 5: CERTIFICATION**

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person Completing this Application:****Signature:**

/signed/ Gregory Gonzales – a signed pdf copy to be provided with the application

**Title:**

Executive Director/Vice President

**Date:**

08/31/2022

**Application Checklist**

*Use this checklist as a tool to ensure all required components are submitted with your final application.*

**I have included all of the following documents, in hard copy or via the online site:**

- ☐ Completed Grant Application
- ☐ List of Organization's current Board Members or leadership body
- ☐ Organizational Chart
- ☐ Copy of Document Certifying Federal Tax-Exempt status, if applicable

My Final Application includes all documents listed above, submitted by **5:00 pm on August 31st, 2022**, via one of the following methods:

- ☐ The online application site: <https://forms.slocity.org/Forms/2022-2023-FUNDING-FOR-HIGH-IMPACT-DEI-PROGRAMS>
- X One (1) signed application, including all attachments, in PDF format, submitted via email to **DEI@slocity.org**
- ☐ One (1) signed application, including all attachments, submitted via Hard Copy, either in person or by email to:  
DE&I Task Force  
919 Palm St. San Luis Obispo, CA 93401  
Attn: Dale Magee

*Postmarks will not be accepted*

INTERNAL REVENUE SERVICE

DEPARTMENT OF THE TREASURY

P. O. BOX 2508

CINCINNATI, OH 45201

Date: JUN 18 2013

RICHARD PANCHO GONZALEZ YOUTH  
FOUNDATION  
14602 W CATALINA DR  
GOODYEAR, AZ 85395-8343

Employer Identification Number:  
80-0816999

DLN:

17053270372032

Contact Person:

JACOB A MCDONALD

ID# 31649

Contact Telephone Number:

(877) 829-5500

Accounting Period Ending:

December 31

Public Charity Status:

170(b)(1)(A)(vi)

Form 990 Required:

Yes

Effective Date of Exemption:

April 23, 2012

Contribution Deductibility:

Yes

Addendum Applies:

No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

knowledge, I agree to comply with the requirements of the City of the San Luis Obispo.

DocuSign Envelope ID: C8CFE5B2-B038-4C4A-90F5-9A3ECAA12DE

Name of Person Completing this Application:

Signature:

Title:

Date:

#### Application Checklist

Use this checklist as a tool to ensure all required components are submitted with your final application.

I have included all of the following documents, in hard copy or via the online site:

- ☒ Completed Grant Application
- ☒ List of Organization's current Board Members or leadership body
- ☒ Organizational Chart
- ☒ Copy of Document Certifying Federal Tax-Exempt status, if applicable

My Final Application includes all documents listed above, submitted by 5:00 pm on August 31st, 2022, via one of the following methods:

- ☐ The online application site: <https://forms.slocity.org/Forms/2022-2023-FUNDING-FOR-HIGH-IMPACT-DEI-PROGRAMS>
- ☒ One (1) signed application, including all attachments, in PDF format, submitted via email to [DEI@slocity.org](mailto:DEI@slocity.org)
- ☐ One (1) signed application, including all attachments, submitted via Hard Copy, either in person or by email to:  
DE&I Task Force  
919 Palm St. San Luis Obispo, CA 93401  
Attn: Dale Magee

Postmarks will not be accepted



PROVIDING THE UNDERSERVED AND OTHER YOUTH  
THE OPPORTUNITY TO PLAY TENNIS AND LEARN

Don



Staff

HOME > Staff



Dan Gonzales

Co-Founder | President | Board Chairman

Son of Pancho Gonzalez, Dan has a background in tennis instruction and tennis facility management along with many years of sales and management experience in the sporting goods industry. He has served as Director and Board Member for several tennis organizations, including the Colorado Tennis Association and the Intermountain sections of the United States Tennis Association (USTA). He currently works as a tennis professional at a community tennis club and coaches boys and girls local high school tennis teams.

Share

f



Greg Gonzales

Co-Founder | Vice President | Board Member

Pancho's nephew, Greg, has been around tennis all his life and has worked as a tennis instructor for several years. He worked at the Caesars Palace Tennis Shop and helped run the Alan King Tennis Classic Professional Tournament. In recent years, he has helped fundraise and organize events during the USTA's Hispanic Initiative, including the USTA tribute to Pancho Gonzalez held at the US Open in 2009. He has published a children's book entitled, "Tennis Legend Pancho Gonzalez" and was Associate Producer on Spike Network's national broadcasted biography on Pancho Gonzalez, "Pancho Gonzalez: Warrior of the Court."

Richard Gonzales

Director of Tennis Programming | Board Member

Pancho's eldest son, Richard, is a professional tennis instructor with an extensive history of player development and tennis event and tournament operations. Richard's instruction work began at the Pancho Gonzalez Tennis Ranch, located in the Santa Monica mountains northwest of Los Angeles, CA. The Tennis Ranch was a summer camp for young people who wanted to learn and improve their tennis skills. Subsequently, Richard was appointed Assistant Tennis Director for Caesars World, Inc., headquartered at Caesars Palace in Las Vegas, NV. Throughout the years, Richard was able to work alongside his father to gain valuable experience in coaching, training, and tennis event development and management, including Las Vegas Virginia Slims WCT and Alan King Tennis Classic events. Richard, along with his father, won three national father and son titles, one clay, and two indoor titles. He currently resides in Bakersfield, CA, continuing to teach and share his extensive knowledge of tennis.

Salvatore "Sal" De Leva

Board Member

Sal has been involved in the game of tennis since his arrival from Italy in his youth. Sal started and was the publisher of Tennis Life magazine for the Washington D.C. area and has served in various USTA positions, which culminated his position as President of the Maryland District for two terms and the Mid-Atlantic section for one term. During this period he was also a member of the

NJTL and Public Relations committees at the national level. In 2006, shortly after leaving the USTA, he decided to return to Washington D.C. and convince the Latin American Youth Center to begin a tennis program targeting the kids of the large Hispanic community. Sal began the “Pancho Gonzalez Youth Tennis Academy,” which was a huge success. Presently, Sal continues to volunteer for the Academy, and organizes a year-round junior tournament circuit in the Washington D.C. area.

CONTACT US

RICHARD PANCHO GONZALEZ  
YOUTH FOUNDATION

**Address -**  
P.O. Box 7693  
Goodyear, AZ 85338

**Phone:** [623.414.1012](tel:623.414.1012)  
**E-mail:** [info@panchofoundation.org](mailto:info@panchofoundation.org)

OUR MISSION

To inspire and enhance the lives of today’s youth through physical fitness, academic pursuit and character building through the sport of tennis.

NJTL

The RPGYF is a proud National Junior Tennis and Learning (NJTL) Chapter

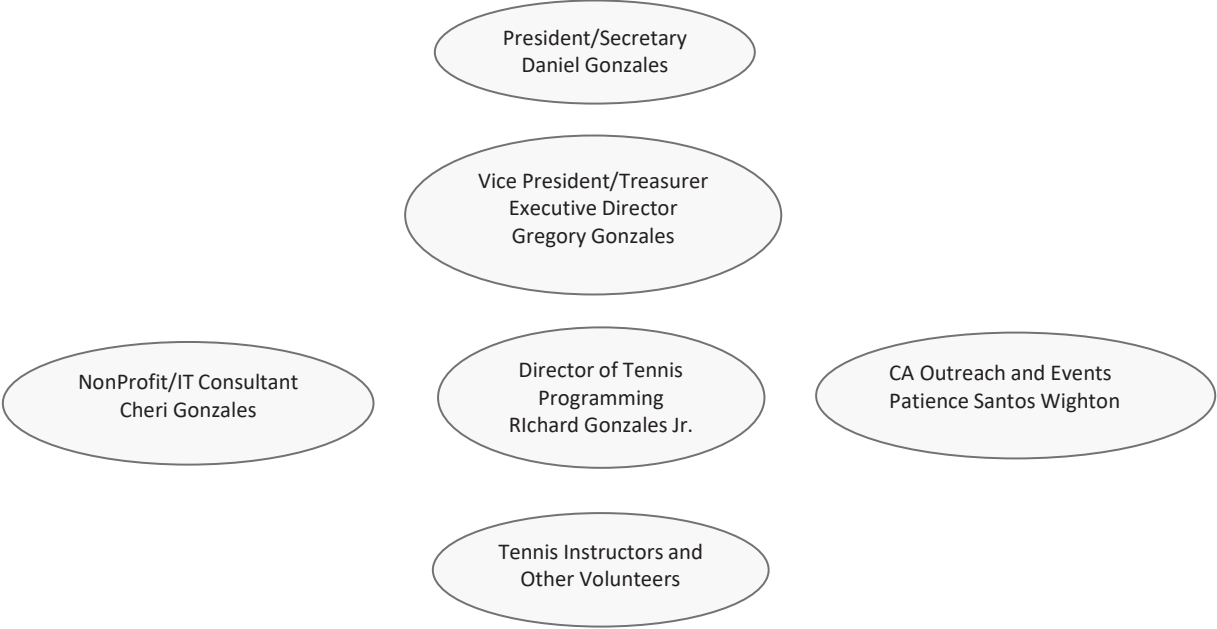
SUBSCRIBE TO OUR EM

First Name \*

Last Name \*

Email \*

**Richard Pancho Gonzalez Youth Foundation Organizational Chart**



**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)



Certificate Of Completion

Envelope Id: C8CFE5B2B0384C4A90F59A3ECAAA12DE

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Daniel Clancy

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990 Palm Street

Envelopeld Stamping: Enabled

San Luis Obispo, CA 93422

dclancy@slocity.org

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11/17/2022 11:24:19 PM

dclancy@slocity.org

Signer Events

Gregory Gonzalez

Signature

Timestamp

greg@panchofoundation.org

DocuSigned by:

Gregory Gonzalez

981A8D70E6EB418...

Sent: 11/17/2022 11:27:23 PM

Vice President

Viewed: 11/18/2022 7:17:40 AM

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Signature Adoption: Pre-selected Style

Using IP Address: 98.177.235.96

Electronic Record and Signature Disclosure:

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Mark Amberg for Christine Dietrick

Signature

Timestamp

mamberg@slocity.org

DocuSigned by:

Mark Amberg for Christine Dietrick

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Sent: 11/25/2022 4:55:24 PM

Assistant City Attorney

Viewed: 11/28/2022 3:04:02 PM

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Signature Adoption: Pre-selected Style

Using IP Address: 104.129.198.252

Electronic Record and Signature Disclosure:

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Greg Hermann for Derek Johnson

Signature

Timestamp

ghermann@slocity.org

DocuSigned by:

Greg Hermann for Derek Johnson

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Sent: 11/28/2022 3:04:21 PM

Deputy City Manager

Viewed: 11/28/2022 3:23:40 PM

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Signed: 11/28/2022 3:23:53 PM

Signature Adoption: Pre-selected Style

Using IP Address: 104.129.202.83

Electronic Record and Signature Disclosure:

Accepted: 11/28/2022 3:23:40 PM

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Editor Delivery Events	Status	Timestamp
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Intermediary Delivery Events	Status	Timestamp

Certified Delivery Events	Status	Timestamp
<b>Carbon Copy Events</b>		
Matt Melendrez mmelendr@slocity.org Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 12/14/2022 6:19:31 PM ID: 02a0a1c7-8b1f-4f3e-a5f6-f78190bef4bc	COPIED	Sent: 11/28/2022 3:23:56 PM Viewed: 1/12/2023 3:10:03 PM
Gregory Gonzalez greg@panchofoundation.org Vice President Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 11/18/2022 7:17:40 AM ID: fe4fbe3b-c332-4ed5-89a5-78def22baacb	COPIED	Sent: 11/28/2022 3:23:57 PM
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
<b>Envelope Summary Events</b>		
Envelope Sent	Hashed/Encrypted	11/17/2022 11:27:23 PM
Certified Delivered	Security Checked	11/28/2022 3:23:40 PM
Signing Complete	Security Checked	11/28/2022 3:23:53 PM
Completed	Security Checked	11/28/2022 3:23:57 PM
Payment Events	Status	Timestamps
<b>Electronic Record and Signature Disclosure</b>		

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**Withdrawing your consent**

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

**Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of your DocuSign account. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use your DocuSign Express user account to receive required notices and consents electronically from us or to sign electronically documents from us.

**All notices and disclosures will be sent to you electronically**

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through your DocuSign user account all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

**How to contact Carahsoft OBO City of San Luis Obispo:**

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: [keriksso@slocity.org](mailto:keriksso@slocity.org)

**To advise Carahsoft OBO City of San Luis Obispo of your new e-mail address**

To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address..

In addition, you must notify DocuSign, Inc to arrange for your new email address to be reflected in your DocuSign account by following the process for changing e-mail in DocuSign.

**To request paper copies from Carahsoft OBO City of San Luis Obispo**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.

**To withdraw your consent with Carahsoft OBO City of San Luis Obispo**

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your DocuSign account, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail, full name, IS Postal Address, telephone number, and account number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

**Required hardware and software**

Operating Systems:	Windows2000? or WindowsXP?
Browsers (for SENDERS):	Internet Explorer 6.0? or above
Browsers (for SIGNERS):	Internet Explorer 6.0?, Mozilla FireFox 1.0, NetScape 7.2 (or above)
Email:	Access to a valid email account
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	<ul style="list-style-type: none"> <li>•Allow per session cookies</li> <li>•Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection</li> </ul>

\*\* These minimum requirements are subject to change. If these requirements change, we will provide you with an email message at the email address we have on file for you at that time providing you with the revised hardware and software requirements, at which time you will have the right to withdraw your consent.

**Acknowledging your access and consent to receive materials electronically**

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

By checking the 'I Agree' box, I confirm that:

- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Carahsoft OBO City of San Luis Obispo as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by Carahsoft OBO City of San Luis Obispo during the course of my relationship with you.

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/5/2022 | 1:35 PM, PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and San Luis Coastal Education Foundation (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to Students of Promise Initiative as submitted in its application to the CITY on August 31, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023, to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$15,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

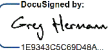
San Luis Coastal Education Foundation  
1500 Lizzie Street  
San Luis Obispo, CA 93401  
crobertson@slcUSD.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
DocuSigned by:  
Christine Robertson  
FDDDF78B882411...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
DocuSigned by:  
Greg Hermann  
1E9343C5C66D48A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
DocuSigned by:  
Mark Amberg for Christine Dietrick  
49590B18C87B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

Exh. A

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION



**Organization Name:** \*

San Luis Coastal Education Foundation

**Year Established:** \*

2017

**Fiscal Agent, if different than above:** \*

N/A

**Tax ID #:** \*

824196024

**Document Certifying Federal Tax-Exempt status, if applicable**

IRS 501c3 Determination Letter.pdf

69.47KB

**Name of Executive Director (or highest leadership position)**

Christine Robertson

**Approximate Annual Budget:**

719,000

**Major Sources of Funding:**

Foundation endowment and community fundraising

**Mission Statement:**

San Luis Coastal Education Foundation's mission is to provide resources and opportunities for excellence in teaching, promote innovation in learning, and partner with the community to enhance the quality of education for all students.

**Number of paid staff (full- or part-time):**

2

**Number of volunteers:**

25

**Name of Board President or Chair:**

David Mitchell

**Organizational Leadership Chart** \*

SLCEF org chart 8.22.pdf

43.39KB

**Name of Person completing this Application:**

Becca Carsel



**Organization Mailing Address: \***

Street Address

1500 Lizzie Street

Address Line 2

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93401

Country

USA

**Phone: \***

805-549-1300

**E-mail: \***

crobertson@slcusd.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

As the district's innovation arm, the San Luis Coastal Education Foundation works to foster a collaborative community of learning in which the best ideas are surfaced, supported, and shared. We are future-focused, working to elevate all students and prepare them to compete in a rapidly changing and dynamic world.

The San Luis Coastal Education Foundation works to achieve its mission by making investments toward the following goals:

- \* Elevate opportunity and achievement for all students by fostering an inclusive culture of deep and continuous learning.
- \* Eliminate barriers to student achievement.
- \* Empower teachers to dream big and pursue cutting-edge innovations in teaching.
- \* Engage the community in ensuring a quality education that prepares our students for future personal and professional success.

The Foundation has an independent but integrated relationship with the school district. The Foundation is led by a separate governing board, but includes representatives from the district's Board of Trustees and district administration. This ensures that the district is actively involved in shaping the Foundation's programs to ensure effective implementation and sustainable adoption. The Foundation's Executive Director works out of the district Superintendent's office, affording the Foundation continual access to decision-makers responsible for helping steward the Foundation's investments. This deep integration across both organizations creates a powerful partnership that leverages resources, improves efficiency and maximizes impact.

In this partnership model, programs are developed collaboratively by the Foundation and district, with both organizations committing complementary resources. The Foundation's focus is on making proof-of-concept investments that, if successful, can be adopted and institutionalized by the district.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

The San Luis Coastal Education Foundation supports students in San Luis Coastal Unified School District, a PreK-12 school district of 7,500 students. Approximately two-thirds of the district's students live in San Luis Obispo and outlying areas, while one-third live in Los Osos and Morro Bay. Over one-third of students are socioeconomically disadvantaged, meaning that they either qualify for the free/reduced price meal program or have a parent who did not graduate from high school. English Learners comprise 10% of students. Sixty percent of students are white, 30% are Hispanic, 6% are multi-racial, 3% are Asian, 2% are Filipino, and 1% are African American.

**PART 2: PROJECT INFORMATION****Name of DE&I Project \***

Students of Promise Initiative

**Est. number of people served through this project: \***

50

**Est. number of SLO CITY RESIDENTS served through this project \***

30

**Total Project Cost: \***

107,667

**AMOUNT OF CITY FUNDING REQUESTED: \***

30,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

Within San Luis Coastal Unified School District (SLCUSD), 27% of 6th and 7th graders do not have a parent who graduated from college, and 15% do not have a parent who completed any college classes. BIPOC students who will also be first generation college students make up 12.8% of SLCUSD's current 6th grade class and 12.3% of the current 7th grade class. These students are generally in lower socioeconomic households and are not nearly as successful at college readiness and admissions as their wealthier counterparts.

While nearly 80% of high school students who are not socioeconomically disadvantaged complete the required high school classes for admission into the UC/CSU system, fewer than half (45%) of students who are socioeconomically disadvantaged are completing these requirements by graduation (2019-20 data). This issue starts in 6th grade, when students take a math placement test that determines access to advanced math classes in middle school and facilitates college-track math classes in high school. In the 7th grade advanced math classes, only 10% of students are socioeconomically disadvantaged, though they comprise 33% of the 7th grade student body (2018-19 data).

For these students, navigating the college preparation process is fraught with barriers. In interviews with first-generation college-bound SLCUSD students, they explained that one of the greatest challenges on their journey was the need for parent and guardian engagement, education, and involvement. Many of these students do not have parental encouragement to aim for a college degree. They also lack caregivers with the lived experience to help them make the middle and high school course selections that will prepare them for college entry or to figure out the complicated college entrance process. And first-generation students struggle to see themselves as college-bound despite academic success in school. Finally, for those who do maintain the vision of college entry, the cost of college applications, testing requirements (SAT, ACT) and AP exams can be prohibitive.

To help ensure that all our district's students have equal access to college degrees, the San Luis Coastal Education Foundation is proposing a pilot program, Students of Promise, to support first-generation students from 6th through 12th grades as they become college-ready. The program's life-changing goals are to ensure that the participants are ready for entrance to four-year universities and for successful college degree attainment. Program participants will have a guaranteed "pre-scholarship" fund of up to \$1,000 to draw from for AP exams, tutoring, college entrance exams and college applications. Even more important, two staff members will support them from 6th through 12th grade.

A new Students of Promise Family Liaison will build relationships with families and support parents/guardians to help students achieve their college goals. This Family Liaison is an outreach position created based on feedback from graduating first-generation students. The position will advocate with parents and guardians about the importance of a college degree for their child and empower parents to understand what steps their child should take to be prepared for and get accepted to a university. Providing parents with this knowledge gives them dignity, avoiding role reversals of children having to explain academic processes to parents. The Family Liaison will engage respectfully with parents and guardians, helping them to set academic goals and then customizing outreach to ensure that each student is supported to meet their goals.

Middle school is a critical time for prerequisite classes necessary to take all the high school classes required by the CSU and UC systems. And 6th graders take a math placement test that determines access to advanced math classes in middle school and facilitates college-track math classes in high school. To support Students of Promise participants academically as they begin the program, a middle school counselor has been hired by the school district specifically to provide academic counseling for first-generation 6th-8th graders, including Students of Promise. This second staff member will ensure that younger students maintain the option of college while gaining the academic skills and knowledge needed to succeed in high school and college.

The pilot program will include 50 students from the City of San Luis Obispo and from SLCUSD's coastal schools in Morro Bay and Los Osos who would be first-generation college graduates. Between 30-35 of these students are expected to be from the City of San Luis Obispo based on enrollment data. Students will be chosen based on background demographics, with first priority to students of color who are low-income and whose parents have not attended college. The cohort will include English Learners who may be struggling in their academic achievement because of language barriers but show potential to succeed over time.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

The program will support low-income children in 6th-12th grade whose parents/guardians never attended college, with a primary focus on students of color. Students who are both socioeconomically disadvantaged and first generation college students make up 5.2% of the current 6th grade class and 6.1% of the 7th grade class, and almost all of these students are also BIPOC. The majority of students whose parents have not attended college feel disconnected from school by the time they reach 11th grade. At this time when other students are touring universities and planning application strategies, fewer than half of 11th students with parents who did not attend college feel connected to school and only 34% of students whose parents did not receive a high school degree feel connected to school (CA Healthy Kids Survey 2020).

**Describe the equity gaps and community needs this project will address.**

San Luis Coastal Unified School District has historically been a school district with a majority of middle class to wealthy families. However, BIPOC students who will also be first generation college students make up 12.8% of SLCUSD's current 6th grade class and 12.3% of the current 7th grade class. Low-income students, especially students of color, have often been marginalized, particularly in individual schools with many wealthier students. Internal work over the past few years to adopt an equity lens throughout the district has seen results ranging from new homework policies that do not expect purchases by families to increased access to Advanced Placement classes.

The need for this project emerged from these discussions and was targeted by the San Luis Coastal Education Foundation because it provides a model that could be expanded to increase equitable access to college throughout the district. This model can provide a long-term benefit to hundreds of local children who will be able to reach their academic potential and earn more throughout their lifetimes with a college degree. For students who decide they will benefit more from a technical school education, this program will give them the academic preparation they need to learn in any environment and the knowledge for them and their families of how to navigate any admissions and financial aid system. Students of Promise will create equal life options for our lower-income students from homes without a college graduate.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
# of students enrolled in Students of Promise	100% increase by the end of 2023
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
% of participants listing college as a goal	80% increase by the end of 2023
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
% of parents/guardians listing college as a goal	80% increase by the end of 2023

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner	Activity/Service They Provide for This Project
Example: ABC Business	Example: Free Use of Space for Weekend Classes
San Luis Coastal Unified School District	Identification of students, hosting of program, academic counseling for middle schoolers in the program, basic needs support by family advocates

**Provide the timeline for this proposed project.**

Feb 2023 – hiring of Family Liaison  
Mar 2023 – recruitment of pilot class of 6th graders  
Apr-May 2023 – outreach to families by both Family Liaison and academic counselor to encourage 6th grade advanced math test participation and registration for middle school college preparatory classes  
June-Aug 2023 – summer outreach to families, goal setting  
Sept-Dec 2023 – fall outreach to families, support for 7th grade coursework

**Describe your plan for sustainability beyond the City’s one-year award funding, if applicable.**

Funding by the City of San Luis Obispo will allow the San Luis Coastal Education Foundation to demonstrate the concept of this program, particularly the innovative Family Liaison position that will empower families to have the knowledge and vision needed to support their child becoming a college graduate. As the program takes root, the Education Foundation will recruit additional partners to continue testing and expanding the concept. In the long term, it is expected that the value of the program to first-generation students will be demonstrated and the school district will work with the Education Foundation to institutionalize the strategy.

**PART 3: PROJECT COST / BUDGET**

Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Family Liaison, 1 FTE, includes benefits	\$ 47,667.00	\$ 30,000.00	\$ 17,667.00
2 Middle school academic counselor, 0.1 FTE, includes benefits	\$ 10,000.00	\$ 0.00	\$ 10,000.00
3 Pre-scholarships for 50 7th graders, for college applications and testing (funds set aside and held in reserve until needed)	\$ 50,000.00	\$ 0.00	\$ 50,000.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

**PART 4: AWARENESS AND VISIBILITY**

**Describe the plan for promoting this project within the City of San Luis Obispo.**

The Students of Promise initiative will be promoted within the City through press releases to local media and publicity on the San Luis Coastal Education Foundation website, in our newsletter, and through our social media channels. As students reach high school graduation, college entrance successes will be publicized through local media.

**How will you highlight the City’s support of your project?**

The San Luis Coastal Education Foundation will thank the City of San Luis Obispo for the generous support of the Students of Promise initiative through acknowledgments on our website and in our annual report, an article in our newsletter, publicity through our social media channels, and a press release to local media. Program updates are communicated through our social media channels and newsletter and results are communicated in our annual report.

**PART 5: CERTIFICATION**

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person completing this Application: \***

Becca Carsel

**Signature \***

A rectangular box containing a handwritten signature in black ink that reads "Becca Carsel".

**Title: \***

Grant writer

**Date: \***

8/31/2022

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **NOV 13 2018**

SAN LUIS COASTAL EDUCATION  
FOUNDATION  
1506 LIZZLE ST  
SAN LOIS OBISPO, CA 93401

Employer Identification Number:  
82-4196024  
DLN:  
17053170338028  
Contact Person: **CHRIS BROWN** ID# 31503  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990/990-EZ/990-N Required:  
Yes  
Effective Date of Exemption:  
August 28, 2017  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.



Letter 947

SAN LUIS COASTAL EDUCATION

Sincerely,

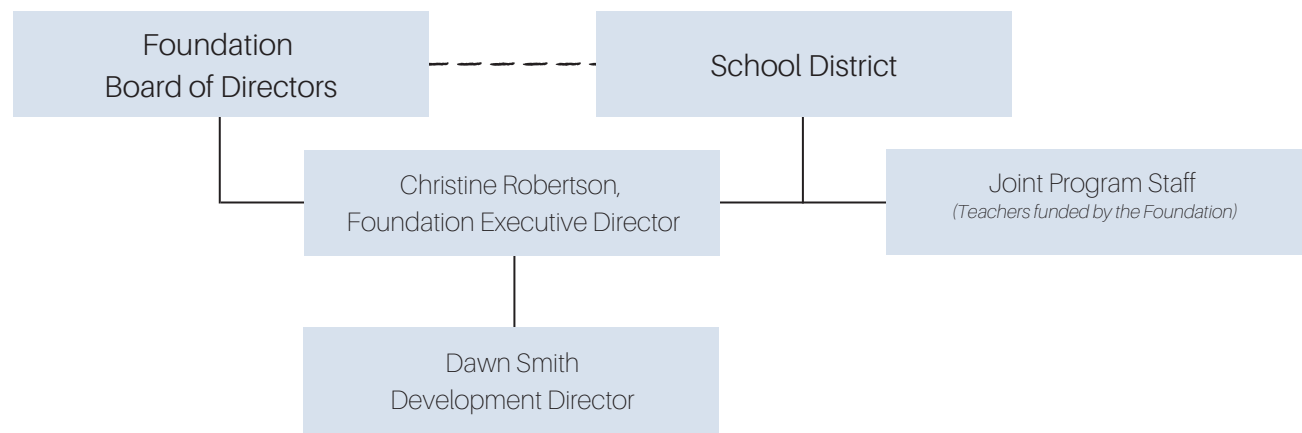
*Stephen A. Martin*

Director, Exempt Organizations  
Rulings and Agreements



# San Luis Coastal Education Foundation

## Organizational Chart



### SAN LUIS COASTAL EDUCATION FOUNDATION

#### Executive Committee

David Mitchell, Board Chair  
Stacey White, Treasurer  
Beth Marino, Secretary  
Ben McAdams  
Lindsey Haring  
Diane Frost  
Dr. Eric Prater (non-voting)

#### Board of Directors

Erica Flores Baltodano  
Dave Bernhardt  
Sam Blakeslee  
Kell Cole  
Lindsey Haring  
Ron Holcombe  
Melissa James  
Steve Jobst  
Jim Quesenberry  
Rick Robinett  
Clint Slaughter  
Bill Thoma  
Matthew Woods  
Ryan Pinkerton  
Rick Mayfield  
Kathryn Eisendrath-Rogers

### SAN LUIS COASTAL UNIFIED SCHOOL DISTRICT

#### Cabinet Team

Dr. Eric Prater, Superintendent  
Diane Frost, Assistant Superintendent  
Ryan Pinkerton, Assistant Superintendent  
Leslie O'Connor, Director of Secondary Instruction  
Rick Mayfield, Director of Elementary Instruction  
Dan Block, Director of Human Resources  
Janet Gould, Director of Student Support Services

#### SLCUSD Board of Trustees

Chris Unger  
Ellen Sheffer  
Marilyn Rodger  
Evelyn Frame  
Mark Buchman  
Kathryn Eisendrath-Rogers  
Eve Dobler-Drew

**Note: Shaded names denote joint participation in both SLCEF and SLCUSD**

**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermannn, Assistant City Manager, (ghermannn@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/5/2022 | 1:52 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Central Coast Coalition for Undocumented Student Success (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to the Undocu-Summit and expansion of steering committee as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$24,900, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:


CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

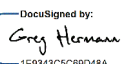
GRANTEE:  
Central Coast Coalition for Undocumented Student Success  
Adrienne Garcia-Specht  
PO Box 15759  
San Luis Obispo, CA 93406  
ccc.undocu@gmail.com

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
F44452F909CD420...  
Adrienne Garcia-Specht, Steering Committee Member

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E9343C5C8BD48A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
49590B18C87B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

## 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

### PART 1: APPLICANT INFORMATION



**Organization Name: \***

Central Coast Coalition for Undocumented Student Success (CCC-USS)

**Year Established: \***

2015

**Fiscal Agent, if different than above: \***

Ecologistics

**Tax ID #: \***

272116150

**Document Certifying Federal Tax-Exempt status, if applicable**

CCC-USS\_Ecologistics\_2022.pdf

1.11MB

**Name of Executive Director (or highest leadership position)**

N/A

**Approximate Annual Budget:**

50,171

**Major Sources of Funding:**

During the prior year, the organization utilized the following funding sources: \$10,200 - San Luis Obispo City Diversity Equity & Inclusion Taskforce High Impact Program Funding: Undocu Community Summit (no cost extension) \$13,350 - SLO County UndocuSupport Fund Emergency Aid Grant \$26,621 - tax-deductible donations between 1/1/21 to 12/31/21 Total for prior year: \$50,171

**Mission Statement:**

The Central Coast Coalition for Undocumented Student Success (CCC-USS) is a collective of advocates and educators that challenges anti-immigrant and oppressive ideologies, institutional practices, and everyday actions that threaten undocumented and historically marginalized communities. Through our work together, our vision is to create social change to ensure educational equity for all students and build capacity to support undocumented students in our region.

**Number of paid staff (full- or part-time):**

0

**Number of volunteers:**

30

**Name of Board President or Chair:**

The organization is led by a steering committee. During the prior year, the organization's steering committee was composed of 6 volunteers (listed below). Four steering committee members are continuing for the next year period (\*) and recruitment for additional steering committee members is ongoing Adrienne Garcia-Specht\* Jane Lehr\* Jannet Rios Leon Briana Ronan Catherine Trujillo\* Oscar Velasco-Vargas\*

**Organizational Leadership Chart \***

2022 organization chart.pdf 84.17KB

**Name of Person completing this Application:**

Adrienne Garcia-Specht

**Organization Mailing Address: \***

Street Address

PO Box 15759

Address Line 2

City

San Luis Obispo

Postal / Zip Code

93406

State / Province / Region

CA

Country

USA

**Phone: \***

8054585192

**E-mail: \***

ccc.undocu@gmail.com

**Briefly describe your organization’s mission, primary activities, and operating structures.**

Founded in 2015, the Central Coast Coalition for Undocumented Student Success (CCC-USS) is a collective of advocates and educators that challenges anti-immigrant and oppressive ideologies, institutional practices, and everyday actions that threaten undocumented and historically marginalized communities. Through our work together, our vision is to create social change to ensure educational equity for all students and build capacity to support undocumented students in our region. CCC-USS was founded by staff and faculty from Allan Hancock College, California Polytechnic State University (Cal Poly), and Cuesta College and includes K-12 representatives and other community partners in San Luis Obispo and Northern Santa Barbara counties.

We are an all-volunteer organization led by a volunteer steering committee of coalition members from across the Central Coast. We have a decentralized leadership, and we use this steering committee structure to set and accomplish goals. All the members are connected to education, either as current students, faculty or staff of Cal Poly, Allan Hancock College, and Cuesta College, or are current or retired K-12 educators. The membership of the coalition is majority Latinx.

During the prior year, our primary activities included:

Organize the first Central Coast Undocu Community Summit in April 2022 to:

Raise awareness of and address issues facing the undocumented community in San Luis Obispo

Celebrate undocujoy and hear from the undocumented community directly

Bring together the undocumented community and allies in one place (virtual or physical) in order to collaborate, build community, and help all organizations and individuals working with the undocumented community to achieve goals that will have a lasting impact on community

Explore opportunities to integrate organizational data and community knowledge to form a more holistic understanding of the range of undocumented experiences in our community, as well as specific barriers that we can collectively address in future work together

Community Mapping/Focus Groups: In collaboration with SLO County UndocuSupport Fund, MICOP (Mixteco/Indigena Community Organizing Project) and the Promotores Collaborative of San Luis Obispo (associated with the Center for Family Strengthening), amongst other partners, CCC-USS led community mapping/needs assessment activities in San Luis Obispo County. A focus group protocol was designed, tested, and translated. Seven focus groups have occurred to date: 2 hosted by MICOP; 3 hosted by the Promotores Collaborative; and 2 hosted by CCC-USS. Initial results were shared at the April 2022 Undocu Community Summit. This work is ongoing with upcoming focus groups taking place in Los Osos/Morro Bay and City of San Luis Obispo.

Organize the 5th Annual Social Justice Education Conference in May 2022 in collaboration with the Cal Poly School of Education. The theme was "Rebel in Bloom: Cultivating Just Futures" and focused on our collective work to name and challenge forms of oppression by bringing together local educators and activists committed to racial justice.

The hybrid event included a virtual keynote (Noreen Naseem Rodríguez, Assistant Professor of Teacher Learning, Research, and Practice in the School of Education and Affiliate Faculty in the Department of Ethnic Studies at the University of Colorado Boulder) and virtual panel (Youth Activists: Mel González, Ana López Isidro; MICOP -Tequio Youth Group Organizing Manager: Dalia García; Teachers: Gabriela Márquez Clark and Manuela Cruz).

This was followed by an in-person Curriculum Fair that hosted students, faculty, staff and local K-12 educators who presented on topics, lesson plans/units, and instructional resources that advance social and racial justice via poster sessions and roundtable discussions.

Fundraise and award financial assistance, including Emergency Aid (\$19,000), DACA renewal grants (\$9,900), and Educational Fee Support grants (\$1,000)

Recruit and supervise 3 interns from the UCSB Poverty, Inequality, and Social Justice minor program.

CCC-USS is a fiscally sponsored organization under Ecologistics, a 501(c)(3) public charity in San Luis Obispo, California. CCC-USS's fiscal sponsorship with Ecologistics began in May 2018.

**Describe the community(ies) your organization supports.**



Please be specific in the population and geographic area.

CCC-USS supports undocumented students and students in mixed-status families in San Luis Obispo and Northern Santa Barbara counties. According to the Pew Hispanic Center, California is home to 24% of the nation's undocumented immigrants and we are also the state with the largest number of undocumented students.

The State of California estimates that there are 300,000 undocumented students in the PK-12 system in California and one million students with an undocumented parent. The Campaign for College Opportunity estimates that at least 75,000 undocumented students are enrolled in California's public and independent colleges and universities (only 10% of each undocumented student cohort who graduate high school). Edsource reports that there are estimated 4,000 undocumented students in the UC system; 9,500 in the CSU system; and at least 50,000 undocumented students in the California Community College system. According to the Urban Institute, most of these college-enrolled and college-bound undocumented students have "lived in the United States most of their lives; were brought to the United States by their parents at a young age; learned English and think of themselves as American; attended elementary, middle, and high school in this country; excelled academically in high school and want to pursue a college education; and currently lack a way to become legal residents or citizens in the United States."

A new report by the UC Merced Community and Labor Center (March 2022) included the following findings related to the impact of the Covid-19 pandemic on undocumented immigrants in California: 1) Over one million California workers, or six percent of the workforce, are undocumented, filling one in sixteen jobs and generating billions of dollars in \$3.7 billion in state and local tax revenues and \$7.0 billion in federal tax revenues; 2) Undocumented workers face far greater levels of economic insecurity; twice as many noncitizen workers (38%) live below a "living wage" than citizen workers (18%); 3) Most children living with at least one undocumented relative experience economic insecurity. More than six in ten (61%) children living in noncitizen worker households live below a living wage, compared with 36% of other children in worker households; and 4) In the first year of the pandemic, California unemployed citizen workers were eligible for up to 20 times as much economic aid as unemployed undocumented workers (\$35,000 vs \$1,700).

San Luis Obispo County has approximately 8,600 undocumented residents who pay taxes in the county based on 2017 figures from the Institute on Taxation and Economic Policy (ITEP). However, it is challenging to estimate the undocumented population within the City of San Luis Obispo, because we have so little sources for data. We have estimated that for college-age student populations at Cuesta College and Cal Poly. Based on California Dream Act applications, the estimates are approximately around 465 students between Cal Poly and Cuesta College.

## PART 2: PROJECT INFORMATION



### Name of DE&I Project \*

CCC-USS Undocu Student Community Summit & Organizational Transformation and Sustainability

### Est. number of people served through this project: \*

220

### Est. number of SLO CITY RESIDENTS served through this project \*

100

### Total Project Cost: \*

67,176

### AMOUNT OF CITY FUNDING REQUESTED: \*

50,976

### Describe your proposed project or program.

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

(Please let me know if you would prefer a PDF or doc of the proposal)

Undocu & Student Community Member Steering Committee Participation Stipends

During the grant period, we propose to recruit and fund members of the SLO City, SLO County, and Northern Santa Barbara County undocumented communities to participate as steering committee members and in the proposed strategic visioning/planning process. While CCC-USS works in partnership with undocumented community members, no members of our all-volunteer steering committee are currently or formerly undocumented. In addition, no members of our current steering committee are students. This is a

significant weakness in our approach, and, if continued, will undermine the work of the organization, the proposed strategic visioning/planning, and the sustainability of this effort.

#### Costs/Participants:

4 stipends of \$600 for new steering committee member participation; at least 1 of 4 new members will be located in SLO City and at least 2 of 4 total new members will be located in SLO County (continuing steering committee members will not receive a stipend)

New Steering Committee members will be recruited specifically to support the Direct Aid Program, the Undocu Student Summit (specifically provide support and development opportunities for the student organizers), and to grow existing and create new institutional relationships in PK-12 and higher education on Central Coast.

#### Strategic Visioning/Planning for Maximum Impact & Sustainability

CCC-USS has existed for 7 years and been fiscally sponsored for 5 years as an all-volunteer organization. We are undergoing significant changes in our all-volunteer steering committee membership due to life and professional transitions. The SLO City, SLO County, and Central Coast landscape of resources available to support undocumented students and broader communities is also significantly different than at the time of our founding. These changes in landscape include the creation of centers for undocumented students at Allan Hancock, Cuesta, and Cal Poly and the provision of legal support for undocumented students, faculty, and staff at these campuses. In addition, many new organizations have formed including SLO County UndocuSupport Fund, Allies for Immigration Justice, and the Santa Barbara-based Immigrant Legal Defense Center. Other changes include the further activation and growth of initiatives and organizations providing support and resources, including CAP-SLO, the Center for Family Strengthening, MICOP, CAUSE, and more.

We request funding to support the activities of an external consultant to facilitate strategic visioning/planning for the organization during the grant period. We primarily wish to focus on how CCC-USS can most effectively utilize time, financial resources, and other in-kind resources to achieve the organizational mission for the next 5-10 years to make the biggest difference in SLO City, SLO County, and Northern Santa Barbara County. We expect that this exploration will include organization and program sustainability, discussion of types of fiscal sponsorship, non-profit status, future funding, connections to PK-12 schools, and the possibility of shifting from an all-volunteer organization.

Costs/Participants: \$6,600 (external consultant, simultaneous translation, material translation); 8 participants (volunteer steering committee members, at least 3 of whom will live in SLO City)

#### Student-Focused Undocu Summit

Building from the success of the prior 2022 Undocu Community Summit and in line with our organizational purpose, we propose to organize a Student-Focused Undocu Summit in Fall 2023. The goals of this summit for students in 7th grade through college are:

Raise awareness of and address issues facing undocumented student communities (including students in mixed status households) in San Luis Obispo City, San Luis Obispo County, and Northern Santa Barbara County.

Foreground and center the goals and visions of undocumented student community members in the design and implementation of this event via the student organizer program.

Celebrate undocujoy amongst undocumented student communities.

Create spaces for members of the Central Coast undocumented student communities to guide the work of individual and organizational allies and advocates in SLO City, SLO County, and Northern SB County.

Collectively develop a more robust and nuanced understanding of Central Coast undocumented student communities, including those students in San Luis Obispo City.

Highlight the leadership role of SLO City in taking action to meet the needs and support the dreams of undocumented student communities

#### Costs/Participants

\$23,200 total to support: 10 stipends of \$600 for undocu/mixed status students to participate in the design and planning of this event (at least 2 of whom will be from SLO City); speaker fees; keynote transportation; food; advertising; material translation; printing and promotion; and simultaneous interpretation. We project that at least 50 undocu/mixed status students will participate (at least 20 from SLO City) and at least 100 allies and advocates (at least 50 from SLO City).

#### Direct Aid to Undocumented Students and Students in Mixed Status Families

During the grant period, we propose to continue to offer direct aid. We plan to offer financial assistance for undocumented students and students from mixed status families attending a K-12 school, community college, or a CSU in San Luis Obispo and Northern Santa Barbara Counties. Financial assistance is also available for students from San Luis Obispo and Northern Santa Barbara Counties who have graduated from an area school and who are currently enrolled in an institution of higher education. Financial assistance awards are typically \$500 or less. We are requesting \$15,000 from SLO City and CCC-USS pledges to fundraise an additional matching \$15,000 for this activity.

As funds are available, CCC-USS supports:

As funds are available, CCC-USS supports:

DACA application/renewal fees

Stipends for adjustment of status

Funding to participate in educational & professional development opportunities

Emergency financial assistance, including financial hardship resulting from COVID-19 (e.g., rental and utility payments, transportation, groceries, child care, health, educational challenges, etc.).

Costs/Participants:

60 financial assistance awards at \$500/person (30 funded by SLO City; at least 20 of these 30 awards funded by SLO City will be to City residents)

Fiscal Sponsor Fee - 8% of award

### **Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

The proposed project will primarily serve the undocumented, formerly undocumented, and mixed status student communities in SLO City, SLO County, and Northern Santa Barbara County. The project will also serve individual and organizational allies and advocates, including individuals and organizations located in SLO City. Our proposed programs also acknowledges and will support undocumented, formerly undocumented, and mixed status student communities who work within the City of San Luis Obispo and commute from neighboring cities, given the high cost of housing within the city limits and long waitlists for subsidized housing (of which many undocumented people do not qualify because of their status).

### **Describe the equity gaps and community needs this project will address.**

Our proposed project aligns with the RFP's focus on equity gaps in education and community representation. As noted above, it is estimated that only 10% of eligible undocumented students pursue higher education post high school graduation and that a smaller number of these enrolled students graduate. This project addresses these opportunity and support gaps. In addition, specifically within SLO City and SLO County and related to gaps in community representations, undocu organizations are disproportionately led by individuals who have not experienced undocumentedation. Through both our proposed Undocu and Student Steering Committee Participation Stipends, Strategic Visioning/Planning process, and support for undocu student organizers of the Undocu Student Summit, we aim to transform our organization so that it is both led by undocu community members and sustainable long-term.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

#### **Methods of Evaluation**

Example : # of BIFOC serving on public boards, committees

Undocu & Student Community Member Steering Committee Participation Stipends # of undocumented or formerly undocumented people serving on the steering committee # of students serving on the steering committee

Example : # of BIFOC serving on public boards, committees

Strategic Visioning/Planning CCC-USS should be led by the communities it serves and sustainable in the long-term

#### **Indicators of Success / Measurable Outcomes**

Example: 10% increase by end of 2021

At least 30% of the steering committee should be composed of individuals who are currently or formerly undocumented or in a mixed status family by the end of this grant period At least 30% of the steering committee should be composed of students by the end of this grant period

Example: 10% increase by end of 2021

CCC-USS will develop a strategic vision and plan for the next 5-10 years that includes a section on a focus on SLO City and recommendations for SLO City Government by the end of this grant period

Example : # of BIFOC serving on public boards, committees

Student-Focused Undocu Summit # of undocumented, formerly undocumented, and mixed status student organizers # of participants total # of undocu participants # of ally & advocate participants

Example : # of BIFOC serving on public boards, committees

Direct Aid to Undocumented Students and Students in Mixed Status Families # of financial assistance awards made

Example: 10% increase by end of 2021

All 10 student organizers will be undocumented, formerly undocumented, and/or from mixed status families (at least 2 of whom will be from SLO City) At least 50 undocu students will participate in the summit (at least 20 of whom will be from SLO City) At least 100 advocates and allies will participate in the summit (at least 50 of whom will be from SLO City) Summit student organizers will be enabled to be effective and visionary. Summit participants will gain access to new knowledge, resources, and networks

Example: 10% increase by end of 2021

Via funding provided by SLO City, we will provide 30 financial awards (at least 20 of whom will be from SLO City); via alternative funding, CCC-USS will provide at least 30 additional awards

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

#### Name of Partner

Example: ABC Business

Cal Poly Dream Center/Cal Poly

Example: ABC Business

Cuesta College Monarch Dream Center

Example: ABC Business

Allan Hancock College Aim to Dream Center

Example: ABC Business

Local School District ELACs (English Learner Advisory Committees)

Example: ABC Business

Local Migrant Education Programs

Example: ABC Business

Laguna Middle School

#### Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes

Outreach to student populations; free space; tbd

Example: Free Use of Space for Weekend Classes

Outreach to student populations; tbd

Example: Free Use of Space for Weekend Classes

Outreach to student populations; tbd

Example: Free Use of Space for Weekend Classes

Outreach to student populations; tbd

Example: Free Use of Space for Weekend Classes

Outreach to student populations; tbd

Example: Free Use of Space for Weekend Classes

Free Space for Student-Focused Undocu Summit planning and implementation

#### Provide the timeline for this proposed project.

We will operate with the 4 components of the proposed project simultaneously - 1) Undocu & Student Community Member Steering Committee Participation Stipends to transform who is steering the organization (members to be finalized by Feb 15, 2023); 2) Strategic Visioning/Planning with the Steering Committee, including the 4 newly recruited members (including selection of the external consultant, the strategic visioning/planning process, and stakeholder input to produce a finalized strategic vision and plan by Sept 2023 ; and 3) recruitment of undocumented, formerly undocumented, and mixed status students to lead the visioning and implementation of the Student Undocu Summit (recruitment to occur in Winter/Spring 2023; organizer development sessions designed to meet student-identified training needs to occur in Spring/Summer 2023; planning for the Student-focused Undocu Summit to occur simultaneously in Spring/Summer 2023 with finalization in Fall 2023; and the planned Summit in mid-to-late Oct or early Nov 2023, followed by summative evaluation). The 4th strand of the project - Direct Aid to undocumented students and students in mixed status families - will be initiated in January 2023, including fundraising of the additional \$15,000 to expand the direct aid pool to \$30,000. The proposed project will end in December 2023, with a final report to the City.

#### Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

The proposed steering committee member recruitment and strategic visioning/planning process is specifically designed to ensure sustainability of the organization and proposed projects and to transform the organization so that it is undocu community led. With the proof of concept for the student organization of the Student-focused Undocu Summit, we plan to seek external funding to continue implementation in future years. Regarding the Direct Aid component of the project, we aim to move towards greater sustainability of this part of the project via securing more monthly donors, increasing the number of larger donations, and continuing to partner with organizations like SLO County UndocuSupport.

### PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

	Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1	Undocu & Student Community Member Steering Committee Participation Stipends (4 stipends of \$600 for new steering committee member participation for new undocu & student community members)	\$ 2,400.00	\$ 2,400.00	\$ 0.00
2	Strategic Visioning/Planning: Consultant	\$ 5,000.00	\$ 5,000.00	\$ 0.00
3	Strategic Visioning/Planning: Simultaneous Interpreting	\$ 1,000.00	\$ 1,000.00	\$ 0.00
4	Strategic Visioning/Planning: Material translation	\$ 600.00	\$ 600.00	\$ 0.00
5	Student-Focused Undocu Summit (10 stipends of \$600 for undocu students to participate in the design and planning of this event)	\$ 6,000.00	\$ 6,000.00	\$ 0.00
6	Student-Focused Undocu Summit (speaker fees)	\$ 5,000.00	\$ 5,000.00	\$ 0.00
7	Student-Focused Undocu Summit (keynote transportation)	\$ 1,500.00	\$ 1,500.00	\$ 0.00
8	Student-Focused Undocu Summit (food)	\$ 2,500.00	\$ 2,500.00	\$ 0.00
9	Student-Focused Undocu Summit (advertising/promotion)	\$ 2,500.00	\$ 2,500.00	\$ 0.00
10	Student-Focused Undocu Summit (material translation/travel)	\$ 1,500.00	\$ 1,500.00	\$ 0.00
11	Student-Focused Undocu Summit (printing)	\$ 2,000.00	\$ 2,000.00	\$ 0.00
12	Student-Focused Undocu Summit (Simultaneous Interpreting)	\$ 1,500.00	\$ 1,500.00	\$ 0.00

<b>13</b>	Student-Focused Undocu Summit (space rental- in kind)	\$ 0.00	\$ 0.00	\$ 0.00
<b>14</b>	Direct Aid to Undocumented Students and Students in Mixed Status Families (60 financial assistance awards at \$500/person)	\$ 30,000.00	\$ 15,000.00	\$ 15,000.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY



### Describe the plan for promoting this project within the City of San Luis Obispo.

We will actively recruit new steering committee members from the City of San Luis Obispo (via our newsletter, direct outreach - including to City-based DLAC/ELAC, any opportunities to advertise provided by the City).

We will actively recruit student organizers for the Undocu Student Summit from SLO City, targeting City middle schools, high schools, and colleges (via our newsletter, direct outreach, any opportunities to advertise provided by the City).

We will promote the project via advertising within the City, including via City-based mechanisms, Ecologistics (our fiscal sponsor) and other CCC-USS partner organizations.

We will produce and circulate multilingual print and digital promotional materials

### How will you highlight the City's support of your project?

The City's support of the project will appear in all promotional materials and lists of sponsors. The City will be invited to showcase its diversity, equity, and inclusion efforts via a table at the Student-focused Undocu Summit.

## PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Adrienne Garcia-Specht

### Signature \*

### Title: \*

Steering Committee Member

### Date: \*

8/31/2022





August 30, 2022

Diversity, Equity and Inclusion Task Force  
City of San Luis Obispo

Dear Task Force Members:

Ecologistics, Inc. is a California non-profit 501(c)(3) corporation, formed in 2010, whose mission is to create a resilient and healthy community for the residents of the California Central Coast that is environmentally and economically sustainable.

As part of our Incubating Activism program, we offer fiscal sponsorship to a number of nonprofit organizations in San Luis Obispo County who are focused on environmental and social justice issues. We are proud to have been chosen as the fiscal sponsor for Central Coast Coalition for Undocumented Student Success (CCC-USS) in May 2018. Under our fiscal sponsorship Ecologistics has established a restricted fund designated for CCC-USS through which Ecologistics receives grants, contributions and gifts and makes those funds available to the CCC-USS for the purposes of their mission. Through its good work in the community, CCC-USS meets Ecologistics' goal of addressing social justice issues by ensuring educational equity for all students and helping build capacity to support undocumented students in the region. We believe the grant money they are requesting for their Undocu Community Summit will definitely meet the City's intended purpose of advancing diversity, equity and inclusion within the City of San Luis Obispo.

Attached is Ecologistics' IRS determination letter. Thank you for your consideration.

Sincerely,

A handwritten signature in black ink that reads "Stacey Hunt".

Stacey Hunt, CEO

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **MAY 21 2010**

ECOLOGISTICS INC  
4349 OLD SANTA FE RD 5  
SAN LUIS OBISPO, CA 93401

Employer Identification Number:  
27-2116150  
DLN:  
17053106316000  
Contact Person:  
RENEE RAILEY NORTON ID# 31172  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
December 31  
Public Charity Status:  
509(a)(2)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
February 16, 2010  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.



ECOLOGISTICS INC

Sincerely,

A handwritten signature in black ink, appearing to read "Robert Choi". The signature is stylized with a large, sweeping initial "R" and a cursive "C".

Robert Choi  
Director, Exempt Organizations  
Rulings and Agreements

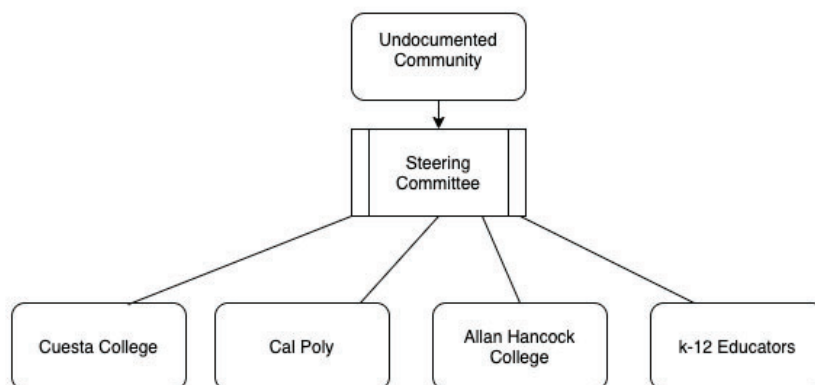
Enclosure: Publication 4221-PC



## **CENTRAL COAST COALITION for UNDOCUMENTED STUDENT SUCCESS**

### **Community Acknowledgement**

- The undocumented community serves as our north star as we stand up against anti-immigrant and oppressive ideologies, institutional practices, and everyday actions that threaten undocumented and mixed status students.
- And as such, we strive to practice radical social justice by cultivating transformative relationships within and between frontline organizations, educators, donors, and allies.
- Together we co-create a shared vision, tools, expertise, and heart to bring educational equity, self-determination and autonomy for the community.



**COALICIÓN PARA EL ÉXITO DE  
ESTUDIANTES INDOCUMENTADOS  
DE LA COSTA CENTRAL**

EXHIBIT B

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**Certificate Of Completion**

Envelope Id: 3C6F800050DB4565BA390D0403ADAA0A

Status: Completed

Subject: Complete with DocuSign: Final CCC-USS Completed Application Agreement (DEI Grant 22-23).pdf

Department:

Supplier:

Source Envelope:

Document Pages: 17

Signatures: 3

Envelope Originator:

Certificate Pages: 5

Initials: 0

Daniel Clancy

AutoNav: Enabled

990 Palm Street

Enveloped Stamping: Enabled

San Luis Obispo, CA 93422

Time Zone: (UTC-08:00) Pacific Time (US &amp; Canada)

dclancy@slocity.org

IP Address: 141.126.98.25

**Record Tracking**

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Holder: Daniel Clancy

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11/18/2022 8:41:41 AM

dclancy@slocity.org

**Signer Events**

Adrienne Garcia-Specht

ccc.undocu@gmail.com

Security Level: Email, Account Authentication  
(None)**Signature**

DocuSigned by:



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Signature Adoption: Pre-selected Style

Using IP Address: 66.214.75.218

**Timestamp**

Sent: 11/18/2022 8:44:18 AM

Viewed: 11/18/2022 9:11:00 AM

Signed: 11/22/2022 6:29:39 PM

**Electronic Record and Signature Disclosure:**

Accepted: 11/18/2022 9:11:00 AM

ID: 6687fe90-05df-4e48-b93f-1a4ce5e54596

Mark Amberg for Christine Dietrick

mamberg@slocity.org

Assistant City Attorney

Security Level: Email, Account Authentication  
(None)

DocuSigned by:



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Signature Adoption: Pre-selected Style

Using IP Address: 104.129.198.252

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Viewed: 11/28/2022 4:45:15 PM

Signed: 11/28/2022 4:45:30 PM

**Electronic Record and Signature Disclosure:**

Accepted: 11/28/2022 4:45:15 PM

ID: 78685536-06f5-42c8-80cf-b8a4b55b0ed5


Greg Hermann

ghermann@slocity.org

Deputy City Manager

Security Level: Email, Account Authentication  
(None)

DocuSigned by:



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Signature Adoption: Pre-selected Style

Using IP Address: 104.129.202.83

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Signed: 12/5/2022 1:52:34 PM

**Electronic Record and Signature Disclosure:**

Accepted: 12/5/2022 1:52:16 PM

ID: 45d6c462-ce69-4348-b330-1a9b689cb94b

**In Person Signer Events****Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp**

Certified Delivery Events	Status	Timestamp
<b>Carbon Copy Events</b>	<b>Status</b>	<b>Timestamp</b>
Matt Melendrez mmelendr@slocity.org Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 12/14/2022 6:19:31 PM ID: 02a0a1c7-8b1f-4f3e-a5f6-f78190bef4bc	COPIED	Sent: 12/5/2022 1:52:36 PM Viewed: 1/12/2023 3:05:20 PM
Adrienne Garcia-Specht ccc.undocu@gmail.com Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 11/18/2022 9:11:00 AM ID: 6687fe90-05df-4e48-b93f-1a4ce5e54596	COPIED	Sent: 12/5/2022 1:52:37 PM
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
<b>Envelope Summary Events</b>	<b>Status</b>	<b>Timestamps</b>
Envelope Sent	Hashed/Encrypted	11/18/2022 8:44:18 AM
Certified Delivered	Security Checked	12/5/2022 1:52:16 PM
Signing Complete	Security Checked	12/5/2022 1:52:34 PM
Completed	Security Checked	12/5/2022 1:52:37 PM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		

## **ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

From time to time, Carahsoft OBO City of San Luis Obispo (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through your DocuSign, Inc. (DocuSign) Express user account. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

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### **Withdrawing your consent**

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

### **Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of your DocuSign account. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use your DocuSign Express user account to receive required notices and consents electronically from us or to sign electronically documents from us.

### **All notices and disclosures will be sent to you electronically**

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through your DocuSign user account all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

**How to contact Carahsoft OBO City of San Luis Obispo:**

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: [keriksso@slocity.org](mailto:keriksso@slocity.org)

**To advise Carahsoft OBO City of San Luis Obispo of your new e-mail address**

To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address..

In addition, you must notify DocuSign, Inc to arrange for your new email address to be reflected in your DocuSign account by following the process for changing e-mail in DocuSign.

**To request paper copies from Carahsoft OBO City of San Luis Obispo**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.

**To withdraw your consent with Carahsoft OBO City of San Luis Obispo**

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your DocuSign account, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail, full name, IS Postal Address, telephone number, and account number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

**Required hardware and software**

Operating Systems:	Windows2000? or WindowsXP?
Browsers (for SENDERS):	Internet Explorer 6.0? or above
Browsers (for SIGNERS):	Internet Explorer 6.0?, Mozilla FireFox 1.0, NetScape 7.2 (or above)
Email:	Access to a valid email account
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	<ul style="list-style-type: none"><li>•Allow per session cookies</li><li>•Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection</li></ul>

\*\* These minimum requirements are subject to change. If these requirements change, we will provide you with an email message at the email address we have on file for you at that time providing you with the revised hardware and software requirements, at which time you will have the right to withdraw your consent.



**Acknowledging your access and consent to receive materials electronically**

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

By checking the 'I Agree' box, I confirm that:

- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Carahsoft OBO City of San Luis Obispo as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by Carahsoft OBO City of San Luis Obispo during the course of my relationship with you.

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/1/2022 | 3:54 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and SLO County UndocuSupport (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to SLO County UndocuSupport Partnership and Direct Aid with Local Immigrant Families as submitted in its application to the CITY on August 31 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$16,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

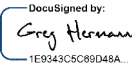
SLO County Undocusupport  
c/o The Community Foundation of San Luis Obispo County  
550 Dana Street  
San Luis Obispo, CA 93401  
undocusupport@cfsloco.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
D4399435C04B44B...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E9343C5C89D48A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
46690B18C87B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

## 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

### PART 1: APPLICANT INFORMATION



**Organization Name: \***

SLO County UndocuSupport

**Year Established: \***

2020

**Fiscal Agent, if different than above: \***

The Community Foundation San Luis Obispo County

**Tax ID #: \***

770496500

**Document Certifying Federal Tax-Exempt status, if applicable**

Nonprofit IRS Docs - The Community Foundation San Luis Obispo County.pdf 505.11KB

**Name of Executive Director (or highest leadership position)**

Chelsea Ruiz - UndocuSupport Program Manager

**Approximate Annual Budget:**

156,000

**Major Sources of Funding:**

Local donors, California Immigrant Resilience Fund, SLO County Board of Supervisors, Community Foundation San Luis Obispo County, SLO County Public Health

**Mission Statement:**

SLO County UndocuSupport's mission is to provide and connect resources, support and advocacy for and with immigrant families in SLO County in order to make meaningful impact and true system change. UndocuSupport strives to meet the basic needs of immigrant families to allow them to be healthy and thrive in the challenging environment of disproportionate impacts of COVID-19 and beyond, layered over years of systemic racism. UndocuSupport seeks to improve access to basic health and social services, and provide support to allow families to work, go to school and care for children.

**Number of paid staff (full- or part-time):**

1

**Number of volunteers:**

20

**Name of Board President or Chair:**

Rita Casaverde

**Organizational Leadership Chart \***

Org chart - UndocuSupport.png

2.91MB

**Name of Person completing this Application:**

Joel Diringer

**Organization Mailing Address: \***

Street Address

c/o The Community Foundation San Luis Obispo County

Address Line 2

550 Dana Street

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93401

Country

USA

**Phone: \***

8055432323

**E-mail: \***

undocusupport@cfsloco.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

UndocuSupport was created as a crisis response to the COVID-19 pandemic, when it became obvious that federal stimulus would be neglecting to provide a safety net for our undocumented- and mixed-status family community members. In an ideal world, every single person in our community would have access to basic services and programs regardless of their immigration status, but that is currently not the case. Legal and socially institutionalized stigma have been pushing some of our neighbors into the shadows, stifling their possibility to thrive and denying a sense of belonging to generations and generations of immigrant families in our community.

The need to work for systemic change has been prioritized in UndocuSupport's strategic planning, as well as meeting critical needs with immediate aid, streamlining access and delivery of services, and fiscal and operational sustainability of the organization.

Even though we have passed the peak of the COVID-19 crisis, our organization is highly aware that our undocumented and mixed-status families have always lived in a state of crisis, and this will not change once the pandemic is over. For this reason, this proposal focuses on requesting funds for our DIRECT AID PROGRAM, and support for our NEIGHBORHOOD CONVENINGS, which to this date have helped inform how we prioritize our efforts.

SLO County UndocuSupport grants funds to local nonprofit organizations to provide direct assistance to immigrant families, including those with undocumented members, to overcome their exclusion from public relief programs including stimulus payments, unemployment, food and rental assistance.

Funds of up to \$500 are provided to pay for rent, utilities, children's needs, and transportation. While rental assistance remains the biggest need, other needs include help for utilities, food, clothing, transportation (car payments and insurance), medical expenses, childcare costs, medical equipment such as oxygen tanks, dental treatment, and other items such as immigration fees, funeral costs, furniture, and diapers.

SLO County UndocuSupport is led by a Leadership Council with an Executive Committee, Fundraising Committee, Fiscal Committee and Grants Committee. The Grants Committee distributes funds in an open, competitive process to SLO County nonprofits that provide direct aid to undocumented families. The grants committee is independent and its members cannot be current or potential recipients of funds.

UndocuSupport is fiscally sponsored by The Community Foundation San Luis Obispo County which hosts hired staff and provides administrative support.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

SLO County UndocuSupport serves the immigrant population throughout San Luis Obispo County. The Latinx population numbers 63,000 (22.5%) in County. The immigrant population comprise approximately 10% of the County or nearly 30,000 persons.

There are an estimated 9,000 undocumented persons in San Luis Obispo County (Public Policy Institute of California) and at least 17,000 residents in families with an undocumented member (USC Immigrant Data Portal). The entire family is often excluded from, or very reluctant to apply for benefits due to the undocumented status of one family member. A growing, but as yet unknown, number of immigrant families are of indigenous origin from southern Mexico, Guatemala and Central America.

Low-income families with disproportionate financial challenges in supporting themselves due to the high, and increasing, costs of housing, food, childcare and transportation, often need to take on risks that other, more affluent families, can avoid. Going to work is essential to survival when sick leave, unemployment, stimulus payments and other support are not available. The aid that UndocuSupport provides helps families overcome the negative economic impacts of COVID-19 by providing them with funds to meet immediate needs that may result in eviction, loss of employment, hunger and ill-health.

In 2020, SLO County UndocuSupport raised over \$110,000 from over 200 local donations and attracted statewide philanthropic funding of \$213,000 from the California Immigrant Resilience Fund (GCIR) to provide essential support to 606 local immigrant families (with 2100 family members) in 17 communities in SLO County from Shandon to Nipomo.

In May 2021, we provided grants totaling \$140,000 to 6 immigrant serving organizations in SLO County to directly help immigrant families. Through November 2021, the UndocuSupport partners assisted 171 families (290 children, 291 adults) with aid of an average \$430 per family. Of those aided by SLO County UndocuSupport, 35 WERE IN THE CITY OF SAN LUIS OBISPO.

## PART 2: PROJECT INFORMATION



### Name of DE&I Project \*

SLO County UndocuSupport Partnership and Direct Aid with Local Immigrant Families

### Est. number of people served through this project: \*

600

### Est. number of SLO CITY RESIDENTS served through this project \*

150

### Total Project Cost: \*

110,880

### AMOUNT OF CITY FUNDING REQUESTED: \*

20,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

SLO County UndocuSupport is requesting SLO City DEI funds to expand within the City of Luis Obispo two key elements of its work to build support for and with immigrant community members who face inequitable access to resources. First, we plan to extend to San Luis Obispo an ongoing series of NEIGHBORHOOD CONVENINGS with immigrant families across the county, with the ultimate goal to invite deeper participation by immigrant community members in the long-term development of UndocuSupport as an organization. Second, we seek to grow our basic aid program which provides direct assistance to immigrant families, including those with undocumented members, to overcome their exclusion from COVID-19 and other public relief programs including stimulus payments, unemployment, food and rental assistance.

UndocuSupport informs its work in collaboration with local organizations (Central Coast Coalition for Undocumented Student Success, Promotores Collaborative, MICOP) by connecting directly with immigrant community members through NEIGHBORHOOD CONVENINGS throughout the county. The objectives of these convenings are to 1) create a community led approach to integrate organizational data and community knowledge to form a more holistic understanding of the range of undocumented experiences in our community, as well as specific barriers that San Luis Obispo and Northern Santa Barbara communities, 2) Ensure cultural relevance of organizational practices and communication, and 3) to develop trust and sharing of/for agency, organizations' resources.

To date, convenings have been held in Mixteco in San Miguel and Paso Robles, and in Spanish in Paso Robles, Cambria and Oceano and are planned for Los Osos/Morro Bay in the coming months. Several convenings in English have been held in English with DACA students at Cuesta and Cal Poly. SLO DEI grant funds will help support the launch of additional neighborhood convenings with Spanish-speaking families in San Luis Obispo. Additional potential partners in this work include Pacheco Elementary School ELAC and PTA.

Through UndocuSupport's DIRECT AID WORK, local non-profit organizations which provide support to the local immigrant population are invited to submit grant applications to the SLO UndocuSupport Grants Committee for review. In 2021, six local organizations applied for and received \$140,000 in funding for distribution directly to families in need. Our nonprofit partners worked with families on their immediate needs in the areas of housing, childcare, health care, nutrition and transportation and connected them to other services in the community.

With additional funds from this City DEI grant and others, UndocuSupport will expand its ability to provide assistance to local immigrant families living in and/or working in the City of San Luis Obispo. These funds will be issued using UndocuSupport's established process: the grants committee will issue a call for proposals from local organizations that serve immigrant families. The proposals will be reviewed by the grants committee, and recommendations will be forwarded to the UndocuSupport Leadership Council and the Community Foundation for distribution. Grantees will convene on a regular basis to share experiences and resource information.

#### **Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

SLO County UndocuSupport serves the immigrant population throughout San Luis Obispo County. The Latinx population numbers approximately 65,000 (23%) in the County. The immigrant population comprises approximately 10% of the County or nearly 30,000 persons. In the City of SLO, 17% of the population speaks a language other than English at home; and 18% of the population identifies as Latinx; 9% of the population are immigrants.

There are an estimated 9,000 undocumented persons in San Luis Obispo County (Public Policy Institute of California) and at least 17,000 residents in families with an undocumented member (USC Immigrant Data Portal). A growing, but as yet unknown, number of immigrant families are of indigenous origin from southern Mexico, Guatemala and Central America.

Direct aid funds are provided through UndocuSupport's nonprofit partners. To date, UndocuSupport funds have been distributed to local families by the following agencies: CAPSLO, Central Coast Coalition for Undocumented Students Success (CCC-USS), Center for Family Strengthening (Promotores Collaborative), Catholic Charities and Five Cities Homeless Coalition. This DEI grant will afford additional opportunities to build partnerships and extend our reach, both through neighborhood convenings with local families, and through direct aid partnerships with local agencies.

#### **Describe the equity gaps and community needs this project will address.**

Grantees and neighborhood convening participants to date have described UndocuSupport as the “safety net of safety nets” during times of financial stress, providing streamlined support when barriers (legal, bureaucratic, etc.) are too great through other channels.

Low-income families with disproportionate financial challenges in supporting themselves due to the high, and increasing, costs of housing, food, childcare and transportation, often need to take on risks that other, more affluent families, can avoid. Going to work is essential to survival when sick leave, unemployment, stimulus payments and other support are not available. The entire family is often excluded from, or very reluctant to apply for, benefits due to the undocumented status of one family member. This issue dramatically widens the equity gap between undocumented and documented members of our community. The community convenings help UndocuSupport identify the most pressing needs families experience, and provide stakeholder-driven guidance on how best UndocuSupport can help families navigate financial challenges by providing them with funds to meet immediate needs that may result in eviction, loss of employment, hunger and ill-health.

The Latinx population of the county has experienced COVID-19 cases at twice the rate of other population groups (see Figure 1, below). Latinx households in San Luis Obispo County have a per capita income of less than half that of white, non-Latinx households, \$22,580 versus \$43,259 (US Census 2019 ACS). While 20.8% of the overall county population is obese, 38.2% of Latinx residents are obese (CHIS COVID-19 Dashboard), a significant risk factor for diabetes, heart disease, and COVID-19 complications. And statewide, 25% of low-income immigrants have avoided accessing public benefits, over half in the last two years due to public charge rule changes under the prior administration (UCLA CHIS 2019). Immigrant and Latinx families will continue to suffer from the economic and social consequences of COVID into the future. The long term illnesses and deaths from COVID have stressed families. The economic burdens from the pandemic will be felt longer for the low- income families that had no “safety net” or “nest egg” to rely on. Inflation in housing costs, transportation, child care and food will make it even harder for immigrant families to recover from COVID.

In addition to the direct aid to families, UndocuSupport has been conducting focus groups with CCC-USS directly with immigrant families to better understand their needs. We have acted as a convenor of immigrant serving organizations in the County to share resources and cross-pollinate ideas. We are also connecting with other regional immigrant advocacy organizations including the Mixteco Indigenous Community Organizing Project.

Stories from families accessing UndocuSupport funds through partnering agencies:

A) The family has five adults and three children (ages, 5, 4, and 1) in the household and are struggling financially – the mother is eight months pregnant and has been unemployed for over seven months due to her high-risk pregnancy. The father works in agriculture and due to recent weather conditions in the area, he went without a paycheck for two weeks. His unemployment insurance application is still pending. They are currently doubled up with family members, renting a single bedroom. COVID worsened their situation, setting them back financially due to child care responsibilities with school closures. The funding through CAPSLO was used to help cover their portion of the rent for one month.

B) A The high school student and her siblings are being raised only by her undocumented mother. The mother’s hours as a housecleaner have been reduced due to COVID making finances more difficult. Recently the mother had to make a payment towards the students DACA paperwork putting her behind on the money that she was setting aside for rent. Funding delivered through CCC-USS was able to help cover rent payments.

C) The mother has worked as a housekeeper at a local hotel and had her hours significantly reduced during COVID. While the father maintained employment, they fell behind on utilities in order to stay current with rent and continue to support their two children, one of whom is a first generation college student. Funding through 5CHC assisted with utility payments to catch the family up on bills. They were able to connect the family to additional resources for food, low-income utilities, and the CA COVID-19 Rent Relief Program. The family was able to assess their current income and expenses and create a realistic budget for the coming months.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
-----------------------	---



Example : # of BIFOC serving on public boards, committees  
# of immigrants participating in neighborhood  
convenings, advisory board

Example : # of BIFOC serving on public boards, committees  
# of families served with direct aid – broken down  
by (see below)...

Example : # of BIFOC serving on public boards, committees  
...# of adults, # of children

Example : # of BIFOC serving on public boards, committees  
...amount and type of aid

Example : # of BIFOC serving on public boards, committees  
# of families linked to resources, services

Example : # of BIFOC serving on public boards, committees

Example: 10% increase by end of 2021

8-10 convening participants contribute knowledge  
that helps update documentation of needs and  
resources specific to families living/working in San  
Luis Obispo; Representation by SLO-based  
immigrant community members in UndocuSupport  
leadership/ongoing development increased by at  
least 3 through participation in a regional  
UndocuSupport advisory board.

Example: 10% increase by end of 2021

35 families (~150 individuals) living in San Luis  
Obispo receive direct aid to address basic needs

Example: 10% increase by end of 2021

feedback logged through grantee agency reports

Example: 10% increase by end of 2021

feedback logged through grantee agency reports

Example: 10% increase by end of 2021

Decrease % of return rate over time

Example: 10% increase by end of 2021

In the chart below, identify any partnerships/collaborations that are supporting this  
project, and their roles.

#### Name of Partner

Example: ABC Business

Diversity Coalition of San Luis Obispo County,  
Central Coast Coalition for Undocumented Student  
Success, First 5 SLO County, Diringier and  
Associates, Promotores Collaborative/Center for  
Family Strengthening, Allies for Immigration  
Justice, CAPSLO, Quinn Brady

Example: ABC Business

Central Coast Coalition for Undocumented Student  
Success, Promotores Collaborative, MICOP, The  
Link, First 5 SLO County

Example: ABC Business

Promotores/Center for Family Strengthening,  
Central Coast Coalition for Undocumented Student  
Success, Catholic Charities, 5 Cities Homeless  
Coalition, Paso Robles Housing Authority,  
CAPSLO

Example: ABC Business

The Community Foundation San Luis Obispo  
County

Example: ABC Business

#### Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes

UndocuSupport Leadership Council

Example: Free Use of Space for Weekend Classes

Co-organizer of Neighborhood Convenings

Example: Free Use of Space for Weekend Classes

Distributor of Direct Aid

Example: Free Use of Space for Weekend Classes

UndocuSupport Fiscal Agent, UndocuSupport  
Fund Holder

Example: Free Use of Space for Weekend Classes

**Provide the timeline for this proposed project.**

Our DIRECT AID project started in 2020 with the founding of UndocuSupport, this grant would help us to continue providing immediate relief to families through our grantee agencies in the 2023 calendar year.

- Funds would be distributed after funding is available to UndocuSupport and following our distribution process outlined in Part 2 of this grant.

Our NEIGHBORHOOD CONVENINGS project has been in place since 2021. This additional funding would allow us to organize 2 neighborhood convenings in the City of SLO in the 2023 calendar year.

- Each neighborhood convening will be organized in a timely manner, according to and following recommendations by micro-local partners and members of the community.

**Describe your plan for sustainability beyond the City's one-year award funding, if applicable.**

Due to the fact that focused support for undocumented and mixed status families in SLO County was non-existent, UndocuSupport has been able to find multiple, diverse funding sources. We have been previously successful in raising funds both for direct aid and operations. We have applied to the Community Foundation for additional assistance in resource development and communications, and are working with other UndocuFunds in the state to find synergies and share lessons learned.

In record timing, UndocuSupport was able to hire its first full-time employee as of August 2022. This shift for a historically all-volunteer initiative offers a timely opportunity to build scale and deepen partnerships in the community. This time of growth creates new opportunities to expand community partnerships and create additional pathways to connect immigrant families with resources.

## PART 3: PROJECT COST / BUDGET

Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Direct Aid to Families	\$ 60,000.00	\$ 15,000.00	\$ 45,000.00
2 Neighborhood Convenings	\$ 6,000.00	\$ 1,000.00	\$ 5,000.00
3 Grantee agency family support staff admin and fiscal oversight (8%)	\$ 4,800.00	\$ 1,200.00	\$ 3,600.00
4 UndocuSupport staff to assist grant committee to issue RFP, select grantees, convene grantees and report on progress	\$ 30,000.00	\$ 1,000.00	\$ 29,000.00
5 Community Foundation San Luis Obispo County administrative costs (10%)	\$ 10,080.00	\$ 1,800.00	\$ 8,280.00
6 TOTAL	\$ 110,880.00	\$ 20,000.00	\$ 90,880.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY

**Describe the plan for promoting this project within the City of San Luis Obispo.**

The promotion of our programs will be through the organizations that are a part of our collective of partners and grantee agencies (20+), our website, email list and press releases. Additional outreach will be prioritized for local school English learner communities, ELACs, PTAs and SLCUSD.

Our informational materials will be available in Spanish and English and will be shared with partner agencies, local family resource centers and our Mixteco speaking partners to be shared in culturally sensitive ways.

**How will you highlight the City's support of your project?**

UndocuSupport will be sure to highlight SLO City's support of projects through a press release shared with the announcement of this grant to UndocuSupport partners, community and media and promoted by our Board of Directors. A picture with City of SLO officials would be featured on our website.

The City of SLO logo will be added to a sponsors/supporters/partners page in our website, as well as be included in all of our program materials that are public facing, when appropriate.

UndocuSupport will work with fiscal sponsor, the Community Foundation San Luis Obispo County, to identify additional ways to highlight the City of SLO's support.

City of SLO DEI Manager and SLO Human Relations Commission members will be invited to join quarterly UndocuSupport convenings of organizations and partners.

**PART 5: CERTIFICATION**



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person completing this Application: \***

Joel Diringier,

**Signature \***

A rectangular box containing a handwritten signature in black ink that reads "Joel Diringier".

**Title: \***

UndocuSupport Leadership Council Member and Executive Committee (Treasurer)

**Date: \***

8/31/2022

OCT 21 2016

**Internal Revenue Service**  
**P.O. Box 2508**  
**Cincinnati, OH 45201**

**Department of the Treasury**

**Date:** October 14, 2016

THE COMMUNITY FOUNDATION  
SAN LUIS OBISPO COUNTY  
HEIDI MCPHERSON  
550 DANA ST  
SAN LUIS OBISPO CA 93401

**Person to Contact:**

Ms. Herald  
ID #02-03115

**Toll-Free Telephone Number:**

877-829-5500

**Employer Identification Number:**

77-0496500

**Form 990 Required:**

Yes

Dear Sir or Madam:

This is in response to your request dated September 19, 2016, regarding your tax-exempt status.

We issued you a determination letter in April 1999, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

Our records also indicate you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If a return is required, you must file Form 990, 990-EZ, 990-N, or 990-PF by the 15th day of the fifth month after the end of your annual accounting period. IRC Section 6033(j) provides that, if you don't file a required annual information return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

For tax forms, instructions, and publications, visit [www.irs.gov](http://www.irs.gov) or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).

Sincerely yours,



Jeffrey I. Cooper  
Director, Exempt Organizations  
Rulings and Agreements



MAY 14 2003

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: MAY 11 2003

SAN LUIS OBISPO COUNTY COMMUNITY  
FOUNDATION  
PO BOX 1580  
SAN LUIS OBISPO, CA 93406-1580

Employer Identification Number:  
77-0496500

DLN:  
17053088721053

Contact Person:  
GARY L BOTKINS

ID# 31463

Contact Telephone Number:  
(877) 829-5500

Our Letter Dated:  
April 1999

Addendum Applies:  
No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Letter 1050 (DO/CG)

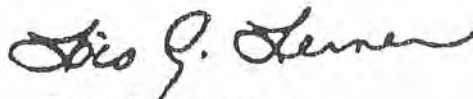
-2-

SAN LUIS OBISPO COUNTY COMMUNITY

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,

A handwritten signature in dark ink, appearing to read "Lois G. Lerner". The signature is fluid and cursive, with a large initial "L" and a stylized "G".

Lois G. Lerner  
Director, Exempt Organizations  
Rulings and Agreements

Letter 1050 (DO/CG)



INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: APR 21 1999

SAN LUIS OBISPO COUNTY COMMUNITY  
FOUNDATION INC  
C/O WARREN A SINSHEIMER  
1010 PEACH STREET  
SAN LUIS OBISPO, CA 93401

Employer Identification Number:  
77-0496500

DLN:

17053328038008

Contact Person:

PATRICE WHANG

ID# 95083

Contact Telephone Number:

(415) 522-6053

Accounting Period Ending:

December 31

Foundation Status Classification:

170(b)(1)(A)(vi)

Advance Ruling Period Begins:

May 8, 1998

Advance Ruling Period Ends:

December 31, 2002

Addendum Applies:

No

Dear Applicant:

Based on information you supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably expect to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, during an advance ruling period you will be treated as a publicly supported organization, and not as a private foundation. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must send us the information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, we will classify you as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, we will classify you as a private foundation for future periods. Also, if we classify you as a private foundation, we will treat you as a private foundation from your beginning date for purposes of section 507(d) and 4940.

Grantors and contributors may rely on our determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you send us the required information within the 90 days, grantors and contributors may continue to rely on the advance determination until we make a final determination of your foundation status.

Letter 1045 (DO/CG)

-2-

## SAN LUIS OBISPO COUNTY COMMUNITY

If we publish a notice in the Internal Revenue Bulletin stating that we will no longer treat you as a publicly supported organization, grantors and contributors may not rely on this determination after the date we publish the notice. In addition, if you lose your status as a publicly supported organization, and a grantor or contributor was responsible for, or was aware of, the act or failure to act, that resulted in your loss of such status, that person may not rely on this determination from the date of the act or failure to act. Also, if a grantor or contributor learned that we had given notice that you would be removed from classification as a publicly supported organization, then that person may not rely on this determination as of the date he or she acquired such knowledge.

If you change your sources of support, your purposes, character, or method of operation, please let us know so we can consider the effect of the change on your exempt status and foundation status. If you amend your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, let us know all changes in your name or address.

As of January 1, 1984, you are liable for social security taxes under the Federal Insurance Contributions Act on amounts of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the private foundation excise taxes under Chapter 42 of the Internal Revenue Code. However, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Internal Revenue Code. Bequests, legacies, devises, transfers, or gifts to you or for your 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.

Donors may deduct contributions to you only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, gives guidelines regarding when taxpayers may deduct payments for admission to, or other participation in, fundraising activities for charity.

Contributions to you are deductible by donors beginning May 8, 1998.

You are not required to file Form 990, Return of Organization Exempt From Income Tax, if your gross receipts each year are normally \$25,000 or less. If you receive a Form 990 package in the mail, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return. Because you will be treated as



-3-

## SAN LUIS OBISPO COUNTY COMMUNITY

a public charity for return filing purposes during your entire advance ruling period, you should file Form 990 for each year in your advance ruling period that you exceed the \$25,000 filing threshold even if your sources of support do not satisfy the public support test specified in the heading of this letter.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete. So, please be sure your return is complete before you file it.

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

You are required to make your annual return available for public inspection for three years after the return is due. You are also required to make available a copy of your exemption application, any supporting documents, and this exemption letter. Failure to make these documents available for public inspection may subject you to a penalty of \$20 per day for each day there is a failure to comply (up to a maximum of \$10,000 in the case of an annual return).

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, we will assign a number to you and advise you of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

In accordance with section 508(a) of the Code, the effective date of this determination letter is May 8, 1998.

This determination is based on evidence that your funds are dedicated to the purposes listed in section 501(c)(3) of the Code. To assure your continued exemption, you should keep records to show that funds are spent only for those purposes. If you distribute funds to other organizations, your records should show whether they are exempt under section 501(c)(3). In cases where the recipient organization is not exempt under section 501(c)(3), you must have evidence that the funds will remain dedicated to the required purposes and that the recipient will use the funds for those purposes.

Letter 1045 (DO/CG)

-4-

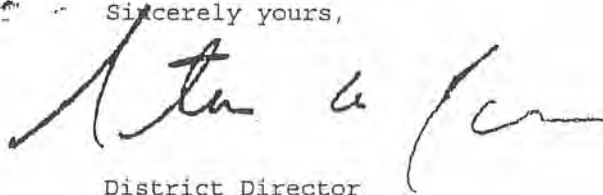
SAN LUIS OBISPO COUNTY COMMUNITY

If we said in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help us resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

A handwritten signature in dark ink, appearing to read "John A. [unclear]", is written over the typed name "District Director".

District Director

Enclosure(s) :  
Form 872-C



# SLO County UndocuSupport

**FISCAL  
SPONSOR:**

THE *Community*  
**FOUNDATION**  
SAN LUIS OBISPO COUNTY

## **COALITION**

Collective of social services, humanitarian, faith based, philanthropic, volunteer, local public sector leaders and advocacy organizations and individuals working with immigrant families.

### **LEADERSHIP COUNCIL**

**Executive Committee**

**Fundraising Committee**

**Grants Committee**

**Finance Committee**

**Program Manager**

Questions to: [undocusupport@cfsloco.org](mailto:undocusupport@cfsloco.org)

**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

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**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/5/2022 | 1:36 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Downtown SLO (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to the street activation and SNAP program as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$11,400, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.



7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager


GRANTEE:  
Downtown SLO  
Ali Bailey  
1035 Chorro Street  
San Luis Obispo, CA 93401  
ali@downtownslo.com

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
Ali Bailey, Events & Fundraising Specialist

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION



**Organization Name: \***

Downtown SLO

**Year Established: \***

2008

**Fiscal Agent, if different than above: \***

Friends of Downtown SLO

**Tax ID #: \***

823680300

**Document Certifying Federal Tax-Exempt status, if applicable**

501c3DeterminationLetterFriendsOfDowntown.pdf

60.87KB

**Name of Executive Director (or highest leadership position)**

Bettina Swigger

**Approximate Annual Budget:**

1,300,000

**Major Sources of Funding:**

Events, Retail Sales, Contract for services

**Mission Statement:**

Downtown SLO serves San Luis Obispo as the voice for downtown business and community. Founded in 1975 as an advisory body of the City and established in 2008 as a 501c6 nonprofit organization, our mission is to foster an economically vibrant downtown.

**Number of paid staff (full- or part-time):**

16

**Number of volunteers:**

376

**Name of Board President or Chair:**

Stephanie Stackhouse

**Organizational Leadership Chart \***

Org Chart (in progress).pdf

44.96KB

**Name of Person completing this Application:**

Ali Bailey



**Organization Mailing Address: \***

Street Address

1035 Chorro Street

Address Line 2

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93401

Country

USA

**Phone: \***

805-345-8349

**E-mail: \***

ali@downtownslo.com

**Briefly describe your organization’s mission, primary activities, and operating structures.**

Downtown SLO serves San Luis Obispo as the voice for Downtown business. Established as a 501(c)(6) nonprofit organization, our mission is to foster an economically vibrant Downtown. Our organization is made up of the fee-paying businesses within the predefined Business Improvement Area, voluntary members, and our civic collaborators, including nonprofit organizations, residents, and visitors to our Downtown. We have a robust partnership with the City of San Luis Obispo. We advocate on behalf of our membership as well as participate in City processes to ensure our Downtown is positioned as vital to our City, County, and regional economy and identity. From the famous Thursday Night Farmers' Market to the Annual Holiday Parade to Concerts in the Plaza, we're always preparing for the next big event in Downtown SLO!

Launched in 2018, Friends of Downtown SLO is a 501(c)(3) non-profit focusing on clean and safe efforts, including the Ambassador program, beautification and public art, urban forest protection, and homeless outreach.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

Downtown SLO supports our members. They consist of businesses located in the Business Improvement Area (BIA), as well as voluntary members. Our members are valuable and insightful community partners who advocate for an economically vibrant, exciting, inclusive, clean, and safe downtown San Luis Obispo. Our organization also serves the local residents and a substantial, growing tourist population. Among the residents, the demographic is split into three main groups: university students, families, and residents ages 65 and over in the San Luis Obispo area.

Race:

White: 82.63%

Two or more races: 5.49%

Asian: 5.13%

Other race: 4.05%

Black or African American: 2.26%

Native American: 0.42%

Native Hawaiian or Pacific Islander: 0.02%

Age

Under 5: 4.3%

Under 18: 17.5%

18-65: 57.2%

65+: 21%

**PART 2: PROJECT INFORMATION**



**Name of DE&I Project \***

Picture Yourself in SLO: 40 Years of DEI at the Downtown Farmers' Market

**Est. number of people served through this project: \***

40000

**Est. number of SLO CITY RESIDENTS served through this project \***

47,000

**Total Project Cost: \***

42,150

**AMOUNT OF CITY FUNDING REQUESTED: \***

30,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

2023 marks the 40th anniversary of the Downtown Farmers' Market in San Luis Obispo. Every Thursday night for four decades, Higuera is transformed into a space where everybody's welcome. Picture Yourself In SLO will celebrate the faces of the Farmers' Market through the years, highlighting the faces of the farmers, vendors, and guests who represent multitudinous ethnic, cultural, religious, and municipal identities. This project includes promotional efforts to produce 100 total banners to be designed, printed, and installed for a one-month period either the month of April, National Diversity Month, or in August in which National Farmers' Week occurs. In addition to these DEI faces of our market vendors, we will expand the Market for up to four special DEI-focused side-street activations, providing access, programming, our platform, services to marginalized groups and organizations, who may not have the resources to pay for this opportunity otherwise.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

Downtown SLO produces one of the few year round markets in the County. Open Thursday(s) from 6-9 p.m. in downtown San Luis Obispo on Higuera Street, the market is five blocks of over 100 vendors offering

Downtown SLO produces one of the few year-round night markets in the Country. Open every Thursday from 6-9 p.m. in downtown San Luis Obispo on Higuera Street, the market is five blocks of over 100 vendors offering fresh produce, famous BBQ, delicious meals, crafts, baked goods, entertainment, and MORE! The market attracts on average between 7,000-12,000 locals and visitors weekly. Our 40 years of faces at the Market program for 2023 is an opportunity for us to celebrate the diversity of our vendors, artisans and farmers who have been selling their goods to our community for forty years. For one dedicated month, we will activate 100+ banners in our downtown bringing attention to our multi-cultural and diverse market community. In addition, we can activate up to four side street activations that provide education, programs and services to our community during a busy market providing a space to highlight and celebrate marginalized community members like veterans, BIPOC, women, LGBTQ+, low-income and the mental health and disabled community.

**Describe the equity gaps and community needs this project will address.**

The community of San Luis Obispo is having necessary, challenging conversations about inclusion. Many of our institutions do not have representation for people of color. But if you walk on Higuera on Thursday night, you will see people of all backgrounds enjoying public space and creating community. The Market is one of the most diverse events/activities in the County, drawing a unique mix of vendors and attendees. We are excited to celebrate this milestone year by celebrating the diversity of our market in banner images and side-street education/community activations at the market. Through this program, we hope to showcase and represent the many faces of the Market, and by so doing, invite all people to picture themselves as part of our community. We aim to partner with other nonprofits to ensure their voices can be amplified.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

**Methods of Evaluation**

Example : # of BIPOC serving on public boards, committees

25 agency service booths at our Veterans activation

**Indicators of Success / Measurable Outcomes**

Example: 10% increase by end of 2021

We will reach over 1000 active duty, veteran's and their families with specialized education

Example : # of BIPOC serving on public boards, committees  
We will design, print and install 100+ DEI banners for a one month activation

Example : # of BIPOC serving on public boards, committees  
Cal Fresh EBT food stamp program promotion during Farmers' Market Week

Example: 10% increase by end of 2021  
Our banners will increase Market DEI awareness locally, county wide and among visitors

Example: 10% increase by end of 2021  
We will increase the number of recipients who use our EBT & Market Match program by 15%

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner

Example: ABC Business  
Veteran's Services Collaborative

Example: ABC Business  
Cal Fresh

Example: ABC Business  
The City of San Luis Obispo

Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes  
Coordination of service agency booths

Example: Free Use of Space for Weekend Classes  
Cal Fresh/SNAP/EBT at our market each week we will match up to \$10 in Market Match tokens. Market Match tokens are good for fruit and vegetable purchases.

Example: Free Use of Space for Weekend Classes  
Weekly deploying of barricades for Market road closure

Provide the timeline for this proposed project.

The program will begin in either April or August 2023. The date is dependent on our current banner program that's in place. This will be a one month program with the Picture Yourself in SLO program. Our side street activation piece of the program will happen up to four times. We have currently identified two of the four Markets in 2023: National Farmers' Market Week 8/3/2023 and Veteran's Day at the Market: 11/9/2023. We will look to partner with one to two other marginalized groups to help support programs that support DEI through a market activation that offers access, education and civic engagement. With this funding, we will be able to provide the additional resources during the market to support these activations with our staffing, promotion and logistical efforts.

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

While this program's launch is tied to the 40th Anniversary celebration of our Farmers' Market, it has the potential to continue beyond 2023 with the help of our growing efforts to secure corporate sponsorship. Our organization has hired a new Event & Fundraising Specialist team member who is developing a robust sponsorship program for the coming years.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Side Street Activations	\$ 4,800.00	\$ 2,400.00	\$ 2,400.00
2 Banners	\$ 22,000.00	\$ 15,000.00	\$ 7,000.00
3 Promotions	\$ 6,600.00	\$ 4,600.00	\$ 2,000.00
4 Staffing	\$ 8,750.00	\$ 6,000.00	\$ 2,750.00

\*During application review , you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY



### **Describe the plan for promoting this project within the City of San Luis Obispo.**

Downtown SLO has a strong Marketing & Communication Coordinator who utilizes a mix of promotional efforts to market our events and activities. This program will be highlighted on our website which has 21k visitors monthly. We will promote this with our weekly e-blast which has 4k subscribers. We utilize both our social media channels: Downtown SLO/Downtown SLO Farmers' Market handles to promote on Facebook & Instagram. IG has 13k and 7k followers respectively, and the FB pages both have around 12k followers. Additionally, we have an annual media contract with American General Media radio and weekly receive radio time for promotional purposes on 5-stations to promote special programs such as this.

### **How will you highlight the City's support of your project?**

In all of our projects we highlight and support all partners. We will list, name, mention the City's support of this 2023 program in all our marketing efforts listed above and utilize logo branding of the City as it pertains to the Picture Yourself in SLO program.

## PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### **Name of Person completing this Application: \***

Ali Bailey

### **Signature \***

### **Title: \***

Events & Fundraising Specialist

### **Date: \***

8/30/2022

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

**JUN 07 2018**

FRIENDS OF DOWNTOWN SLO INC  
C/O DOMINIC TARTAGLIA  
1108 GARDEN ST STE 210  
SAN LUIS OBISPO, CA 93401-3503

Employer Identification Number:  
82-3680300  
DLN:  
17053023334038  
Contact Person:  
RENEE RAILY NORTON ID# 31172  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b) (1) (A) (vi)  
Form 990/990-EZ/990-N Required:  
Yes  
Effective Date of Exemption:  
November 30, 2017  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

FRIENDS OF DOWNTOWN SLO INC

We sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

A handwritten signature in black ink that reads "Stephen A. Martin". The signature is written in a cursive style with a large, stylized 'S' at the beginning.

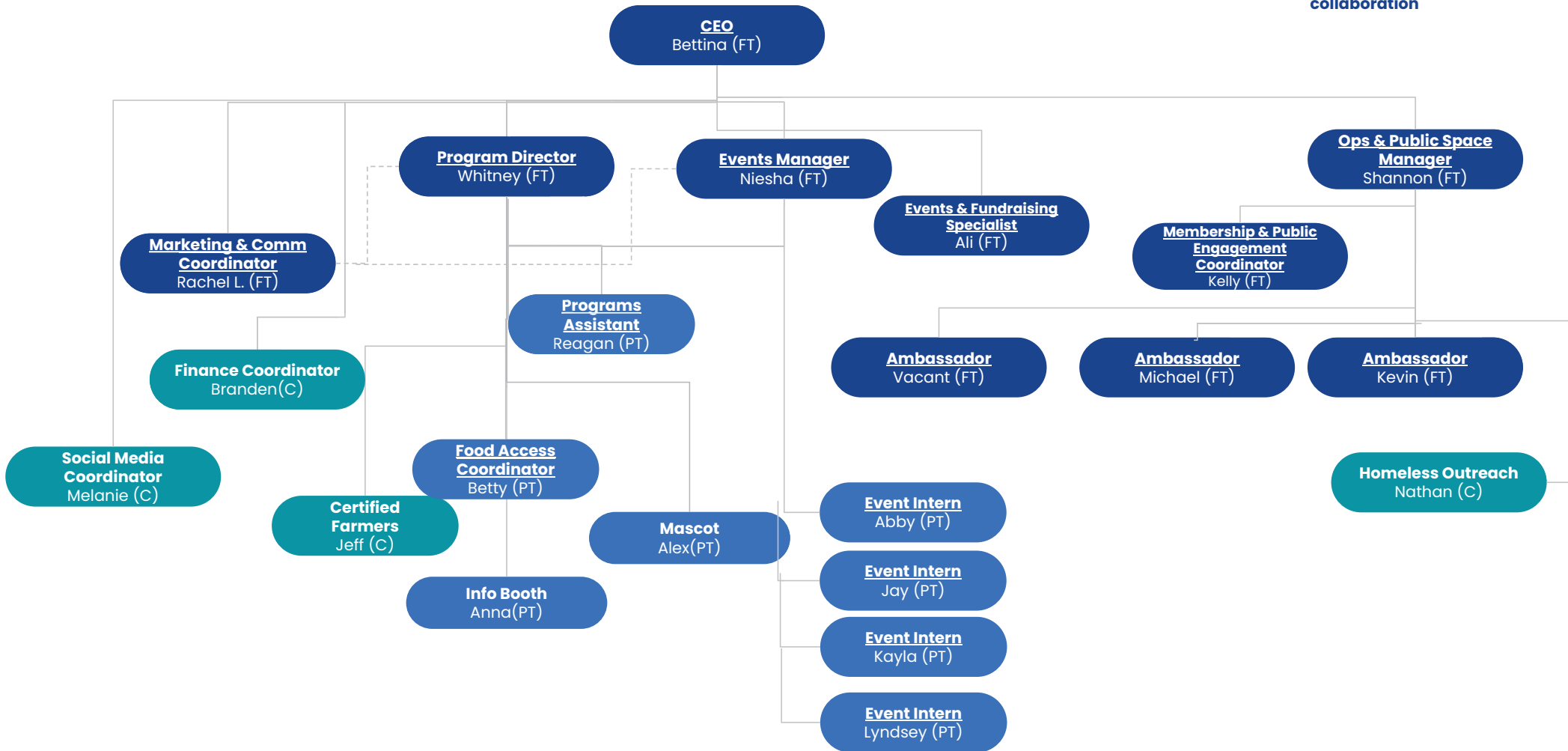
Director, Exempt Organizations  
Rulings and Agreements

# Downtown SLO Org Chart

Effective June 2022

## Legend

- direct report
- - - cross-functional collaboration



# Email List

Name	Email Address	Phone Number	Cell Phone	Reports To:
Bettina Swigger	bettina@downtownslo.com	(805) 234-9677	(719) 322-6438	Board of Directors/Executive Committee
Shannon DalPorto	shannon@downtownslo.com	(805) 234-9674	(949) 500-4568	CEO
Whitney Chaney	whitney@downtownslo.com	(805) 234-9676	(805) 459-2670	CEO
Niesha Johnston	niesha@downtownslo.com	(805) 234-9673	(805) 709- 2484	CEO
Ali Bailey	ali@downtownslo.com	(805) 234-9673	(805) 345-8349	CEO
Rachel Lackmann	marketing@downtownslo.com	N/A	(714) 356-0338	CEO
Kelly MacKinnon	kelly@downtownslo.com		(661) 803-0207	Operations/Public Space Manager
Kevin Casbeer	ambassador@downtownslo.com	(805) 250- 6467		Operations/Public Space Manager
Michael Hunt	ambassador@downtownslo.com	(805) 250- 6467	(805) 391-9800	Operations/Public Space Manager
Reagan Ryder Smith	reagan@downtownslo.com	N/A	(480) 620-8522	Program Director
Marrie Brown	marrie@downtownslo.com	N/A		CEO
Betty	N/A	N/A		Program Director
Anna Mullen	N/A	N/A	(805) 540-4766	Program Director



Exhibit B

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

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\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated \_\_\_\_\_ for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Hospice of SLO County (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to the training for volunteers and Latinx outreach as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$6,795, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

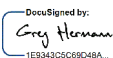
GRANTEE:  
Hospice of SLO County  
Sara Otis  
1304 Pacific Street  
San Luis Obispo, CA 93401  
hospiceslo@hospiceslo.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
E977CDB1D8524A4...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

## 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

### PART 1: APPLICANT INFORMATION



**Organization Name: \***

Hospice of San Luis Obispo County

**Year Established: \***

1977

**Fiscal Agent, if different than above: \***

n/a

**Tax ID #: \***

953195126

**Document Certifying Federal Tax-Exempt status, if applicable**

Hospice SLO County\_IRS Determination Letter.pdf

42.4KB

**Name of Executive Director (or highest leadership position)**

Shannon McQuat

**Approximate Annual Budget:**

648,800

**Major Sources of Funding:**

Arthur N. Rupe Foundation, Bauer Foundation, Cambria Community Council, City of Arroyo Grande, City of Grover Beach, City of San Luis Obispo, Community Foundation of SLO County, County of San Luis Obispo, Gazin Foundation, GEMS (Gives Every Month) Donors, Giving Tuesday & Annual Appeal fundraisers, Light Up A Life fundraising event, Paul and Mary Russo Foundation, Robert Jansen Foundation, Rubin Foundation, Sinsheimer Foundation, Moca Foundation, A Walk For Healing fundraising event, Weyrich Foundation, private individual donations

**Mission Statement:**

Hospice SLO County is a non-medical volunteer hospice and community grief center. We support those facing a life-limiting illness, end of life, or grief by providing in-home support, caregiver respite, care management, grief counseling, support groups, community grief response, pet support, and education. We envision a community that recognizes death as a part of life, where dying and grieving are embraced as natural, where all have access to support services without charge, and where no one dies or is left to grieve without comfort.

**Number of paid staff (full- or part-time):**

8

**Number of volunteers:**

120

**Name of Board President or Chair:**

Dr. Terry Housinger

### **Organizational Leadership Chart \***

HSLO Org Chart and Board Roster.pdf

261.43KB

### **Name of Person completing this Application:**

Sara Otis

### **Organization Mailing Address: \***

Street Address

1304 Pacific Street

Address Line 2

City

San Luis Obispo

Postal / Zip Code

93401

State / Province / Region

CA

Country

USA

### **Phone: \***

(805) 544-2266

### **E-mail: \***

hospiceslo@hospiceslo.org

### **Briefly describe your organization's mission, primary activities, and operating structures.**

**ORGANIZATIONAL MISSION:** Hospice of San Luis Obispo County (HSLO) is a volunteer hospice serving San Luis Obispo County residents who are facing a life-limiting illness, end of life or grief. We depend 100% on community donations, fundraising events, grants, bequests and planned gifts, and the time and talent of over 120 volunteers to serve thousands of individuals annually. We provide free of charge services to those grieving or coping with life-limiting illness. We recognize death as a natural and personal event. In this spirit, we support the community by working with those near the end of life and the people who love them by providing in-home support, caregiver respite, grief counseling, support groups, community response and education. Unlike medical hospices, we do not restrict persons who have prognoses longer than six months, wish to continue aggressive or curative approaches, or wish to continue life-sustaining treatment. We offer services in partnership and collaboration with other health care provider agencies in the community. We offer grief and bereavement services to all members of the community regardless of whether their loved ones received hospice services from our organization. We believe that the end of life deserves as much respect as the beginning.

**PRIMARY ACTIVITIES:** Our organization supports the community by working with those near the end of life and the people who love them by providing in-home volunteers and caregiver respite, grief counseling and support groups, community response and education. All of our services are provided free of charge. A breakdown of our main services is offered below. Learn more about our services at [hospiceslo.org/services](http://hospiceslo.org/services).

- **In-home Volunteers** - Under the direction and facilitation of our Executive Director and Volunteer Coordinator, Hospice SLO County in-home volunteers offer practical help to clients as well as respite care to relieve family caregivers. Typically, our volunteers help by providing companionship and socialization to clients through reading, singing, actively listening, making crafts, gardening, taking clients out to lunch (as they are able), running errands, helping with light housekeeping and simple meal preparation, transporting clients to appointments, providing scribe services, offering life review and reminiscence, arranging pet therapy visits, providing "normalcy" to those with life-limiting illness and dementia, and holding space for anticipatory grief expression. Some in-home volunteer services have been altered to accommodate COVID-19 restrictions and physical distancing. In calendar year 2021, Hospice SLO County in-home volunteers provided over 3,000 hours of in-home respite care and compassionate support services, coordinated by our staff. Our in-home volunteers help to keep home caregivers mentally healthy as they care for a loved one with dementia or other life-limiting diagnosis. Caring for a spouse, parent, child, or other relative or loved one with dementia or other life-limiting illness is a significant undertaking, and primary caregivers often need support in order care for another while staying psychologically, physically, and emotionally well themselves. Our volunteers provide social connection to families caring for a dying

loved one, and can help them to cultivate resilience throughout the anticipatory grief process. Our volunteers support family members of all ages, from youth to seniors, and are a stabilizing source of support for the whole family. Our professional staff and volunteers are comprehensively informed about a variety of community resources and can make referrals to other services or community agencies when appropriate.

- **Auxiliary Support Services** - We offer a variety of auxiliary support options for clients, primary caregivers, and families including End-of-Life Doula volunteers to bring holistic care and vigil guidance to the dying person and their caregivers and family, Pet Peace of Mind volunteers to help seriously ill people and their caregivers with the care of their pets, Reiki Therapy volunteers to provide gentle and relaxing energy treatments to caregivers and their dying loved ones, Threshold Singers to soothe end-of-life clients and their loved ones with song, and more. Our auxiliary support services are run by our Executive Director, Volunteer Coordinator, and Care Manager, with help from part-time office staff and volunteers.

- **Care Management** - Hospice SLO County offers comprehensive Care Management to ease caregivers' burden of finding appropriate resources and developing informed care plans for their loved one. Our dedicated Care Manager (whose position is supported by a generous grant from the Arthur N. Rupe Foundation) meets with families to develop personalized care plans that align with the client's end of life trajectory, and coordinates referrals to other agencies that help those in our community. Our Care Manager specializes in supporting caregivers whose loved ones have been diagnosed with Alzheimer's or other forms of dementia. Our Care Manager and other core staff also provide education and tutorials on completing advance care directives, facilitate monthly Death Café virtual discussions, host guest speakers, and provide education at community events.

- **Grief Counseling** - Our grief counseling services include individualized and family therapy sessions, plus facilitated support groups and community grief response. Our organization approaches grief as a normal response to dying and death and views each person's grief as requiring a variety of support options to be made available. A major goal of our grief counseling services is to achieve a significant reduction in clients' self-reported symptoms as a result of their engagement with our counseling care. Symptoms of grief include—but are not limited to—feelings of disconnectedness or numbness, sadness and yearning, fatigue and decreased sleep, mood swings and tearfulness, waves of anger or other strong emotions, guilt or denial, difficulty handling the functions of daily life, neglecting self-care or other responsibilities, loss of appetite, and other symptoms. In calendar year 2021, Hospice SLO County delivered 3,275 hours of individual/family grief counseling through 2,936 sessions, plus 456 hours of group support through 273 facilitated support groups to those who needed emotional, social, and practical support after an anticipated, sudden, accidental, or traumatic death.

- **Support Groups** - Hospice SLO County offers a variety of Support Groups, several of which are specific to caregivers who are anticipating the loss of a loved one, grieving from a loss, or experiencing compassion fatigue. As of late March 2020, our support groups have moved to a virtual format (Zoom), making them not only more equitable but also more accessible to a greater number of community members. Support groups are facilitated primarily by our grief counselors, and by some volunteer facilitators. Community members can find ample support in our General Grief support groups, as well as in our targeted support groups for Family Caregivers, Compassion Fatigue, Spouse/Partner loss, Suicide Bereavement, and Pet Loss. Our vision is to expand our support group offerings to both virtual and in-person formats, so that they can accommodate the needs and preferences of a wider variety of community members who need support (including caregivers and family members who prefer Spanish language groups, plus groups for children, adolescents, teens, and young adults).

- **Community Grief Response** - Our Community Grief Response Team, comprised of our grief counselors and trained volunteers, provides timely counseling support, consultation, and education about grief and coping with loss, including anticipating a loss and coping with the shock of a sudden death. Community Grief Response services are provided to businesses, schools, churches, community agencies, and other groups. Our trained counselors work with both children and adults and consult with groups and agencies on the approach that feels most helpful to them. Recently, we have seen an increase in requests for Community Grief Response, especially from schools, businesses, and organizations that need support related to losses associated with COVID-19.

**OPERATING STRUCTURE:** Our organization currently has (8) eight employees (4 full-time and 4 part-time), and over 120 active volunteers. We rely entirely on donations, fundraising, grants and bequests for capital and operating expenses. Our social model utilizes professional staff to recruit, train and supervise



qualified volunteers, and to run our counseling and auxiliary support services. We depend on the time and talent of over 120 volunteers to serve thousands of individuals in our community annually.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

We are available to support all those in need throughout SLO County, regardless of their financial situation or cultural background, and we actively strive for inclusivity. Our services are available to all those throughout the entire County of San Luis Obispo. As our organizational capacity grows, we are deftly poised to launch targeted outreach initiatives to various marginalized populations and under-served areas of our community.

We consistently serve clients and families throughout San Luis Obispo, Paso Robles, Atascadero, Morro Bay, Los Osos, Arroyo Grande, and South County. During calendar year 2021, 21% of the clients who received in-home volunteer support from us were located in the North Coast area of SLO County, 21% were located in North County, 26% were located in SLO City, and 32% were located in South County. As we attract and train new community members for our in-home volunteer program, we are able to increase the scope and reach of our in-home support services more assertively. Currently, we are fortunate to have volunteers who reside in locations throughout the County, including in Nipomo, San Miguel, and North County who are able to serve clients and families on a weekly basis even in the more remote geographic areas of the county. We recently received a new grant from the City of Grover Beach to support outreach to Grover Beach residents, schools, businesses, and community organizations to spread awareness about our free of charge caregiver support and grief counseling services.

Our Volunteer Coordinator and Care Manager travel to prospective clients' homes to assess their needs and ensure the appropriateness of matching each family with one of our volunteers. We also regularly send volunteers to visit clients in care facilities, though this became more challenging during the COVID-19 pandemic. We also make our care management, grief counseling, and support groups accessible to a wider audience of SLO County residents by offering these services virtually via Zoom or phone, so that those with limited access to transportation (or who are homebound due to their primary caregiver responsibilities) can access our support when they otherwise would not be able to do so in person.

In terms of age of those who reach out to us, our call data from 2021 showed that of the 309 requests for new client support we received during that calendar year, the age range of the callers seeking support was 21 years old to 105 years old. Of the 309 calls, 189 were from a family member of someone with a life-limiting diagnosis, 29 calls were from a friend, 28 were from a professional contact, and 63 were from people requesting care for themselves. Of the clients who received in-home volunteer support from us in calendar year 2021, 59% identified as female, 40% identified as male, and 1% preferred not to say. Most of our in-home clients are seniors who have a diagnosis of Alzheimer's, a disease that does not discriminate. During calendar year 2021, for example, 52% of our in-home support clients identified as having some form of cognitive impairment. During calendar year 2021, the age range of the clients we served with in-home volunteer support was 52 to 105 years old. Of those clients, 17% were in the age range of 52-69 years old, 23% were 70-79 years old, 38% were 80-89 years old, 18% were 90-99 years old, and 4% were 100+ years old. In calendar year 2021, approximately 13% of the clients who received our in-home support identified as Veterans. Approximately 18% of the clients to whom we provided in-home support in calendar year 2021 were receiving medical hospice care in addition to our volunteer hospice support. In order to foster accessibility and inclusivity, we do not collect financial or other demographic data on our clients because it is not pertinent in our organization's process of accepting new clients, and not needed for them to qualify for our volunteer hospice care.

Our volunteer hospice services are unique in that they fill in gaps for support service needs throughout our community. We value inclusivity and support access for all. We are one of only 22 non-medical volunteer hospices left nationwide, which is significant because volunteer hospices dedicate themselves to providing access to all who are dying or grieving in the community, regardless of whether a condition or situation meets federal Medicare requirements. While our hospice volunteers do not provide skilled medical care, they offer an array of services that are comprehensive and would be difficult, if not impossible, to achieve in a setting restricted by third party reimbursements or regulatory mechanisms. Unlike Medicare-certified programs, volunteer hospices such as Hospice SLO County can serve those who continue to choose chemotherapy, radiation, or surgery with a curative focus. For low- or fixed-income families coping with end of life illness but lacking insurance coverage, we remain fully accessible and are here to help.

## PART 2: PROJECT INFORMATION



**Name of DE&I Project\***

Volunteer Training & Community Outreach

**Est. number of people served through this project:\***

350

**Est. number of SLO CITY RESIDENTS served through this project\***

250

**Total Project Cost:\***

50,000

**AMOUNT OF CITY FUNDING REQUESTED:\***

10,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

Hospice SLO County's High-Impact Diversity, Equity, and Inclusion project has two main components. The first component is comprehensive DEI-informed training for new in-home hospice volunteers so that our family of volunteers may continue to support those in our community coping with life-limiting illness and the challenges of home caregiving. The second component is a suite of outreach initiatives to marginalized, minoritized, or under-served populations in our area to spread awareness of and increase access to our free-of charge support services (namely in-home volunteer support, grief counseling, support groups, and auxiliary services such as End-of-Life Doula support, Pet Peace of Mind, and Threshold Singers). Outreach initiatives will be in the form of mailers, social media, and other media (print, radio).

A portion of the SLO City High-Impact DEI grant will sustain the comprehensive 30-hour In-Home Volunteer Training our staff conducts four times a year to prepare volunteers to assist clients with their needs, including in-home respite services for clients' caregivers and family. Our Executive Director, Volunteer Coordinator, and Care Manager coordinate our quarterly new volunteer training programs and invite established volunteers to attend refresher trainings to keep up on best practices and dementia advocacy. Our volunteer trainings explore personal attitudes towards death and dying, the history of hospice, current medical and non-medical approaches to end-of-life care, communication skills, anticipatory grief and bereavement, and practical and emotional support needs of clients and families, including sensitive attention to family dynamics.

The themes of inclusivity, diversity, and equity are woven throughout all aspects of the training, with an emphasis on empathic listening and human-to-human connection. Our trainings increase the cultural competence of future and current volunteers, preparing them to be of service to community members whose backgrounds or belief systems differ from their own. Additionally, we are actively enhancing our volunteer training program to increase the cultural humility, cross-cultural awareness, and understanding of implicit bias among our staff and volunteers. Through the comprehensive trainings we provide, our volunteers embody the awareness, attitude, knowledge, and skills for effectively and compassionately supporting all those facing end of life or anticipatory grief who wish to avail of our services. During calendar year 2023 (January 1 - December 31, 2023), we plan to recruit, train, and bring onboard 50+ new volunteers and to retain 70+ current volunteers and keep them in compliance. The costs associated with our volunteer training program account for personnel costs, onboarding costs for new volunteers, and supply costs for training materials.

Securing High-Impact DEI grant funding for outreach will directly translate to our organization being able to dedicate more staff hours towards a number of meaningful outreach projects that focus on increasing equity, awareness, and inclusivity. Collectively, our various outreach initiatives have the potential to reach thousands of community members throughout the City and County of SLO, including youth, adults, seniors, low-income families, Spanish-speakers, BIPOC, LGBTQI+, Veterans and military-affiliated families, and people with disabilities. This could translate into hundreds of new prospective client calls.

We have queued up a mailing initiative to reach out to all of the K-12 schools in SLO County to spread awareness to youth, families, faculty, and administrators about the free-of-charge support services our

awareness to youth, families, faculty, and administrators about the free-of-charge support services our organization offers to those anticipating or coping with the loss of a loved one. Of the 86 schools in SLO County, 14 are specifically in the City of SLO. Another outreach endeavor related to issue awareness and access that we have lined up is an outreach project to local doctors, businesses, and community organizations, in order to foster referrals and spread awareness of our free-of-charge support services. A number of outreach initiatives have been propelled by several members of our Board of Directors through their community connections, and our Development Director is at the ready to use outreach-specific grant funds towards targeted social media initiatives to spread awareness of our free-of-charge services to under-served demographics within our geographic area.

As our organizational capacity grows, we will offer a wider range of age-specific grief support groups for children, adolescents, teens, and young adults. Additionally, we are enthusiastically working to offer more Spanish speaking support services, and as such are preparing a multi-pronged outreach initiative for the members of our community who identify as Hispanic, while simultaneously endeavoring to destigmatize the practice of seeking counseling support for grief. We have been connecting with peer hospice organizations throughout the U.S. to glean best practices for our Hispanic outreach program, which is one of our top priorities for the coming fiscal year.

The two-fold DEI project described herein answers the call for greater access to care for all members of our community who need help coping with end of life illness, caregiving, loss, and grief. Hospice SLO County endeavors to reduce socioeconomic, racial and ethnic, age, gender identity, sexual orientation, and disability disparities by increasing access to in-home volunteer hospice care, grief counseling, care management, and the other support services we offer. As an organization, Hospice SLO County is unique in that we are a volunteer nonprofit, non-medical, social model hospice that serves clients experiencing grief or coping with a life-limiting illness free of charge. We are available to support all those in need throughout SLO County, and we do not discriminate on any basis. By being offered free of charge throughout SLO County, without the need for medical insurance qualification, all of our in-home caregiver support services are exponentially more accessible to a much wider range of community members, many of whom are primary caregivers to loved ones with Alzheimer's or other forms of dementia. We understand that death and grief are a natural part of the human experience, regardless of anyone's race, ethnicity, gender identity, sexual orientation, age, ability, socioeconomic status, political affiliation, citizenship, national origin, religion, language, intellectual or physical capacity, professional status, background, or beliefs. It is from this understanding that we empower our staff, volunteers, and affiliates to be indiscriminately supportive of all members of our community who are facing a life-limiting illness, caring for a loved one, or experiencing grief. We also offer a variety of support services virtually, in order to further increase access for those in remote areas of the county or whose caregiving situations make it challenging for them to visit our downtown SLO location. We send our volunteers to community members' homes, rather than requiring community members to come to us. We bridge an important gap in local services for the dying and grieving, and are often able to respond to requests for support more nimbly than other agencies are, by intentional design following the original volunteer hospice model.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

The members of our community who train to become hospice volunteers with our organization greatly benefit from the DEI content woven throughout our trainings. By training to become hospice volunteers, these warm-hearted members of our community become educated in not only the philosophy of hospice and practical service aspects of being a volunteer, but also in the knowledge and understanding that illness, dying, death, and grieving are experiences that affect all humans, regardless of their beliefs, backgrounds, or circumstances. Empathy, advocacy, and compassion are at the core of HSLO's existence as an organization and community resource. We promote an inclusive and welcoming environment that embraces diverse perspectives, cultures, and backgrounds. We actively cultivate diversity among our dedicated staff and growing family of hospice volunteers, and value an educational environment that challenges all forms of bias, including both intentional and unintentional bias. HSLO is dedicated to a path of learning about and confronting implicit bias, privilege, and systemic oppression, and is committed to striving towards social justice and inclusivity as an organization.

Beyond the new volunteers we train, the clients and caregivers we serve in the community will also benefit from and be supported by this project. The outreach components of our project have the potential to spread awareness of free-of-charge hospice support services to populations that might not have volunteer hospices on their radar; our outreach endeavors also aim to give access to under-served and low-income families who cannot access other types of care and could greatly benefit from in-home volunteer support, support groups, end of life doulas, or grief counseling. We aim to equitably and impartially support the community in working with those near the end of life and the people who love them by providing in-home support, caregiver respite, grief counseling, support groups, community response, and education. By offering all of our services free of charge and not billing third party providers, we aim to be as inclusive as possible to all those members of the community who wish to avail of our support. As a volunteer non-medical hospice, we are able to provide support to those members of the community who may not qualify for or have the means to access medical hospice, respite, counseling, or care services from other agencies. We believe that the end of life deserves respect, and that everyone is worthy of access to support through life limiting illness, dying, and grief.

All of our organization's support services are available to all those in need throughout SLO County, regardless of their financial situation or cultural background, and we actively strive for inclusivity. As our organizational capacity grows, so does our capacity to support those in need who have historically been under-served. With the SLO City High-Impact DEI grant, we will be able to launch outreach initiatives for youth, low-income families, Spanish-speakers, and other underserved populations through a variety of channels.

**Describe the equity gaps and community needs this project will address.**

Hospice SLO County endeavors to reduce socioeconomic, racial and ethnic, age, gender identity, sexual orientation, and disability disparities by increasing access to in-home volunteer hospice care, grief counseling, care management, and the other support services we offer. As an organization, Hospice SLO County is unique in that we are a volunteer nonprofit, non-medical, social model hospice that serves clients experiencing grief or coping with a life-limiting illness free of charge. By offering our services to the community without charge, we effectively eliminate the financial barrier to accessing services for SLO County residents. By being offered free of charge throughout SLO County, without the need for medical insurance qualification, all of our in-home caregiver support services are exponentially more accessible to a much wider range of community members, many of whom are primary caregivers to loved ones with Alzheimer's or other forms of dementia. We serve those in the low- or fixed-income brackets who may not have ready access to social services or are not able to pay for services. We also offer a variety of support services virtually, in order to further increase access for those in remote areas of the county or whose caregiving situations make it challenging for them to visit our downtown SLO location. We bridge an important gap in local services for the dying and grieving, and are often able to respond to requests for support more nimbly than other agencies are, by intentional design following the original volunteer hospice model.

Many residents of SLO City and County are currently experiencing the need for in-home hospice volunteer support for those facing or caring for a family member with dementia or other life limiting illness. Simultaneously, they are facing economic hardships that may prevent them from accessing much-needed support services related to health and wellness. Ongoing waves of grief, illness, and caregiver fatigue are sweeping SLO County, including areas of our community whose residents have historically underutilized HSLO's support services. Dealing with dementia and life limiting illness, loss, and grief is immensely challenging, and the COVID-19 pandemic has exacerbated these challenges, especially among low-income individuals and families. End-of-life and loss are ongoing phenomena, with the ten leading causes of death in California being heart disease, cancer, stroke, Alzheimer's disease, respiratory diseases, accidents, diabetes, influenza/pneumonia, hypertension, and liver disease/cirrhosis. Additional causes of death include homicide, suicide, drug overdoses, and infant mortality. To date, there have been over 500 COVID-19 related deaths in SLO County. Our organization continues to receive copious requests for support services from throughout the county, and many of our calls come from within the City of SLO. We are doing our best to make sure our agency rebuilds and diversifies its capacity so that we can continue providing much-needed support to our community through and beyond our 45th year of service.

It is easy for SLO residents to access our services: a simple phone call or email to our organization is all it takes to be connected with appropriate care. Prospective clients can also peruse our organization's website to explore the variety of services we offer, all provided free of charge. Clients and families who reach out to HSLO have access not only to our full range of services (in-home volunteers, grief counseling, support groups, and auxiliary services), but also to a wide range of community resources and referrals. Our professional staff and volunteers are comprehensively educated about a variety of community resources, and we have a dedicated Care Manager who coordinates referrals to other agencies that help in our community.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
# of new volunteers trained	At least 50 new volunteers trained by end of CY2023
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
# of new outreach initiatives launched	At least 3 targeted outreach initiatives launched by end of CY2023 (e.g., schools letters, doctors letters, social media initiatives)

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner

Example: ABC Business

Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes

Provide the timeline for this proposed project.

We anticipate using all High-Impact DEI grant funds by the end of calendar year 2023 (by the end of December 2023). We typically hold (4) four volunteer training programs per year, and DEI funds will be used to partially sustain (1) one or more trainings. We will dispatch 2-3 outreach initiatives upon receipt of funding and will carry out all grant-funded outreach initiatives by the close of calendar year 2023.

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

If awarded to our organization, High-Impact DEI grant funding from the City of SLO will contribute to sustaining our volunteer training program and growing our outreach endeavors beyond the award year by giving us momentum in our DEI-specific grant-seeking and fundraising efforts. We will leverage SLO City High-Impact DEI funding to secure grants from other sources (government, foundation, community, and private grants), plus community donations, bequests, and fundraising events to cover the remaining percentages of their salaries. To cultivate the sustainability of our quarterly volunteer trainings and to grow our outreach endeavors, our organization will leverage High Impact DEI grant funds in the following ways:

- By adding a DEI-focused grant to our list of current funding sources, we will demonstrate the increased diversification of our development strategies to other prospective grantors who prioritize diversity, equity, inclusivity, and justice. Hospice SLO County seeks grant funding from a variety of government sources (city, county, and federal), private foundations, community organizations, businesses, banks, and trusts on an ongoing basis.
- By specifically showcasing themes of DEI that permeate our volunteer trainings, we intend to communicate to other prospective funders the importance of supporting our vision to grow our core and supporting staff to be able to scale our programs and reach underserved populations. This year, for example, we are actively seeking grant funding to extend our grief counseling services for children, adolescents, teens, and young adults in SLO County who have lost a loved one.

High-Impact DEI funding from SLO City will serve as a bridge to additional funding that will help us grow our DEI efforts to support under-served members of our community who are coping with end of life illness, the challenges of home caregiving, or loss and grief. Securing High-Impact DEI grant support for our Volunteer Training program and outreach initiatives will free up our development staff to turn its sights towards funding opportunities that will support the growth of our grief counseling program, community grief response and other community education programs, plus community education programming (e.g., workshops, lectures, classes). Hospice SLO County will continue to actively pursue grant funding from a variety of sources to sustain and grow our services in the coming years. Necessity for client and caregiver support within our community has remained persistent during the pandemic, and Hospice SLO County aims to do everything it can to fortify our institutional capacity to respond to the ongoing demand for hospice volunteer support within our community. HSLO also continues collaborate with other local organizations in SLO including the Alzheimer's Association, the Community Counseling Center, and a variety of local health care providers in order to raise funds to collectively support the needs in the community.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 In-Home Volunteer Training costs (personnel, onboarding, supplies)	\$ 28,000.00	\$ 5,000.00	\$ 10,000.00

2 Outreach Initiatives (personnel, mailings, media costs)	\$ 22,000.00	\$ 5,000.00	\$ 10,000.00
--	--------------	-------------	--------------

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY



### Describe the plan for promoting this project within the City of San Luis Obispo.

We recruit new participants for our quarterly Volunteer Trainings on an ongoing basis year round, most notably through word-of-mouth from clients, families, and continuing volunteers as they serve the community. We also recruit for our Volunteer Trainings through our community e-newsletter, social media, and intermittent print/radio/media ads as funds are available. We keep an interest list of those who would like to attend future Volunteer Trainings.

For the outreach initiatives pertinent to this grant, we intend to promote our free-of-charge services through a variety of channels, namely mailers (letters/fliers), social media initiatives, and other media outlets.

### How will you highlight the City's support of your project?

Currently, the City of San Luis Obispo is highlighted as a Gold level sponsor on our website at hospiceslo.org/sponsors. The City of San Luis Obispo is one of our most important sources of funding. Most recently, we have received Grants in Aid (GIA) funding from the City of SLO, which makes a meaningful impact on our organization, in turn letting us make a positive impact on the community. We will also feature the City's support of our Volunteer Training and outreach initiatives in our community e-newsletter and blog. Our sponsors are also regularly acknowledged at our events and media interviews, where we emphasize the importance of grant funding (especially from city and county sources, as well as from foundations, community organizations, and businesses) to our ongoing operations as a social-model volunteer hospice.

## PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Sara Otis

### Signature \*

### Title: \*

Grants Consultant

### Date: \*

8/31/2022



Internal Revenue Service  
District Director

Department of the Treasury  
LA:E0:79 2416

Date: 08 NOV 1979

Our Letter Dated: July 27, 1978

Person to Contact: W. T. Mabry

Contact Telephone Number:  
(213) 688-4170

▷ Hospice of San Luis Obispo County  
1304 Pacific Street  
San Luis Obispo, CA 93401

— Gentlemen:

This modifies our letter of the above date in which we stated that you would be treated as an organization which is not a private foundation until the expiration of your advance ruling period.

Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section 170(b)(1)(A)(vi)\*. Your exempt status under section 501(c)(3) of the code is still in effect.

Grantors and contributors may rely on this determination until the Internal Revenue Service publishes notice to the contrary. However, a grantor or a contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 170(b)(1)(A)(vi)\* status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 170(b)(1)(A)(vi)\* organization.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

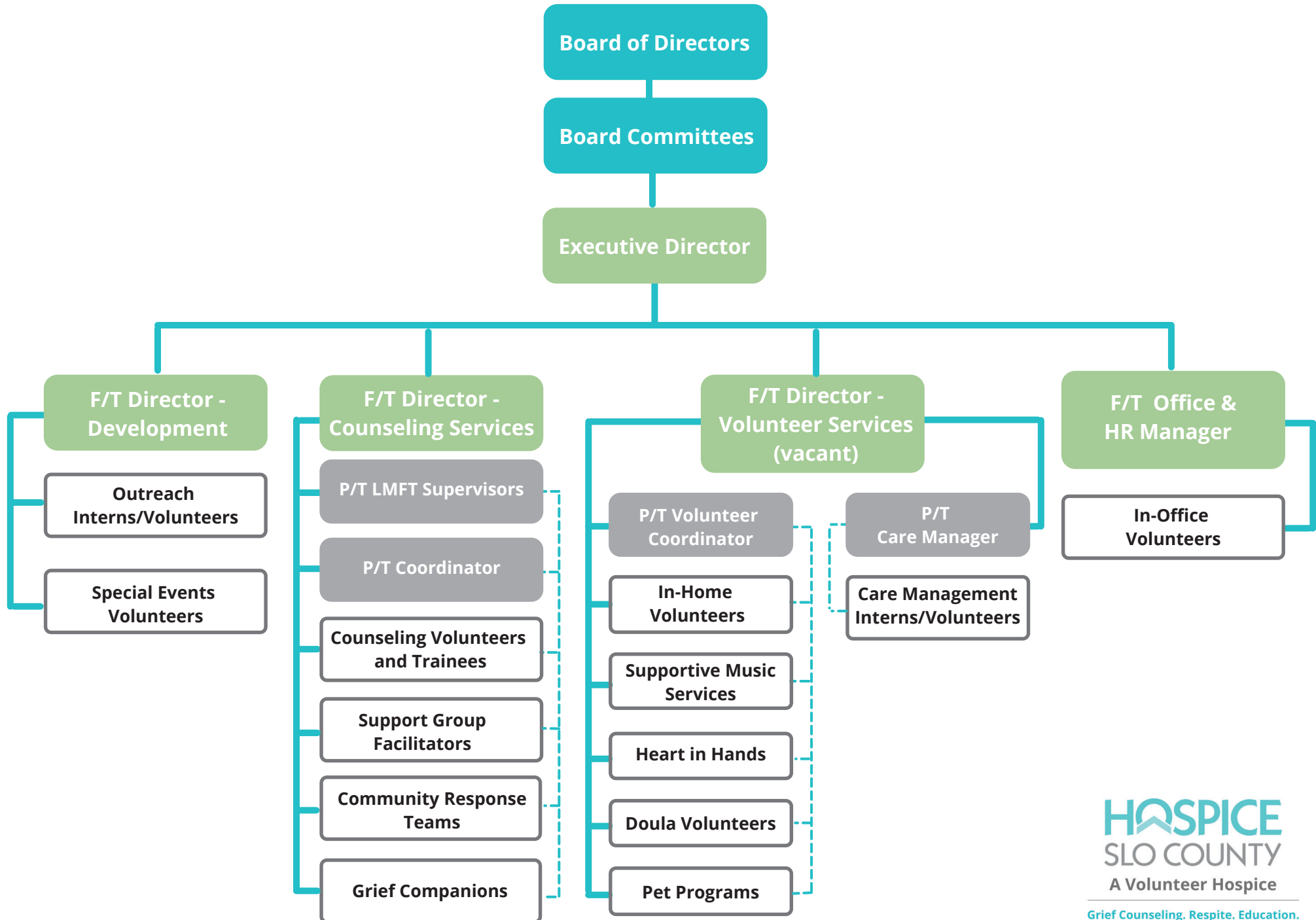
Sincerely yours,



W. H. Connett  
District Director

\* and section 509(a)(1)

# Hospice of San Luis Obispo County





## Hospice of San Luis Obispo County Board of Directors Fiscal Year 2022-2023

### **Dr. Terry Housinger, Chair**

2019 – 2023 (First Term)

Chair Term Ends: July 2023

Signer: Schwab & SESLOC

983 W. Highway 16 | Paso Robles | 93446

(406) 794-2740

thoser2@gmail.com

### **Abe Lincoln, Secretary/Interim Treasurer**

2020 – 2023 (First Term)

Signer: Schwab & SESLOC

1319 Alder Street | San Luis Obispo | 93401

(831) 402-9979

abelincoln4slo@gmail.com

### **Open Position, Treasurer**

### **Open Position, Member**

### **Rick Berard, Member**

2022 – 2025 (Second Term)

P.O. Box 2572 | Avila Beach | 93424

(978) 835-2748

rick.berard83@gmail.com

### **Dr. Lindsey Faucette, Member**

2020 – 2023 (First Term)

777 Pismo Street | San Luis Obispo | 93401

(805) 423-0509

drfaucette@slohealthcenter.com

### **Len Jarrott, Member**

2020 – 2023 (First Term)

1696 Trilogy Parkway | Nipomo | 93444

(805) 705-5135

lenjarrott44@gmail.com

### **Janice Mehring, Member**

2020 – 2023 (First Term)

3042 Fuente Del Oro | Atascadero | 93422

(805) 610-9532

janice.mehring@gmail.com

### **Debra Trout, Member**

2021 – 2024 (First Term)

890 Osos Street, Suite A | San Luis Obispo | 93401

(805) 458-2858

debra@troutandassociates.com

### **Kris Kington-Barker, Executive Director Emeritus**

2021 – 2024 (First Term)

4671 Tumbleweed Way | Paso Robles | 93446

(805) 471-1233

kriskingtonbarker@gmail.com

### **O'Leary Wallace LLP, Legal Counsel**

January 2022 - Present

3196 S Higuera Street, Suite E | San Luis Obispo | 93401

(805) 250-1562 | F: (805) 830-1885

janet@olearywallace.com | matthew@olearywallace.com

Exhibit B

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**Certificate Of Completion**

Envelope Id: 7789D7F4D1EB46C1BC0360C93FD19BF0

Status: Completed

Subject: Complete with DocuSign: Final Hospice of SLO County Completed Application Agreement (DEI Grant ...

Department:

Supplier:

Source Envelope:

Document Pages: 17

Signatures: 3

Envelope Originator:

Certificate Pages: 5

Initials: 0

Daniel Clancy

AutoNav: Enabled

990 Palm Street

Enveloped Stamping: Enabled

San Luis Obispo, CA 93422

Time Zone: (UTC-08:00) Pacific Time (US &amp; Canada)

dclancy@slocity.org

IP Address: 50.192.209.57

**Record Tracking**

Status: Original

Holder: Daniel Clancy

Location: DocuSign

11/21/2022 1:59:03 PM

dclancy@slocity.org

**Signer Events**

Shannon McOuat

shannonmcouat@hospiceslo.org

Executive Director

Security Level: Email, Account Authentication  
(None)**Signature**

DocuSigned by:



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Signature Adoption: Pre-selected Style

Using IP Address: 47.32.133.83

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Mark Amberg for Christine Dietrick

mamberg@slocity.org

Assistant City Attorney

Security Level: Email, Account Authentication  
(None)

DocuSigned by:



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Signature Adoption: Pre-selected Style

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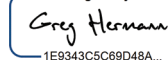
Greg Hermann

ghermann@slocity.org

Deputy City Manager

Security Level: Email, Account Authentication  
(None)

DocuSigned by:



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Signature Adoption: Pre-selected Style

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**Electronic Record and Signature Disclosure:**

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**In Person Signer Events****Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp**

Certified Delivery Events	Status	Timestamp
<b>Carbon Copy Events</b>		
Matt Melendrez mmelendr@slocity.org Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 12/14/2022 6:19:31 PM ID: 02a0a1c7-8b1f-4f3e-a5f6-f78190bef4bc	COPIED	Sent: 12/12/2022 12:56:49 PM Viewed: 1/12/2023 3:03:22 PM
Sara Otis hospiceslo@hospiceslo.org Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 11/21/2022 2:59:41 PM ID: 26527792-fa42-4549-8899-7b6a99ae5b2f	COPIED	Sent: 12/12/2022 12:56:51 PM
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
<b>Envelope Summary Events</b>		
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Envelope Updated	Security Checked	12/9/2022 2:15:16 PM
Envelope Updated	Security Checked	12/9/2022 2:15:17 PM
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Envelope Updated	Security Checked	12/9/2022 2:15:17 PM
Envelope Updated	Security Checked	12/9/2022 2:15:17 PM
Envelope Updated	Security Checked	12/9/2022 2:15:17 PM
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Signing Complete	Security Checked	12/12/2022 12:56:47 PM
Completed	Security Checked	12/12/2022 12:56:51 PM
Payment Events	Status	Timestamps
<b>Electronic Record and Signature Disclosure</b>		



## **ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

From time to time, Carahsoft OBO City of San Luis Obispo (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through your DocuSign, Inc. (DocuSign) Express user account. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

### **Getting paper copies**

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. For such copies, as long as you are an authorized user of the DocuSign system you will have the ability to download and print any documents we send to you through your DocuSign user account for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

### **Withdrawing your consent**

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

### **Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of your DocuSign account. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use your DocuSign Express user account to receive required notices and consents electronically from us or to sign electronically documents from us.

### **All notices and disclosures will be sent to you electronically**

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through your DocuSign user account all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

**How to contact Carahsoft OBO City of San Luis Obispo:**

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: [keriksso@slocity.org](mailto:keriksso@slocity.org)

**To advise Carahsoft OBO City of San Luis Obispo of your new e-mail address**

To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address..

In addition, you must notify DocuSign, Inc to arrange for your new email address to be reflected in your DocuSign account by following the process for changing e-mail in DocuSign.

**To request paper copies from Carahsoft OBO City of San Luis Obispo**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.

**To withdraw your consent with Carahsoft OBO City of San Luis Obispo**

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your DocuSign account, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail, full name, US Postal Address, telephone number, and account number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

**Required hardware and software**

Operating Systems:	Windows2000? or WindowsXP?
Browsers (for SENDERS):	Internet Explorer 6.0? or above
Browsers (for SIGNERS):	Internet Explorer 6.0?, Mozilla FireFox 1.0, NetScape 7.2 (or above)
Email:	Access to a valid email account
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	<ul style="list-style-type: none"><li>•Allow per session cookies</li><li>•Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection</li></ul>

\*\* These minimum requirements are subject to change. If these requirements change, we will provide you with an email message at the email address we have on file for you at that time providing you with the revised hardware and software requirements, at which time you will have the right to withdraw your consent.

**Acknowledging your access and consent to receive materials electronically**

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

By checking the 'I Agree' box, I confirm that:

- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Carahsoft OBO City of San Luis Obispo as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by Carahsoft OBO City of San Luis Obispo during the course of my relationship with you.

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/1/2022 | 3:25 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Leadership SLO (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to The Representation in Leadership SLO Initiative as submitted in its application to the CITY on August 31, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$4000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

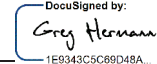
Leadership SLO  
895 Monterey Street  
San Luis Obispo, CA 93401  
dan@slochamber.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
B7EF08ED4508432

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E9343C5C69D48A  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
49590B18C87B45D  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

Exh. A

## 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

### PART 1: APPLICANT INFORMATION



**Organization Name: \***

San Luis Obispo Community Leadership Foundation: Leadership SLO

**Year Established: \***

1991

**Fiscal Agent, if different than above: \***

n/a

**Tax ID #: \***

770417076

**Document Certifying Federal Tax-Exempt status, if applicable**

IRS Tax Determination Letter-Leadership SLO.pdf

483.76KB

**Name of Executive Director (or highest leadership position)**

Dan Rivoire

**Approximate Annual Budget:**

145,000

**Major Sources of Funding:**

Tuition, Sponsorships, Fundraising

**Mission Statement:**

We are a diverse corps of leaders advancing the educational, cultural, health, and economic interests of SLO County Citizens

**Number of paid staff (full- or part-time):**

1

**Number of volunteers:**

80

**Name of Board President or Chair:**

Skye Christakos

**Organizational Leadership Chart \***

Board of Directors.pdf

84.85KB

**Name of Person completing this Application:**

Dan Rivoire

**Organization Mailing Address: \***

Street Address

895 Monterey Street

Address Line 2

City

San Luis Obispo, CA 93401

State / Province / Region

CA

Postal / Zip Code

93401

Country

United States

**Phone: \***

805.234.3024

**E-mail: \***

dan@slochamber.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

Leadership SLO's mission is to build a diverse corps of leaders advancing the educational, cultural, health and economic interests of SLO County citizens.

Each year, the program ushers 36 unique individuals through a 10-month journey of academic and hands-on learning to forge unbreakable relationships and establish a deep understanding of all the things that make our region work.

Our monthly educational sessions focus on various silos of community life featuring experts from each field that provide context of what they do while digging deep into the difficult or controversial issues they face. Topics cover media and communication, arts and education, diversity and inclusion, business and economic development, government and sustainability, health and human services, agriculture and manufacturing, criminal and civil justice.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

We support community members from throughout San Luis Obispo County with a focus on building a diverse cohort each year that includes individuals in different career stages, professional fields, industry sectors, political views, ages, gender identity, sexual orientation, city of residence, and is representative of the County's race demographics.

**PART 2: PROJECT INFORMATION****Name of DE&I Project \***

The Representation in Leadership SLO Initiative

**Est. number of people served through this project: \***

70

**Est. number of SLO CITY RESIDENTS served through this project \***

40

**Total Project Cost: \***

6,000

**AMOUNT OF CITY FUNDING REQUESTED: \***

4,000

**Describe your proposed project or program.**



Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

We are excited to request funding to enhance Leadership SLO's capacity to provide leadership development opportunities to traditionally marginalized community members while educating community members on how to put inclusivity focused values into action. City funds will empower Leadership SLO to:

- 1) Launch an inclusivity mentors program designed to improve the sense of belonging of Leadership SLO Cohort members from marginalized community by pairing them with alumni that share their experience and perspective.

- 2) Enhance our Diversity and Inclusion Day session established in 2022 to dig deeper into the economic and social importance of building an inclusive community and how to support change.

- 3) Research establishing and building a sustainable business model around a BIPOC serving Leadership SLO program

#### **Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

This initiative will support community members from marginalized backgrounds seeking to participate and thrive in Leadership SLO. Not only will the initiative lead to greater participation in the program from members of marginalized communities, it will enhance their experience therein, and subsequently boost those individuals' trajectory into community Leadership roles. Each year, approximately 8-20% of our cohort is nonwhite, yet we remain concerned that participants may be left feeling tokenized or otherwise underserved by the program. Your support will help us respond to these concerns.

#### **Describe the equity gaps and community needs this project will address.**

Despite values that cherish diversity, Leadership SLO continues to attract an applicant pool that is not representative of community demographics, only 8-20% are from a nonwhite background. Consequently, marginalized community groups remain underrepresented in Leadership position's in the public, private, and nonprofit sectors. While that remains a reality, Leadership SLO is not accomplishing our mission to be a diverse corps of leaders advancing interests of SLO County Citizens.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

<b>Methods of Evaluation</b>	<b>Indicators of Success / Measurable Outcomes</b>
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Measure satisfaction of Leadership SLO participants from marginalized communities	Establish baseline in 2022, increase by 15% in 2023
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Improve representation of marginalized populations in Leadership SLO annual cohort	Increase representation of each marginalized community by 6%
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Determine viability of BIPOC serving leadership program	Yes / No determination

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

<b>Name of Partner</b>	<b>Activity/Service They Provide for This Project</b>
Example: ABC Business	Example: Free Use of Space for Weekend Classes
San Luis Obispo Botanical Garden	Reduced Rental Fees for Venue for Diversity Day
Example: ABC Business	Example: Free Use of Space for Weekend Classes
GALA Pride and Diversity Center	Researching BIPOC Leadership Program
Example: ABC Business	Example: Free Use of Space for Weekend Classes
R.A.C.E. Matters SLO	Researching BIPOC Leadership Program

Example: ABC Business  
Diversity Coalition of San Luis Obispo County  
  
Example: ABC Business  
SLO Sheriff's Department

Example: Free Use of Space for Weekend Classes  
Researching BIPOC Leadership Program  
  
Example: Free Use of Space for Weekend Classes  
Researching BIPOC Leadership Program

Provide the timeline for this proposed project.

If funded, we will embark on all aspects of this initiative in December of 2022 with the following timeline for each component:

- 1) Inclusivity Mentors Program: established in January 2023 in coordination with Leadership SLO Class 31's launch, retreat, and initial sessions.
- 2) Diversity and Inclusion day is expected to take place in March of 2023 so work to improve the quality of this session will take place in Jan/Feb of 2023.
- 3) Research regarding program expansion to specifically serve BIPOC community members will commence with in depth partner engagement in Quarter 1 of 2023 with determinations regarding program viability in Quarter 2 2023 and the potential to launch the program in Quarter 4.

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

Leaderships SLO's core business model is built through a healthy balance of earned revenue, business sponsorship, and charitable giving. This initiative will be supported in an ongoing basis by adding grant funding and increased support from sponsor partners that are establishing a more values driven sponsorship model to our revenue portfolio.

PART 3: PROJECT COST / BUDGET

Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Inclusivity Mentors Program	\$ 1,500.00	\$ 1,000.00	\$ 500.00
2 Diversity and Inclusion Day	\$ 3,000.00	\$ 2,000.00	\$ 1,000.00
3 BIPOC Leadership Program Research	\$ 1,500.00	\$ 1,000.00	\$ 1,000.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

PART 4: AWARENESS AND VISIBILITY

Describe the plan for promoting this project within the City of San Luis Obispo.

Leadership SLO has a strong community following with over 1000 alumni featuring a strong social media following and email database. We are proud of our program adjustments in recent years and will feature these changes and city support in our communications there. More importantly however, is our outreach efforts through our annual recruitment process targeted at businesses and nonprofits outside the Chamber community where we will highlight these initiatives a means to better attract a diverse candidate pool in coming years.

How will you highlight the City's support of your project?

We will name the City as a sponsor partner to Leadership SLO at the Challenge or Inspire level with recognition on our website, in our newsletter, day session materials and at monthly events.

PART 5: CERTIFICATION

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person completing this Application: \***

Dan Rivoire

**Signature \***

A handwritten signature in black ink on a light gray rectangular background. The signature is stylized, starting with a large 'D' and ending with a cursive 'Rivoire'.

**Title: \***

Executive Director

**Date: \***

8/31/2022



# Board of Directors

**President**

Skye Christakos

**Treasurer**

Branden Welshons

**Secretary**

Steffanie Medina

**SLO Chamber****Representatives**

Jim Dantona, President, CEO

LeBren Harris, Chair

Jessica Steely, Past Chair

**At Large**

Jay Beck

Michael Boyer

Whitney Gordon

Bryan Idler

Erik Linkugel

Dana Matteson

Leann Standish

Maggie Tillman

John Tricamo

# Executive Director

Dan Rivoire

**Class Chair**

Dana Matteson

**Day Coordinators**

10-20 Volunteers Annually

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

**SEP 28 2000**

SAN LUIS OBISPO COMMUNITY  
LEADERSHIP FOUNDATION  
1039 CHORRO ST  
SAN LUIS OBISPO, CA 93401

Employer Identification Number:

77-0417076

DLN:

17053260701010

Contact Person:

JOHN JENNEWBEIN

ID# 31307

Contact Telephone Number:

(877) 829-5500

Our Letter Dated:

November 1996

Addendum Applies:

No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(2).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(2) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(2) organization.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Letter 1050 (DO/CG)

-2-

SAN LUIS OBISPO COMMUNITY

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,

Steven T. Miller

Steven T. Miller  
Director, Exempt Organizations

Letter 1050 (DO/CG)

**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)



**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/5/2022 | 1:49 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and RACE Matters SLO County (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to Style and Substance: A Year Long Activation as submitted in its application to the CITY on August 31, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$40,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

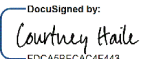
City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

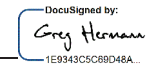
RACE Matters SLO County  
PO BOX 5215  
San Luis Obispo, CA 93403  
hello@racemattersslo.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
FDCA5BECAC4F443...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E9343C5C8B0D48A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
49580B18C87B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion Exh. A

## 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

### PART 1: APPLICANT INFORMATION

**Organization Name: \***

RACE Matters SLO County

**Year Established: \***

501(c)3 since 2021, founded in 2016

**Fiscal Agent, if different than above: \***

N/A

**Tax ID #: \***

861879181

**Document Certifying Federal Tax-Exempt status, if applicable**

EIN-2021-02-04 (3).pdf

13.58KB

**Name of Executive Director (or highest leadership position)**

Courtney Haile

**Approximate Annual Budget:**

142,000

**Major Sources of Funding:**

Grants, Individual Donors, Events

**Mission Statement:**

To create artistic, cultural, educational, and social experiences that amplify Black voices and matters of racial justice.

**Number of paid staff (full- or part-time):**

1

**Number of volunteers:**

15

**Name of Board President or Chair:**

Julie Lynem

**Organizational Leadership Chart \***

IMG-0831.JPG

115.37KB

**Name of Person completing this Application:**

Courtney Haile

**Organization Mailing Address: \***

Street Address

P.O. Box 5215

Address Line 2

City

SAN LUIS OBISPO

Postal / Zip Code

93403

State / Province / Region

CA

Country

United States

**Phone: \***

415-264-8641

**E-mail: \***

hello@racemattersslo.org

**Briefly describe your organization’s mission, primary activities, and operating structures.**

R.A.C.E. Matters' core mission is to create artistic, cultural, educational, and social experiences that amplify Black voices and matters of racial justice.

We carry out our mission and amplify Black voices and matters of racial justice in our community through a wide range of programmatic initiatives. The three main elements of our core programming include:

**Creation of Black-centered social spaces:** We organize a variety of social and cultural events for and centered around the local Black community, helping to build ties among local Black residents, families, and businesses, and contributing to the fostering of Black culture locally. We regard the creation of these unapologetically Black spaces as vital to the affirmation of Black cultural identities, the building of community among Black people, and upholding Black dignity within an overwhelmingly White community.

**Cultural events and arts exhibitions that center Black creative expressions:** We organize an extensive range of arts events that engage our local community with the works of Black artists as well as Black-focused works. From visual arts programs to performing arts events to films—including two films that we have produced as well as other films that we have screened for the local community—our programs utilize an expansive array of media to uplift and amplify the voices of underrepresented Black and other POC populations. These events and programs reflect our belief in the necessity of art to the cultivation of human belonging, the empowerment of underserved and underrepresented communities, and the envisioning of a more just and equitable world.

**Racial justice educational programming:** We organize community dialogues, panel discussions, workshops, and trainings that contribute to a broader culture of racial justice within our community. Our educational programming has ranged widely, from racial justice-oriented yoga workshops, to educational workshops on White privilege, a panel and forum focused on the subject of cultural appropriation, webinars devoted to the racial dimensions of the COVID-19 crisis locally and the challenges and possibilities of homeschooling children of color in the pandemic.

Our pursuit of our mission extends to our internal operations and organizational structure as well. We are a Black-led, multiracial organization that believes firmly that racial justice is not just a goal, but a practice that applies to our daily interactions and engagements with each other. We are driven by a vision of community that pushes no one to the margins, celebrates diversity, and works together toward the building of an inclusive culture of belonging. R.A.C.E. Matters was founded in 2016 by Executive Director, Courtney Haile. (The acronym stands for Responsibility, Action, Culture, and Education.) By engaging the public through dialogue, workshops, and direct action organizing, the group has emerged as a publicly recognized local leader in matters of race relations. Haile and other members of our Black-led, multiracial organization have extensive experience in event organizing, public speaking, outreach, publicity, and education. We collectively make decisions, develop initiatives, coordinate programs on behalf of our organization for our local community. We also operate a parent- and family-oriented sub-group, RaiseUp SLO, which works to incorporate children and family-oriented elements into our programming whenever possible, and to foster an inclusive and supportive environment for children of color in SLO through community building, education and advocacy. We are supported by an expansive team of volunteers who help to implement our programming and fulfill our mission.

Executive Director Courtney Haile is currently a compensated contractor who manages creative and administrative volunteers and contractors. She is the creative visionary behind the salon concept and has received and will continue to receive guidance from community, non-profit, business, legal, and arts leaders.

### **Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

R.A.C.E. Matters was founded in response to anti-Black racism and focuses on amplifying Black voices, issues and needs in particular. The organization has also hosted events, led initiatives, and created media content that speaks more broadly to racial justice and experiences of other communities of color-- and has offered anti-racist education to the general public.

## **PART 2: PROJECT INFORMATION**



### **Name of DE&I Project\***

Style and Substance: A year-long Activation

**Est. number of people served through this project: \***

8000

**Est. number of SLO CITY RESIDENTS served through this project \***

5000

**Total Project Cost: \***

118,150

**AMOUNT OF CITY FUNDING REQUESTED: \***

95,150

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

We are seeking funds to support the year-long activation of a Black-centered multicultural space and salon pilot program.

Style and Substance is a year-long activation of a Black-centered multicultural space that functions as a salon for visiting stylists who specialize in Black hair care that will also provide

- 1) Space for cultural exhibits and events by R.A.C.E. Matters and aligned organizations and social groups, building community and laying collaborative groundwork for the proposed multicultural center.
- 2) Office space/headquarters for R.A.C.E. Matters, with resources about aligned community organizations and social groups.
- 3) Retail space that sells merchandise to benefit R.A.C.E. Matters, potentially expanding to Black owned/ Black centered goods, and other culturally affirming products.
- 4) Space to teach Black hair care to future Black hair care entrepreneurs and caretakers of Black children.

R.A.C.E. Matters seeks funds for rent, utilities, supplies, equipment, materials, and staffing to activate a year-long salon pilot and Black-centered multicultural space. An over 2,000 square foot space at Network Shopping Center at 778 Higuera in downtown San Luis Obispo is currently available for lease. The unique layout includes existing plumbing outfitted for a previous salon tenant, reception area, elevator for ADA access, and partitioned spaces that could potentially house exhibits or events for aligned organizations and social groups such as Diversity Coalition, Latino Outreach Council, AAPI SLO, Cal Poly Black Student Union, and more. R.A.C.E. Matters personnel and volunteers, with guidance from applicable experts, will manage space, programs, and events – renting space to licensed stylists as well as to aligned organizations and social groups. Upstairs business neighbors in the Network would include Nigerian artist, longtime SLO resident, and prior R.A.C.E. Matters collaborator Abbey Oniyoki and Bliss Cafe -- who displayed an extension of our 2021 "we are here" exhibit and regularly host youthful arts and music events. This potential synergy between tenants makes for an organic artistic and cultural hub.

R.A.C.E. Matters personnel and volunteers will benefit from their relationships with non-profit and business experts, arts and cultural specialists, 30 year veteran salon owner and licensed cosmetologist Delores Smith, and current traveling stylist Caprishia Daniels who has built a strong client base in SLO after three visits thus far in 2022. R.A.C.E. Matters personnel are in communication with property manager Bill Carpenter and have toured the space with Mayor Erica Stewart and salon consultant Smith. As owners of the Network Shopping Center are awaiting approval from the city for a building renovation, this activation is intended as a year-long, temporary, experimental pilot that invites San Luis Obispo to experience being a city with a Black centered multicultural space that is grounded in servicing and celebrating Black hair. With an eye towards both a permanent salon and the proposed multicultural center, R.A.C.E. Matters and community partners will learn what works well while building towards sustainable solutions. Due to its large size and likely temporary nature, the aforementioned commercial space is unlikely to draw another interested tenant, and project stakeholders will negotiate the currently listed \$2,500 monthly rent.

Prior, existing, and future R.A.C.E. matters programs funded by other sources can be housed and/or exhibited in the Style and Substance space. For the 2022 and 2023 grant periods, R.A.C.E. Matters has been awarded \$10,000 by Colorado organization RMI to support Climate Justice-based arts programming, as well as \$15,000 from the City of San Luis Obispo's Human Relations Commission for our NoireSLO Black-centered social programs. Elements of these programs along with prior photography, multimedia exhibits, and films created by R.A.C.E. Matters are among the resources available for the Style and Substance activation.



R.A.C.E. Matters is also an applicant and co-applicant for other funding within the 2023 grant period for programs that meaningfully intersect with the Style and Substance vision including:

\* In collaboration with the City of San Luis Obispo Office of Sustainability, R.A.C.E. Matters was invited to co-apply for over \$1,000,000 in funding from state of California Regional Climate Collaborative Program for capacity building around racial and climate justice. Capacity building may include staffing, space rental, community building, and programmatic support for R.A.C.E. Matters' artful approach to justice.

\* R.A.C.E. Matters was invited to apply for \$40,000 in funding from BlocPower to execute innovative multimedia marketing, outreach, and education to under-resourced communities around future electrification requirements.

\* R.A.C.E. Matters, in collaboration with San Luis Obispo Museum of Art, has applied for a Project Grant from Cal Humanities to bring Los Angeles-based artist April Banks to San Luis Obispo to spearhead Braiding Water: a multi-location humanities and arts experience centering BIPOC communities relationship with water. San Luis Obispo Museum of art has applied for the "Our Town" grant from the National Endowment for the Arts to extend Braiding Water through 2024.

Estimated number of people impacted over year-long Activation:

Salon: 100 clients

Cultural Center Exhibits + Events: 8,000 viewers and attendees (estimated 150 weekly exhibit walk-ins from downtown San Luis Obispo, event attendees for R.A.C.E. Matters, and guest organization events).

#### **Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

As both this funding opportunity and the proposed multicultural center exist in response to the local Black-led racial justice movement in 2020 that was primarily organized around anti-Black racism, we approach this project with an imperative to prioritize the expressed needs of the local Black community while affirming and collaborating with other minoritized and marginalized racial and ethnic communities.

The Style and Substance activation and pilot will serve local Black and other communities of color in SLO by addressing the glaring need for Black hair care resources and by actively creating Black-centered and multicultural spaces of belonging, affirmation, expression, and community-making within an overwhelmingly white-dominant city. There will also be time, space, exhibits, and events that will provide education for the general public.

It will serve low-income residents, residents with disabilities, and other residents who commonly experience material and physical barriers to social and cultural access within SLO. We aim to maximize accessibility and inclusivity in all aspects of our planning and to nurture a culture of inclusivity and belonging in the most thoroughgoing sense. We also aim to utilize the salon/cultural space that we are proposing in ways that maximize its benefits for local communities in need.

It will serve the SLO city community as a whole in at least 3 primary ways:

- 1) Supporting the wellbeing and self-expression of the local Black community benefits all of us. Ensuring that Black SLO residents have spaces of belonging, resources for wellbeing and community building is necessary to the cultivation of a SLO in which all people can thrive and all are welcome.
- 2) The program(s) that this grant will support also presents opportunities for community-wide learning by increasing the exposure of local white-majority residents to Black voices and creative cultural expressions. Such engagements across difference promise to advance dialogues about racial justice concerns in ways that are fundamentally collaborative and potentially transformative.
- 3) This grant also carries promising possibilities for contributing to the broader goal of increasing diversity in SLO, increasing the retention of Black and other POC residents within the local area, and laying collaborative ground work for the proposed multicultural center. By foregrounding Black well-being and self expression, and nurturing community building amongst other minoritized and marginalized racial, ethnic, and cultural communities in SLO, the program proposed here will help to make SLO into a place that can attract people from diverse backgrounds and where such folks can feel more truly at home.

#### **Describe the equity gaps and community needs this project will address.**

There is a dire need for Black hair care specialists in San Luis Obispo City and County. It is common for Black residents of San Luis Obispo to drive to Lompoc, the Central Valley, the Bay Area, and Los Angeles to get their hair done. We propose to address this gap in our community while contributing to a sense of place and belonging among Black SLO residents and other communities of color. Physical, Black centered multicultural space is vital to the dignity and wellbeing of our Black community in a local region where we are distinctly minoritized and often marginalized. According to the 2020 census, the city of San Luis Obispo is 1.5% Black, compared to 6% statewide, and 84% White, compared to 36% statewide. This demographic profile creates challenges to the building of discussions about race and inequality, which in turn, reinforces patterns of marginalization and exclusion for local communities of color, especially Black communities. Within this context, the need to uplift and amplify the voices of people of color in general and Black people in particular, and to build and maintain spaces of affirmation and empowerment within our local community, is critical.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIPOC serving on public boards, committees # of visiting stylists	Example: 10% increase by end of 2021 At least 4 regular stylists on rotation
Example : # of BIPOC serving on public boards, committees # of clients served by stylists	Example: 10% increase by end of 2021 25 clients for each stylist by end of 2023
Example : # of BIPOC serving on public boards, committees # of guest organizations hosting exhibits/events	Example: 10% increase by end of 2021 6-12 cultural and/or activist organizations using space for events or exhibits
Example : # of BIPOC serving on public boards, committees weekly # of walk-in visitors to exhibits	Example: 10% increase by end of 2021 150, tracked with crowd counter, or by staff
Example : # of BIPOC serving on public boards, committees Quality of experience for BIPOC visitors	Example: 10% increase by end of 2021 Positive feedback on surveys and/or in focus groups

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner	Activity/Service They Provide for This Project
Example: ABC Business Delores Smith - A Personal Touch Salon - Consultant	Example: Free Use of Space for Weekend Classes In-kind guidance and consultation, connections to potential clients and guests stylists
Example: ABC Business Caprisha Daniels, Loving Your Natural Self, Traveling Stylist	Example: Free Use of Space for Weekend Classes Current visiting stylist will give ongoing feedback on process
Example: ABC Business Diversity Coalition of San Luis Obispo County	Example: Free Use of Space for Weekend Classes Host events in Style and Substance Space, Promotion
Example: ABC Business	Example: Free Use of Space for Weekend Classes

Provide the timeline for this proposed project.

R.A.C.E. Matters personnel and volunteers have been strategizing around the salon concept for nearly a year and have facilitated three visits by stylist Caprisha Daniels since March 2022. We will continue to fundraise, strategize, and commence research, development, and community building around this vision. Project execution would commence upon notification of funding, prior to distribution of funds, with existing R.A.C.E. Matters funding. The timeline:

Now - December 2022: research and development including outreach to interested stylists, developing sample contracts and agreements, outreach to potential guest organizations, artists and interior designer, outline of multicultural collaboration including process, community agreements, and hours of operation, continued meeting with applicable experts.

Upon funding notification or January 2023, which ever comes sooner: Finalize contracts with visiting stylists, sign lease with property manager, finalize and prep initial art installations, install office, decor, and salon stations.

January- December 2023: Activate Style and Substance: Visiting Salon and Black-centered cultural space.

**Describe your plan for sustainability beyond the City's one-year award funding, if applicable.**

Although this proposal is for a temporary activation and pilot, the ultimate goal is to have a permanent salon and Black-centered cultural center that precedes and compliments the proposed multicultural center that will likely take years to implement. A successful pilot will attract the donors and grant funding needed to make a more sustainable salon and Black-centered cultural center possible.

## PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Rent, 1 year- \$2,500/mo.	\$ 30,000.00	\$ 30,000.00	\$ 0.00
2 Project Personnel: Assistant (\$20/hr, 20 hours per week, 52weeks + 1.4% payroll costs)	\$ 29,120.00	\$ 29,120.00	\$ 0.00
3 Project Personnel: Creative Director, Stipend	\$ 16,000.00	\$ 16,000.00	\$ 0.00
4 Salon Equipment	\$ 3,000.00	\$ 3,000.00	\$ 0.00
5 Licenses & Permits	\$ 140.00	\$ 140.00	\$ 0.00
6 Other Salon and Cleaning Supplies	\$ 1,280.00	\$ 1,280.00	\$ 0.00
7 Insurance	\$ 700.00	\$ 700.00	\$ 0.00
8 Utilities	\$ 4,236.00	\$ 4,236.00	\$ 0.00
9 Marketing - Domain hosting	\$ 200.00	\$ 200.00	\$ 0.00
10 Streaming Services	\$ 474.00	\$ 474.00	\$ 0.00
11 Culturally affirming interior design and decor: labor and materials	\$ 8,800.00	\$ 8,800.00	\$ 0.00
12 Audio/Visual Equipment	\$ 1,200.00	\$ 1,200.00	\$ 0.00

13	Climate Justice Arts Programming funded by RMI	\$ 10,000.00	\$ 0.00	\$ 10,000.00
14	Creative Direction by R.A.C.E. Matters Executive Director	\$ 8,000.00	\$ 0.00	\$ 8,000.00
15	Additional programmatic support	\$ 5,000.00	\$ 0.00	\$ 5,000.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY



### Describe the plan for promoting this project within the City of San Luis Obispo.

R.A.C.E. Matters, community partners, and stakeholders including visiting stylists will promote the Style and Substance activation. In the City of San Luis Obispo this will include posters and flyers in downtown businesses including the Downtown SLO Association and Chamber of Commerce, a meaningful promotional partnership with Cal Poly including their Black Faculty and Staff, Multicultural center, and Black Student Union, regular promotion at Farmer's Market, R.A.C.E. Matters and community partner events, -- plus print ads, social media, radio and media placement.

### How will you highlight the City's support of your project?

The City Logo will be used when ever possible in print, online, and mobile marketing of this project.

## PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Courtney Haile

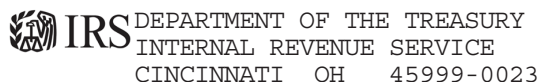
### Signature \*

### Title: \*

Executive Director

### Date: \*

8/31/2022



Date of this notice: 02-04-2021

Employer Identification Number:  
86-1879181

Form: SS-4

Number of this notice: CP 575 E

RACE MATTERS SLO COUNTY  
PO BOX 5215  
SN LUIS OBISP, CA 93403

For assistance you may call us at:  
1-800-829-4933

IF YOU WRITE, ATTACH THE  
STUB AT THE END OF THIS NOTICE.

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 86-1879181. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

When filing tax documents, payments, and related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear-off stub and return it to us.

When you submitted your application for an EIN, you checked the box indicating you are a non-profit organization. Assigning an EIN does not grant tax-exempt status to non-profit organizations. Publication 557, Tax-Exempt Status for Your Organization, has details on the application process, as well as information on returns you may need to file. To apply for recognition of tax-exempt status under Internal Revenue Code Section 501(c)(3), organizations must complete a Form 1023-series application for recognition. All other entities should file Form 1024 if they want to request recognition under Section 501(a).

Nearly all organizations claiming tax-exempt status must file a Form 990-series annual information return (Form 990, 990-EZ, or 990-PF) or notice (Form 990-N) beginning with the year they legally form, even if they have not yet applied for or received recognition of tax-exempt status.

Unless a filing exception applies to you (search [www.irs.gov](http://www.irs.gov) for Annual Exempt Organization Return: Who Must File), you will lose your tax-exempt status if you fail to file a required return or notice for three consecutive years. We start calculating this three-year period from the tax year we assigned the EIN to you. If that first tax year isn't a full twelve months, you're still responsible for submitting a return for that year. If you didn't legally form in the same tax year in which you obtained your EIN, contact us at the phone number or address listed at the top of this letter.

For the most current information on your filing requirements and other important information, visit [www.irs.gov/charities](http://www.irs.gov/charities).

575E

02-04-2021 RACE O 9999999999 SS-4

**IMPORTANT REMINDERS:**

- \* Keep a copy of this notice in your permanent records. **This notice is issued only one time and the IRS will not be able to generate a duplicate copy for you.** You may give a copy of this document to anyone asking for proof of your EIN.
- \* Use this EIN and your name exactly as they appear at the top of this notice on all your federal tax forms.
- \* Refer to this EIN on your tax-related correspondence and documents.
- \* Provide future officers of your organization with a copy of this notice.

Your name control associated with this EIN is RACE. You will need to provide this information, along with your EIN, if you file your returns electronically.

If you have questions about your EIN, you can contact us at the phone number or address listed at the top of this notice. If you write, please tear off the stub at the bottom of this notice and include it with your letter. Thank you for your cooperation.

Keep this part for your records.

CP 575 E (Rev. 7-2007)

Return this part with any correspondence so we may identify your account. Please correct any errors in your name or address.

CP 575 E

99999999999999

Your Telephone Number      Best Time to Call  
(       )                      -

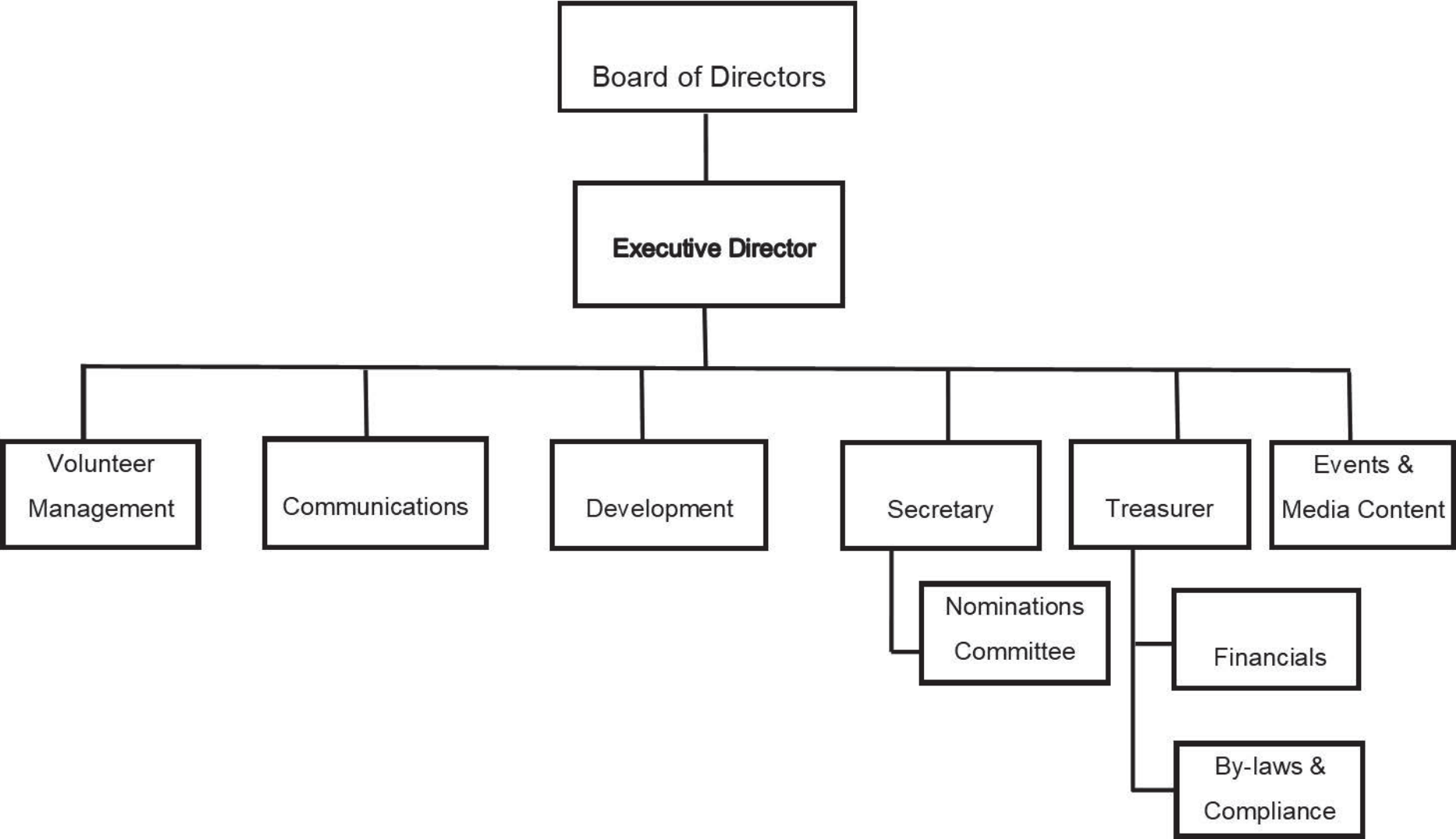
DATE OF THIS NOTICE: 02-04-2021  
EMPLOYER IDENTIFICATION NUMBER: 86-1879181  
FORM: SS-4 NOBOD

INTERNAL REVENUE SERVICE  
CINCINNATI OH 45999-0023

A barcode consisting of vertical bars of varying heights, used for document tracking or identification.

RACE MATTERS SLO COUNTY  
PO BOX 5215  
SN LUIS OBISP, CA 93403

**R.A.C.E. Matters Organizational Chart**





**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

Manager, (ghermann@slocity.org)

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 11/21/2022 | 8:59 AM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Boys & Girls Club (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to the scholarship program as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$10,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

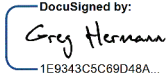
GRANTEE:  
Boys & Girls Club  
Emily Reneau  
901 N Railroad Avenue  
Santa Maria, CA 93458  
Emily.reneau@centralcoastkids.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

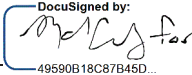
Grantee

By:   
Emily Reneau, Development Manager

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:   
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:   
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION

**Organization Name: \***

Boys & Girls Clubs of Mid Central Coast

**Year Established: \***

1966

**Fiscal Agent, if different than above: \***

N/A

**Tax ID #: \***

952468116

**Document Certifying Federal Tax-Exempt status, if applicable**

IRS Exemption Letter - Dated 9-09-19.pdf

80.33KB

**Name of Executive Director (or highest leadership position)**

Michael Boyer

**Approximate Annual Budget:**

5,628,733

**Major Sources of Funding:**

Grants, membership, individual giving and events

**Mission Statement:**

To enable all young people, especially those who need us most, to reach their full potential as productive, caring, responsible citizens.

**Number of paid staff (full- or part-time):**

38

**Number of volunteers:**

200

**Name of Board President or Chair:**

Nadine Sullivan

**Organizational Leadership Chart \***

Expanded Org Chart BGCMCC.png

1.56MB

**Name of Person completing this Application:**

Emily Reneau

**Organization Mailing Address: \***

Street Address

901 N. Railroad Avenue

Address Line 2

City

Santa Maria

Postal / Zip Code

93458

State / Province / Region

CA

Country

USA

**Phone: \***

805-922-7763

**E-mail: \***

emily.reneau@centralcoastkids.org

**Briefly describe your organization’s mission, primary activities, and operating structures.**

Founded in 1966, the Boys & Girls Clubs of Mid Central Coast (formerly Boys & Girls Clubs of Santa Maria Valley and Boys & Girls Clubs of North SLO County) have been helping kids aged 6–18 create Great Futures. Boys & Girls Clubs of Mid Central Coast provides after-school tutoring, mentoring, and access to healthy activities.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

The Boys & Girls Clubs of Mid Central Coast is located on the Central Coast of California in Santa Barbara and San Luis Obispo Counties. We have 22 club sites in Santa Maria, Guadalupe, Atascadero, Shandon, Creston and Paso Robles and San Luis Obispo.

**PART 2: PROJECT INFORMATION**



**Name of DE&I Project \***

Youth for Unity - The Club at Laguna Middle School

**Est. number of people served through this project: \***

60

**Est. number of SLO CITY RESIDENTS served through this project \***

60

**Total Project Cost: \***

15,000

**AMOUNT OF CITY FUNDING REQUESTED: \***

50,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

The Boys & Girls Clubs of America's (BGCA) Youth for Unity program provides youth and parents with the groundwork that will help them better understand diversity and combat prejudice, bigotry, and discrimination. This program consists of a comprehensive, broad-based set of activities and conversation starters that build the capacity of local Clubs to help members appreciate themselves as unique and special individuals; understand our society's diversity; recognize bias and unfairness, and take personal leadership in confronting bias. Youth for Unity was created to promote three primary youth outcomes: 1. Cultivate individuality: Youth learn to value their individuality, which is the unique combination of qualities that makes them who they are. 2. Build cultural identity: Club members respect the beliefs, traditions and values of the culture they belong to. 3. Appreciate diversity: Young people learn about diverse cultures and groups and begin to appreciate the richness and depth that diversity brings to our society.

The Youth for Unity program uses a weekly schedule that allows youth to learn, practice and apply the skills of self-awareness, empathy, self-advocacy, inclusion and social responsibility learned through the Youth for Unity themes. Following is an sample of weekly activities:

Monday: See What's Special and Unique in Every Individual: We start the week with an activity that lets youth share what makes them unique and special. This will help youth build self-awareness and self-advocacy.

Tuesday: Understand Our Society's Diversity: We build in an activity on Tuesday that allows youth to recognize the similarities and differences they share with their peers. This will help youth build empathy and inclusion.

Wednesday: Recognizing Bias and Unfairness: Wednesday's activity lets youth talk about where they see bias and unfairness in their lives. This will help youth build self-awareness, empathy and inclusion.

Thursday: Take Personal Leadership in Confronting Bias: This leads youth in an activity that allows them to identify ways they can take action against bias and unfairness to make their world a better place. This will help youth build self-advocacy and social responsibility.

Friday: Club Culture Celebration: We end the week with a celebration to honor and recognize the culture(s) of our Club members and their families. This could include a potluck night, an arts exhibit or a workshop for youth and families. Such events can help youth celebrate their own culture and, expose expose them to other cultures. We will engage youth asking for their ideas on cultural celebrations.

#### **Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

The Boys & Girls Clubs has historically served low-income minority youth. Our Laguna Middle School club site is the first one we have opened in the City of San Luis Obispo. It serves the middle school population, a population in itself that is underserved. Laguna Middle school's minority student enrollment is 44% and enrolls 32% economically disadvantaged students.

#### **Describe the equity gaps and community needs this project will address.**

San Luis Coastal School District was eager to put programming in place to confront bullying and cultural awareness issues found at the middle school level and learned the BGCMCC model to be the ideal way to bring a comprehensive program to the Campus. At Boys & Girls Club of Mid Central Coast, we take a stand for the future of our local youth. We condemn any act of racism or discrimination. We stand for safety, health, dignity, and equitable opportunity. We advocate for youth and encourage young people to harness the power of their voice. We believe: All young people should be afforded the guarantee of fair treatment, access, and opportunity. There are historically marginalized underserved and underrepresented populations. Systemic racism has a traumatic impact on young people. Our mission compels us to identify and eliminate barriers that have prevented the full participation and advancement of some groups in this country, particularly Black, Brown, Indigenous, and other persons of color. The essential work that is needed to dismantle oppressive and unjust systems is complex and requires intentional and decisive action nationally, locally and within our own organizations. Addressing systemic injustice cannot be accomplished by a single organization. It is only through a collective effort that we can create a future that is equitable and accessible to all. Black, Latino, Native and other youth of color, and their families and communities, historically have been and still are confronted with racism and its negative impacts. Institutional, or systemic, racism is a structural and systematic practice of creating and denying opportunities, and assigning value, based on race. Boys & Girls Clubs of America is on a journey to help combat racial inequities by dismantling institutional racism within our walls and ensuring that all youth have equal access and opportunity to achieve their dreams. The Youth for Unity Targeted Program and resources support Clubs in creating a more diverse, inclusive and racially equitable environment for youth to grow and thrive.



In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

#### Methods of Evaluation

Example : # of BIPOC serving on public boards, committees

Through National Youth Outcomes Initiatives (NYOI), we are striving to improve accountability and create a data-driven culture, for our Clubs. NYOI measures the impact of Boys & Girls Clubs in a consistent and credible way. We collect data on member demographics, attendance, members' perception of the Club Experience, and how members are doing in terms of our three priority outcome areas of Academic Success, Character and Leadership, and Healthy Lifestyles.

Example : # of BIPOC serving on public boards, committees

50 BIPOC middle school youth achieving academic success

Example : # of BIPOC serving on public boards, committees

10 more BIPOC middle school youth enrolled in the BGCMCC program

#### Indicators of Success / Measurable Outcomes

Example: 10% increase by end of 2021

Boys & Girls Clubs also finds consistently that when members report having an optimal Club Experience, they are more likely to achieve positive outcomes in the priority areas of Academic Success, Character and Leadership, and Healthy Lifestyles. For example, in the area of Academic Success, members who report an optimal Club Experience are 35% more likely to be on track to graduate from high school on time compared to their Club peers who report a Club Experience that needs improvement. Continued exposure to a high-quality Club Experience fosters a love for learning, enabling young people to grow into effective, engaged, and adaptive learners. It builds young people's confidence and competence to motivate, collaborate and lead. And it equips young people with the ability to live positive, healthy decision-makers.

Example: 10% increase by end of 2021

50% increase by the end of 2022

Example: 10% increase by end of 2021

20% increase by the end of 2022

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

#### Name of Partner

Example: ABC Business

San Luis Coastal School District

Example: ABC Business

Laguna Middle School

#### Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes

SLCSD support us in allowing us to run a clubhouse on their site and work with us to insure programming needs are met communicating what is needed to their middle school population.

Example: Free Use of Space for Weekend Classes

Support us in communicating the needs of their student population in addition to allowing us to run a club on their middle school site.

#### Provide the timeline for this proposed project.

The Laguna club site opened in the Spring 2022 and will open again this coming school year. Our plan is to run the program year round for youth out of school hours with programming in the summer. The project has an indefinite end time.

#### Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

We plan to continue to work closely with our schools and educator to ensure that we are informed of the educational needs of our members. We will continue to work as a team in the best interest of our youth. We will continue to work closely with our parents and guardians so they are able to communicate any specific educational needs their child may have that we can help with. We will work to develop a personalized learning program for our members that may need additional help. We are committed to serving nutritious meals and snacks to ensure that our members have the nutrition they need throughout the day to learn. We will continue to consistently train our staff and follow our Formula for Impact. We will continue work with outside organizations that may offer our youth addition resources, Big Brothers Big Sisters, County Health Departments, Social Services, Local colleges, Goodwill Industries, etc. educating them on our stand to condemn any act of racism or discrimination.

PART 3: PROJECT COST / BUDGET

Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Project Personnel	\$ 95,000.00	\$ 15,000.00	\$ 80,000.00
2 Marketing Outreach	\$ 5,000.00	\$ 1,000.00	\$ 4,000.00
3 General & Administrative	\$ 25,000.00	\$ 15,000.00	\$ 10,000.00
4 Scholarships	\$ 15,000.00	\$ 12,000.00	\$ 3,000.00
5 Program supplies & food	\$ 10,000.00	\$ 7,000.00	\$ 3,000.00

\*During application review , you may be asked for further financial information or for proof of any matching funds

PART 4: AWARENESS AND VISIBILITY

Describe the plan for promoting this project within the City of San Luis Obispo.

The Boys & Girls Clubs of Mid Central Coast has strong relationships with our local media. We will be promoting this program through those channels in addition to social media, BGCMCC website and back to school flyers.

How will you highlight the City's support of your project?

The City's support will be mentioned in all avenues listed above with inclusion of the City's logo and the words "The Youth for Unity Program is made possible in part by a grant for the City of San Luis Obispo". We will work closely with the City's DEI department to insure wording is compliant with their needs.

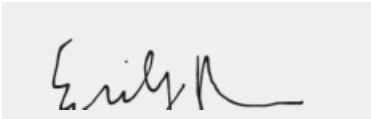
PART 5: CERTIFICATION

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

Name of Person completing this Application: \*

Emily Reneau

Signature \*

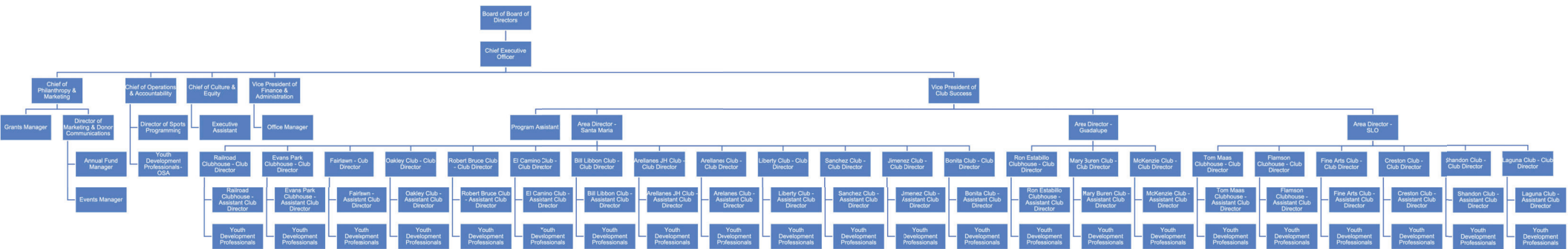


Title: \*

Development Manager

**Date:** \*

8/8/2022





OGDEN UT 84201-0029

In reply refer to: 4077950277  
Sep. 09, 2019 LTR 4168C 0  
95-2468116 000000 00

00027753  
BODC: TE

BOYS & GIRLS CLUB OF THE CENTRAL  
COAST  
901 N RAILROAD AVE  
SANTA MARIA CA 93458-3072

Employer ID number: 95-2468116  
Form 990 required: Yes

Dear Taxpayer:

We're responding to your request dated June 03, 2019, about your tax-exempt status.

We issued you a determination letter in February 1967, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at [www.irs.gov/forms-pubs](http://www.irs.gov/forms-pubs) or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m.,

4077950277  
Sep. 09, 2019 LTR 4168C 0  
95-2468116 000000 00  
00027754

BOYS & GIRLS CLUB OF THE CENTRAL  
COAST  
901 N RAILROAD AVE  
SANTA MARIA CA 93458-3072

local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely yours,

*Stephen A. Martin*

Stephen A. Martin  
Director, EO Rulings & Agreements

**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)



**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/5/2022 | 1:50 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Independent Living Resource Center, INC (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to the training program as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$7,668, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:


CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

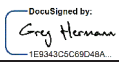
GRANTEE:  
Independent Living Resource Center, INC  
Alexa Martin  
423 W. Victoria St  
Santa Barbara, CA 93101  
amartin@ilrc-trico.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
Alexa Martin, Program Director

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION



**Organization Name:** \*

Independent Living Resource Center, Inc

**Year Established:** \*

1976

**Fiscal Agent, if different than above:** \*

N/A

**Tax ID #:** \*

953255012

**Document Certifying Federal Tax-Exempt status, if applicable**

501(c)(3) Letter.pdf

1.15MB

**Name of Executive Director (or highest leadership position)**

Jennifer Griffin

**Approximate Annual Budget:**

1,922,726

**Major Sources of Funding:**

State and Federal Grants

**Mission Statement:**

The mission of the Independent Living Resource Center is to promote independent living and full access for individuals with disabilities through advocacy, education, and action in our communities.

**Number of paid staff (full- or part-time):**

24

**Number of volunteers:**

10

**Name of Board President or Chair:**

Elizabeth Sorgman

**Organizational Leadership Chart** \*

ILRC Leadership Org Chart.docx

50.58KB

**Name of Person completing this Application:**

Alexa Martin

**Organization Mailing Address: \***

Street Address

423 W Victoria St

Address Line 2

City

Santa Barbara

State / Province / Region

CA

Postal / Zip Code

93101

Country

USA

**Phone: \***

8059630595

**E-mail: \***

amartin@ilrc-trico.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

The Independent Living Resource Center, Inc (ILRC) is a disability service and advocacy non-profit organization headquartered in Santa Barbara for the last 46 years, with offices throughout the tri-counties (San Luis Obispo, Santa Barbara, and Ventura Counties). We work with individuals experiencing all disabilities of all ages and income levels to achieve their independence goals with an overarching lifework of keeping individuals with disabilities from being isolated. We do this by providing resources, assistance, and targeted programs to help with all details of independence, such as: navigating access to affordable/accessible housing, benefits counseling, transportation, deaf and hard of hearing services, interpreter services, transition services, personal assistance, assistive technology, disaster preparedness, peer support, and so much more. We also work to create systemic change in our community, especially around accessibility and disability culture. Approximately 80% of ILRC's staff and board identify as persons with disabilities.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

ILRC provides services to people with all disability types, of all ages, races/ethnicities, genders, income levels, housing status, employment status, etc., in San Luis Obispo, Santa Barbara, and Ventura Counties. Disability is the largest minority group in the world and intersects with all other identities. ILRC staff are trained in best practices to provide services to all underserved populations effectively. Our only service eligibility requirement is that the individual must identify as a person with a disability, can benefit from the services we offer, and that individual will actively participate in achieving their goals.

**PART 2: PROJECT INFORMATION****Name of DE&I Project \***

Disability Access and Communication

**Est. number of people served through this project: \***

160

**Est. number of SLO CITY RESIDENTS served through this project \***

All residents in the City of SLO will benefit from this project.

**Total Project Cost: \***

12,395

**AMOUNT OF CITY FUNDING REQUESTED: \***

7,668

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

Disability is the largest minority group in the world and can be engendered at birth, catalyzed with age, the result of an accident, or temporary. The Americans with Disabilities Act (ADA) of 1990 paved the way for increased accessibility in public spaces. However, individuals with disabilities continue to advocate to break down systemic barriers from a physical and cultural perspective; the ADA is just a baseline. Through this project, we aim to amplify the voice of a community often disenfranchised by providing education and awareness around access and barriers the disability community continues to encounter daily.

The Independent Living Resource Center, Inc is requesting funds to further develop our systems change initiative, Disability Access and Communication. This initiative trains local businesses, event spaces, and community groups on best practices for accessible space, disability communication, and cultural competency. Training will be held 7 times in one fiscal year. They will be tailored to the individual space and/or group and offer first-hand perspectives from presenters living with different disabilities themselves. Training will be led by ILRC's Systems Change Coordinator and developed with our consumers with lived experience who will speak about obstacles they face in navigating similar environments. Perspectives shared will include those with physical disabilities, low vision/blindness, deafness, invisible disabilities, and more.

In addition to training development and resource materials, funds will be utilized to advertise this training within the San Luis Obispo community. Funds will provide stipends for consumer presenters and cover travel costs for presenters and ILRC staff participating in this training.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

This project will increase accessibility and awareness of disability communication and culture in the City of San Luis Obispo and will benefit all individuals with disabilities within the City. ILRC will seek out opportunities to train staff of frequented public spaces, such as entertainment venues, and will hold open training for other community groups and businesses interested in the training. Training for specific entities will be held at their location, and open training will be held at an accessible public space in a centralized location near public transit and parking. ILRC's Systems Change Coordinator will provide self-advocacy training to individuals with disabilities in the community who will utilize skills gained to minimize equity gaps in the community

**Describe the equity gaps and community needs this project will address.**

The Disability Access and Communication project will address accessibility gaps experienced by those with disabilities and offer practical solutions through shared experiences and cultural competency training to help understand interdependent factors better. This project will increase inclusion and access for individuals with disabilities in the City of San Luis Obispo.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

**Methods of Evaluation**

Example : # of BIFOC serving on public boards, committees

# of groups presented to

**Indicators of Success / Measurable Outcomes**

Example: 10% increase by end of 2021

# of groups who implemented/adopted suggestions from the training

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

**Name of Partner**

Example: ABC Business

**Activity/Service They Provide for This Project**

Example: Free Use of Space for Weekend Classes

**Provide the timeline for this proposed project.**

ILRC will prioritize outreach and material development during the first two months of this project, with the first training taking place during the final month of the first quarter. For the remainder of the grant year, we will host 2 training events per quarter.

**Describe your plan for sustainability beyond the City's one-year award funding, if applicable.**

ILRC is seeking this funding as an extension of a project that has proven to be efficacious in the Santa Barbara Community, funded by a local foundation. ILRC will prioritize funding opportunities to support this project and leverage local foundation funds to sustain funding beyond the one-year award.

**PART 3: PROJECT COST / BUDGET**



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

	Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1	Systems Change Coordinator Salary	\$ 2,375.00	\$ 2,375.00	\$ 0.00
2	Program Services Manager Salary	\$ 4,727.00	\$ 0.00	\$ 4,727.00
3	Access Accommodations	\$ 1,000.00	\$ 1,000.00	\$ 0.00
4	Mileage/Travel	\$ 293.00	\$ 293.00	\$ 0.00
5	Training Space	\$ 1,500.00	\$ 1,500.00	\$ 0.00
6	Supplies	\$ 500.00	\$ 500.00	\$ 0.00
7	Presenter Stipends	\$ 2,000.00	\$ 2,000.00	\$ 0.00

\*During application review , you may be asked for further financial information or for proof of any matching funds

**PART 4: AWARENESS AND VISIBILITY**



**Describe the plan for promoting this project within the City of San Luis Obispo.**

ILRC's robust marketing plan utilizes social media, email, in-person outreach, local media ILRC's robust marketing plan utilizes social media, email, in-person outreach, local media advertisement, a monthly newsletter, and presentations. All staff will incorporate information on this project into their regular outreach practices to further share information. ILRC will advertise this project through our listserv, which has a reach of approximately 1,850 individuals and will include it in the regular monthly newsletter. ILRC has strong relationships with many community-based organizations in the City of San Luis Obispo, whom we will incorporate into our outreach efforts. ILRC will conduct targeted outreach to event spaces and places of gathering.

**How will you highlight the City's support of your project?**

Through the outreach process outlined above, ILRC will highlight the City of San Luis Obispo for its support of increasing access and cultural competency for the disability community by funding this project. This will be highlighted in all social media posts, emails, local media advertisements, listserv communication, and during the training itself.

**PART 5: CERTIFICATION**



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person completing this Application: \***

Alexa Martin

**Signature \***



Alexa Martin

Title: \*

Program Director

Date: \*

8/31/2022

**Internal Revenue Service**

**Department of the Treasury**

**P. O. Box 2508  
Cincinnati, OH 45201**

**Date:** February 12, 2003

**Person to Contact:**  
John Kennedy ID 31-07297  
Customer Service Representative

**Toll Free Telephone Number:**  
8:00 a.m. to 6:30 p.m. EST  
877-829-5500

**Fax Number:**  
513-263-3756

**Federal Identification Number:**  
95-3255012

Independent Living Resource Center, Inc.  
423 W. Victoria  
Santa Barbara, CA 93101

Dear Sir or Madam:

This is in response to your request of February 12, 2003, regarding your organization's tax exempt status.

Our records indicate that a determination letter issued in July 1978, granted your organization exemption from federal income tax under section 501(c)(3) of the Internal Revenue Code. That letter is still in effect.

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.

-2-

Independent Living Resource Center, Inc.  
95-3255012

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.

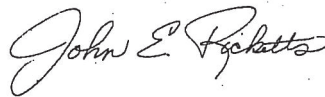
The law requires you to make your organization's annual return available for public inspection without charge for three years after the due date of the return. If your organization had a copy of its application for recognition of exemption on July 15, 1987, it is also required to make available for public 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. You can charge only a reasonable fee for reproduction and actual postage costs for the copied materials. The law does not require you to provide copies of public inspection documents that are widely available, such as by posting them on the Internet (World Wide Web). You may be liable for a penalty of \$20 a day for each day you do not make these documents available for public inspection (up to a maximum of \$10,000 in the case of an annual return).

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.

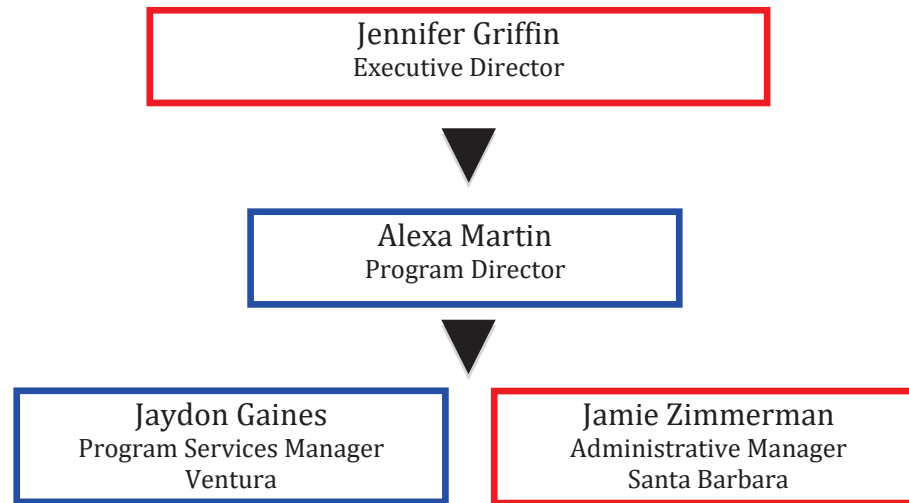
This letter affirms your organization's exempt status.

Sincerely,



John E. Ricketts, Director, TE/GE  
Customer Account Services

**Board of Directors**  
**Elizabeth Sorgman, President**  
**Jim Marston, Vice President**  
**Vacant, Secretary**  
**Eric Rowan, Treasurer**  
**Kit McMillion, Member**  
**Nick Koonce, Member**  
**Ericka Dixon, Member**



**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

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**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**Certificate Of Completion**

Envelope Id: 0CD64E4D49BF4D1EAD723013489D0EDB

Status: Completed

Subject: Complete with DocuSign: Final- Independent Living Resource Center, INC Combined Application Agr...

Department:

Supplier:

Source Envelope:

Document Pages: 12

Signatures: 3

Envelope Originator:

Certificate Pages: 5

Initials: 0

Daniel Clancy

AutoNav: Enabled

990 Palm Street

Enveloped Stamping: Enabled

San Luis Obispo, CA 93422

Time Zone: (UTC-08:00) Pacific Time (US &amp; Canada)

dclancy@slocity.org

IP Address: 50.192.209.57

**Record Tracking**

Status: Original

Holder: Daniel Clancy

Location: DocuSign

11/21/2022 2:07:57 PM

dclancy@slocity.org

**Signer Events**

Alexa Martin

amartin@ilrc-trico.org

Program Director- ILRC

Security Level: Email, Account Authentication  
(None)**Signature**DocuSigned by:  
*Alexa Martin*  
A08813EE43E64B5...

Signature Adoption: Pre-selected Style

Using IP Address: 76.80.169.142

**Timestamp**

Sent: 11/21/2022 2:11:10 PM

Viewed: 11/28/2022 12:31:38 PM

Signed: 11/28/2022 12:33:42 PM

**Electronic Record and Signature Disclosure:**

Accepted: 11/28/2022 12:31:38 PM

ID: 4da1d6f4-e543-4c03-9723-edbe91fde8fa

Mark Amberg for Christine Dietrick

mamberg@slocity.org

Assistant City Attorney

Security Level: Email, Account Authentication  
(None)DocuSigned by:  
*Mark Amberg for Christine Dietrick*  
49590B18C87B45D...

Signature Adoption: Pre-selected Style

Using IP Address: 104.129.198.252

Sent: 11/28/2022 12:33:45 PM

Viewed: 11/28/2022 2:24:54 PM

Signed: 11/28/2022 2:25:12 PM

**Electronic Record and Signature Disclosure:**

Accepted: 11/28/2022 2:24:54 PM

ID: c543c798-7b11-4307-b3df-a09f6a913cf3

Greg Hermann

ghermann@slocity.org

Deputy City Manager

Security Level: Email, Account Authentication  
(None)DocuSigned by:  
*Greg Hermann*  
1E9343C5C69D48A...

Signature Adoption: Pre-selected Style

Using IP Address: 104.129.202.83

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Viewed: 12/5/2022 1:50:16 PM

Signed: 12/5/2022 1:50:30 PM

**Electronic Record and Signature Disclosure:**

Accepted: 12/5/2022 1:50:16 PM

ID: d36693e7-8cdb-4551-aeb1-a32653e941af

**In Person Signer Events****Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp**



Certified Delivery Events	Status	Timestamp
<b>Carbon Copy Events</b>		
Alexa Martin amartin@ilrc-trico.org Program Director- ILRC Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 11/28/2022 12:31:38 PM ID: 4da1d6f4-e543-4c03-9723-edbe91fde8fa	COPIED	Sent: 12/5/2022 1:50:32 PM
Matt Melendrez mmelendr@slocity.org Security Level: Email, Account Authentication (None) <b>Electronic Record and Signature Disclosure:</b> Accepted: 12/14/2022 6:19:31 PM ID: 02a0a1c7-8b1f-4f3e-a5f6-f78190bef4bc	COPIED	Sent: 12/5/2022 1:50:33 PM Viewed: 1/12/2023 3:08:16 PM
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
<b>Envelope Summary Events</b>		
Envelope Sent	Hashed/Encrypted	11/21/2022 2:11:10 PM
Certified Delivered	Security Checked	12/5/2022 1:50:16 PM
Signing Complete	Security Checked	12/5/2022 1:50:30 PM
Completed	Security Checked	12/5/2022 1:50:33 PM
Payment Events	Status	Timestamps
<b>Electronic Record and Signature Disclosure</b>		

## **ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

From time to time, Carahsoft OBO City of San Luis Obispo (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through your DocuSign, Inc. (DocuSign) Express user account. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

### **Getting paper copies**

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You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: [keriksso@slocity.org](mailto:keriksso@slocity.org)

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To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address..

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**To request paper copies from Carahsoft OBO City of San Luis Obispo**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.

**To withdraw your consent with Carahsoft OBO City of San Luis Obispo**

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your DocuSign account, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an e-mail to [keriksso@slocity.org](mailto:keriksso@slocity.org) and in the body of such request you must state your e-mail, full name, US Postal Address, telephone number, and account number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

**Required hardware and software**

Operating Systems:	Windows2000? or WindowsXP?
Browsers (for SENDERS):	Internet Explorer 6.0? or above
Browsers (for SIGNERS):	Internet Explorer 6.0?, Mozilla FireFox 1.0, NetScape 7.2 (or above)
Email:	Access to a valid email account
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	<ul style="list-style-type: none"><li>•Allow per session cookies</li><li>•Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection</li></ul>

\*\* These minimum requirements are subject to change. If these requirements change, we will provide you with an email message at the email address we have on file for you at that time providing you with the revised hardware and software requirements, at which time you will have the right to withdraw your consent.

**Acknowledging your access and consent to receive materials electronically**

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

By checking the 'I Agree' box, I confirm that:

- I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC RECORD AND SIGNATURE DISCLOSURES document; and
- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Carahsoft OBO City of San Luis Obispo as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by Carahsoft OBO City of San Luis Obispo during the course of my relationship with you.

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/1/2022 | 11:46 AM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and SLO Noor Foundation (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to Whole Community Care (WCC) Project as submitted in its application to the CITY on August 31, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$13,050, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

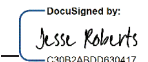
City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

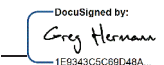
SLO Noor Foundation  
1428 Phillips Lane  
Suite 203  
San Luis Obispo, CA 93401  
rbrogdon@slonoorfoundation.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
C30B2ABDD630417...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E9343C6C89D48A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
49590B18C67B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION

**Organization Name:** \*

SLO Noor Foundation

**Year Established:** \*

2010

**Fiscal Agent, if different than above:** \*

N/A

**Tax ID #:** \*

271412176

**Document Certifying Federal Tax-Exempt status, if applicable**

**Name of Executive Director (or highest leadership position)**

David Parro

**Approximate Annual Budget:**

869,920

**Major Sources of Funding:**

Public grants (29%); private grants (28%); individual donations (43%).

**Mission Statement:**

The SLO Noor Foundation's mission is to provide free medical, dental, and vision care to uninsured adults in San Luis Obispo County and northern Santa Barbara County regardless of race, ethnicity, immigration status, religion, sexual orientation, or gender. The SLO Noor Foundation is committed to advancing diversity and inclusion by helping ensure that all people across the community feel valued and have equal access to resources, services, and opportunities provided by SLO Noor Health Clinics.

**Number of paid staff (full- or part-time):**

13

**Number of volunteers:**

87

**Name of Board President or Chair:**

James Schoolis

**Organizational Leadership Chart** \*

2022\_organizational\_chart.pdf

929.63KB

**Name of Person completing this Application:**



Rebecca Brogdon

**Organization Mailing Address: \***

Street Address

1428 Phillips Lane

Address Line 2

Suite 203

City

San Luis Obispo

Postal / Zip Code

93401

State / Province / Region

CA

Country

US

**Phone: \***

(805) 439-1797

**E-mail: \***

rbrogdon@slonoorfoundation.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

Gaining 501(c)3 status in 2010, the SLO Noor Foundation (SLONF) is a HRSA-recognized free clinic and safety-net organization with a mission to provide free medical, dental, and vision care to uninsured adults in San Luis Obispo and northern Santa Barbara Counties, regardless of race, ethnicity, religion, gender, sexual orientation, or immigration status. The SLONF is committed to advancing diversity and inclusion by helping ensure that all people across the community feel valued and have equal access to resources, services, and opportunities provided by SLO Noor Health Clinics.

Beginning as a single part-time medical clinic, the SLONF has evolved into a multidisciplinary, volunteer-based healthcare organization that operates two clinic sites in San Luis Obispo in addition to managing a full-time Telehealth Care and Virtual Support Program and the part-time Women and Infants Mobile Health Unit, which serves women in northern Santa Barbara County through a partnership with the Cal Poly Health Research Center. In 2021, the SLONF was successful in serving 1,641 patients over 3,852 encounters and 14,597 diagnostics, offering the following health and support services in both English and Spanish: primary and specialty care, including dermatology, podiatry, cardiology, neurology, womens' health, and physical rehab services; transdisciplinary screenings and referrals (ie: ophthalmology care for type-2 diabetics); laboratory and radiology diagnostics; medication prescription and refills; chronic condition health management; COVID-19 risk and vaccine education; telehealthcare and virtual support; lifestyle and nutrition consultations; mental health screenings, counseling, and counseling referrals; preventive and restorative dental care; oral surgery and rehabilitation; comprehensive eye exams and eyeglass prescription; affordable prescription assistance, and; social support and community referrals.

In response to the late impacts of the COVID-19 pandemic, the SLONF also formed the following new or expanded programs in 2021: (1) expanded, full-time telehealthcare and virtual support services, including certain specialty care (ie: nutrition) meant to expand access within rural communities and individuals without transportation, childcare, workplace accommodations, etc.; (2) mental health screenings, counseling, and counseling referrals, integrating mental healthcare into a primary care setting to reduce stigmatization and improve awareness and access to mental health resources; (3) COVID-19 vaccine health education and single-day vaccine administration clinics, focusing on hard-to-reach populations, such as Spanish-speaking communities, and; (4) Medi-Cal enrollment support and Medi-Cal provider referrals, which are offered in order to ensure Medi-Cal-eligible community members can receive coverage and to help ensure that SLO Noor Health Clinics services are provided to uninsured community members who are ineligible for Medi-Cal.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

The SLONF primarily operates in San Luis Obispo County with 74.5% of SLONF patients residing in the County, and 24.5% residing in the City of San Luis Obispo. Since opening in 2010, the SLONF has prioritized the delivery of health and support services to communities in greatest need, gaining trust and recognition within underserved and hard-to-reach populations. A majority of SLONF patients are from BIPOC, non-English-speaking (Hispanic), and low-income communities. Over the last several years, SLO Noor Health Clinics have served a patient base and target population that is increasingly represented by these populations. In response, the SLONF has developed services based on clinical findings and engaging in community partnerships in order to better reach and serve these communities.

Of these developments, the SLONF has formed the following policies meant to improve the accessibility and inclusivity of its programs: free provision of diagnostics and healthcare to patients regardless of race, ethnicity, religion, immigration status, sexual orientation, or gender; provision of treatment, health education, and community referrals with consideration of individual patient cultural and socioeconomic background; provision of interpretation services; delivery of care in-clinic or virtually via video or phone and the planned future option to receive care at a mobile health clinic as part of the proposed project; delivery of social support services, including planned care coordination services, which will directly connect patients with internal and external social services to meet their Social Determinants of Health (SDoH) needs, as part of the proposed project.

## PART 2: PROJECT INFORMATION



### Name of DE&I Project \*

Whole Community Care (WCC) Project

### Est. number of people served through this project: \*

1700

### Est. number of SLO CITY RESIDENTS served through this project \*

415

### Total Project Cost: \*

158,178

### AMOUNT OF CITY FUNDING REQUESTED: \*

27,350

### Describe your proposed project or program.

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

Over the last several years, the SLONF has focused on determining the medical and social needs of both its patient base and its target population using clinical data and external research as resources to drive its development efforts. Based on these findings, the following three (3) diversity, equity, and inclusion (DEI) development areas were determined: (1) healthcare accessibility; (2) patient noncompliance and resource connectivity, and; (3) equitable clinical practices. In response, the SLONF developed an initiative titled the Whole Community Care (WCC) project, which will first target healthcare accessibility affecting the low-income communities and hard-to-reach populations through the purchase and operation of a mobile health unit (MHU). Through the proposed project, the SLONF will build upon the initial activities introduced in the WCC project and address the remaining two (2) DEI needs areas (patient noncompliance and equitable clinical practices) in an effort to form accessible practices that are inclusive to Hispanic, BIPOC, and LGBTQ communities.

As part of the proposed project, the SLONF intends to introduce the following clinical services in order to accommodate a greater and more diverse patient base: (1) delivery of multilingual healthcare at the SLO Noor Free Medical Clinic and the planned SLO Noor Free Mobile Clinic; (2) delivery of care coordination services that directly connect patients with internal programs and trusted external resources addressing SDoH; (3) partnership with organizations serving Hispanic, BIPOC, and LGBTQ communities that will include DEI strategization, referral systems, outreach, and partner networking; (4) workforce training with an emphasis on cultural competence and implicit bias toward Hispanic, BIPOC, and LGBTQ communities, and; (5) updates to clinical practices with concerns to equity (ie: updating intake forms and data collection). To execute this project effectively, the SLONF requests funding in the amount of \$27,350 in

order to afford the following necessary expenses: (1) \$13,000 toward key staff personnel, including the SLONF's 1.0 FTE Medical Clinic Manager, 1.6 FTE Bilingual Medical Assistants, and 0.3 FTE Mobile Clinic Medical Assistant; (2) \$13,050 toward clinical diagnostics and supplies, necessary to adequately support established patients with or at risk of high-risk chronic conditions and to onboard new patients as a crucial first step in assessing the health of at-risk populations, and; (3) \$1,300 toward indirect expenses, which include administrative staffing, facility rental, and related expenses necessary to house and operate the program.

Of requested funding, \$14,500 or 50% of funding will be applied toward key personnel who will coordinate and schedule patients, providers, and volunteers, and also collectively supervise and execute proposed project activities. Because the proposed project requires the implementation of both updated healthcare practices and workforce training for 95 staff members and volunteers, the SLONF will apply \$7,500 toward SLONF's Medical Clinic Manager salary to oversee this implementation. Through the WCC project, the SLONF will coordinate with community partners such as The Center for Family Strengthening's Promotores Collaborative and the Gala Pride & Diversity Center, who will offer consultation and provide training with regards to DEI in healthcare intake and delivery. These consultations and trainings will inform clinical practices and data collection protocols, which will be updated and monitored by the SLONF's Medical Clinic Manager, who will evaluate the success of these updates over the grant cycle.

By the first half of the grant cycle, the SLONF intends to have these updates in place, which requires the support of the SLONF's bilingual Medical Assistants and Mobile Clinic Medical Assistant. Together, the SLONF's Medical Assistants will assist new and established patients in the updated intake process in addition to providing interpretation services, offering volunteer provider support, scheduling patients in-clinic and offsite (ie: at SLO Noor Free Mobile Clinic sites), processing internal and community referrals, submitting diagnostics orders, and delivering health education and care coordination services. As mentioned, the SLONF has identified patient noncompliance as a clinical development area, where clinic patients and community members in general are often unable to secure resources within the community due to larger issues regarding accessibility and inclusivity. Oftentimes, patients from Hispanic, BIPOC, and/or LGBTQ backgrounds experience significant medical and institutional mistrust, specifically within the trans community (Bazargan et al, 2021; Medina et al, 2021). Likewise, the SLONF will often submit diagnostics orders and community referrals multiple times before a patient actually receives these services. The compliance rate is even lower for SDoH referrals. In response to these issues, the SLONF will introduce limited care coordination services, through which SLONF Medical Assistants at physical and mobile clinic sites will discuss referral options in order to alleviate mistrust and assist patients in contacting outside organizations, building referral and outreach systems with key partners to increase accessibility between the bases of each organization.

As the SLONF builds community partnerships, additional efforts to network through these organizations are intended to increase representation of Hispanic, BIPOC, and LGBTQ communities within the SLONF's patient base. It is the goal of the SLONF to increase representation within these populations, particularly through the enrollment of new patients. As part of the proposed project, \$13,050 or 45% of funding will afford direct operational expenses necessary to deliver diagnostics and healthcare to new and established patients from Hispanic, BIPOC, and LGBTQ communities. Of these expenses, the SLONF will afford the delivery of diagnostics both onsite and outsourced to local diagnostics facilities, with which the SLONF maintains close partnerships and significant discounts on laboratory and radiology diagnostic services. Through these discounts, the SLONF can afford these diagnostic services on behalf of its patients, reducing noncompliance caused by a patient's inability to afford out-of-pocket costs. The SLONF intends to support its established patient base while enrolling new patients through the WCC project expansion and recognizes that it is a crucial first step to provide diagnostic services in assessing health status of new patients from at-risk backgrounds and assigning appropriate treatment.

Through these project activities, the SLONF intends to better reach and serve community members from Hispanic, BIPOC, and LGBTQ communities. As a result of these activities, the SLONF will achieve the following outcomes: (1) serve at least 450 SLO City patients from Hispanic, BIPOC, and/or LGBTQ communities with over 30% being new during the grant cycle; (2) track and increase the representation of Hispanic, BIPOC, and/or LGBTQ communities within its patient base; (3) track and increase the referral rate from key partners, including but not limited to the Pride Center and the Promotores Collaborative, and; (4) assess and increase healthcare intake and delivery practices at SLO Noor Health Clinics.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

Based on its internal findings and outside research, the SLONF intends to serve the following communities with funding requested through the City of San Luis Obispo DEI program: Hispanic or Latinx communities, which make up 38% of the population in the SLONF's service area; BIPOC communities making up 49% of the population, and; LGBTQ communities, making up 5% of the population (Movement Advancement Project, n.d.; Pew Research Center, 2022; U.S. Census Bureau, n.d.). Historically, the SLONF has provided healthcare and support services to underserved and at-risk communities across San Luis Obispo and northern Santa Barbara Counties, where in 2021, 86% of the SLONF's patient base was BIPOC, 83% non-English-speaking, and 91% low-income (at or below 200% of the Federal Poverty Level).

First launched from a medical clinic site in San Luis Obispo, the SLONF now operates from two physical clinic sites in San Luis Obispo as well as a mobile health unit, which serves the Santa Maria Valley, operated in partnership with the Cal Poly Health Research Center. As part of the WCC project, a future expansion planned for early 2023 will be a mobile health unit, solely owned and operated by the SLONF in order to serve low-income communities and hard-to-reach populations in San Luis Obispo County. Through the proposed project, the SLONF will operate on three levels in order to reach and support target populations: (1) public outreach, including offsite scheduling, conducted through key partner networking and engagements; (2) infrastructure evaluation and updates, including consultations to update healthcare practices and trainings to inform clinical staff and volunteers, and; (3) healthcare and care coordination services, including diagnostics, treatment, and community referral assistance delivered at both physical and mobile clinic sites.

Currently, the SLONF tracks certain demographic (age, race, ethnicity, language) and SDoH (food access, housing status, and employment) information, and through the proposed project, the SLONF will begin tracking the following metrics: gender (self-identifying), sexual orientation (self-identifying), and referral source (to assess project partner engagement). Altogether, these metrics are meant to serve as an assessment of grant progress as well as a foundation for future program development that will be tracked during and following the grant cycle.

**Describe the equity gaps and community needs this project will address.**

As mentioned, the SLONF has determined the following three (3) DEI development areas based on internal and external findings: (1) healthcare accessibility; (2) patient noncompliance, and; (3) equitable clinical practices.

Of these development areas, healthcare accessibility has been determined as one of the leading causes of healthcare inequity by the County of SLO Department of Public Health, whose 2018-23 Community Health Assessment report determined that limitations in the locations, availability, and inclusivity of healthcare practices are creating barriers to care that affect underserved and underrepresented populations. Because of socioeconomic and cultural differences (e.g., language) as well as time, technology, and travel obstacles, these communities often forgo care or lack the resources and capacity to schedule and attend healthcare appointments (San Luis Obispo County Department of Public Health, 2018). In response, the SLONF has organized several initiatives to address these inequities in healthcare accessibility, including care coordination and mobile health initiatives introduced through the WCC project. Through the WCC project, the SLONF also intends to address the remaining two development areas: patient noncompliance and equitable clinical practices, which in addition to healthcare access barriers, is influenced by medical and institutional mistrust. Historically, the SLONF has served a majorly Hispanic and BIPOC patient population, in part due to the Medicare ineligibility and medical and institutional mistrust within these communities. Over time, the SLONF has gained the recognition and the reach necessary to establish connections and determine the needs of these communities, creating a healthcare home for community members who would otherwise go without care. Due to systemic and intrapersonal racism and prejudice faced by Hispanic and BIPOC populations, individuals from these communities often experience higher levels of medical and institutional mistrust, which are associated with lower healthcare access, health literacy levels, and chronic disease control (Tsai et al, 2018, Armstrong et al, 2006). Although the SLONF enrolls and retains new patients from underserved populations, SLO Noor Health Clinics experience low rates of patient compliance to outsourced referrals, such as diagnostics orders and community referrals addressing SDoH.

Similarly, individuals from the LGBTQ community experience higher levels of medical mistrust and healthcare discrimination, resulting in poorer healthcare access and health outcomes (Mirza and Rooney, 2018). Due to these shortcomings in healthcare, the SLONF has formed activities within the WCC project in order to improve health equity and inclusivity within its internal policies and practices. Of these efforts, the SLONF will provide implicit bias trainings to clinical staff and volunteers, restructure intake and data collection processes, offer interpretation services at an expanded capacity, and begin offering limited referral assistance and care coordination services, with an emphasis in improving accessibility and establishing trust between patients and outside organizations.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIPOC serving on public boards, committees Unique patient and patient encounters of Hispanic, BIPOC, and/or LGBTQ patients.	Example: 10% increase by end of 2021 At least 30% new Hispanic, BIPOC, and/or LGBTQ patients.
Example : # of BIPOC serving on public boards, committees Diagnostics for Hispanic, BIPOC, and/or LGBTQ populations.	Example: 10% increase by end of 2021 At least 50% of Hispanic, BIPOC, and/or LGBTQ patients experience positive health outcomes (ie: decrease in HbA1c in patients with type-2 diabetes).
Example : # of BIPOC serving on public boards, committees Referral rate to and from key partners (PRIDE Center and Promotores Collaborative).	Example: 10% increase by end of 2021 At least 10% increase in referrals to and from key partners.
Example : # of BIPOC serving on public boards, committees Implicit bias trainings for clinical staff and volunteers.	Example: 10% increase by end of 2021 Reported increase in Hispanic, BIPOC, and/or LGBTQ representation in patient base.

In the chart below, identify any partnerships/collaborations that are supporting this

project, and their roles.

Name of Partner

Example: ABC Business

PRIDE Center

Example: ABC Business

Promotores Collaborative

Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes

Consultation and training.

Example: Free Use of Space for Weekend Classes

Outreach and referrals.

Provide the timeline for this proposed project.

During the first half of the grant cycle, the SLONF intends to establish community partnerships and referral and outreach systems with key partners, which include but are not limited to the Gala Pride & Diversity Center and The Family for Family Strengthening’s Promotores Collaborative. Through these partnerships, the SLONF will update intake and data collection protocols to reflect inclusive practices in addition to organizing DEI workforce training that will be provided to clinical staff and volunteers. By the second half of the grant cycle, the SLONF will have protocols for care coordination, including systems for enrolling patients in SDoH programs of trusted organizations and methods for tracking referral sources at SLO Noor Health Clinics. Over the course of the grant cycle, the SLONF will deliver healthcare and support services as well as care coordination services to target populations at an increasing rate. By the end of the grant cycle, the SLONF will evaluate newly established protocols and practices in order to determine future areas of development with concerns to DEI.

Describe your plan for sustainability beyond the City’s one-year award funding, if applicable.

Of the proposed project, the following activities will be funded by one-time expenses requiring limited to no renewal: community partnership and referral and outreach system development; DEI workforce trainings, and; DEI healthcare practice assessment and updates. Both the healthcare delivery and care coordination activities are meant to be offered on an ongoing basis to both new and established patients. Funding for these activities is contingent upon grant funding and individual donations, and as a result, the SLONF focuses its development efforts on sustainable and effective programs. Of these programs, the SLONF most recently planned the SLO Noor Free Mobile Clinic expansion, which due to its high mobility, will be highly sustainable, able to reach a wide scope of geographical and service focus areas.

By using the City’s one-year award to build upon its clinical practices and data collection policies, the SLONF intends to apply information gained through the funded program to further its future development. Combined with the additional mobility of the SLO Noor Free Mobile Clinic, the SLONF intends to determine the greatest areas of need and deliver healthcare directly within Hispanic, BIPOC, and LGBTQ communities, which will open the SLONF to funding opportunities previously unavailable due to geographical and service limitations.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Personnel (Medical Clinic Manager, Medical Assistants)	\$ 73,216.00	\$ 13,000.00	\$ 60,216.00
2 Outsourced Diagnostics	\$ 44,400.00	\$ 8,050.00	\$ 36,350.00
3 Clinical Supplies	\$ 33,240.00	\$ 5,000.00	\$ 28,240.00

<b>4</b>	Indirect Operating Expenses	\$ 7,322.00	\$ 1,300.00	\$ 6,022.00
	(Administrative Support Staff, Facility Rental, Utilities/Internet/Phone, Insurance, etc.)			

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY

### Describe the plan for promoting this project within the City of San Luis Obispo.

As mentioned, a key component of the proposed WCC project is the partnership with organizations serving Hispanic, BIPOC, and/or LGBTQ communities. Due to the higher levels of medical and institutional mistrust, the SLONF will network with trusted organizations within the City of San Luis Obispo and establish referral and outreach systems through which the SLONF's patient base and target populations will have ready access to SLO Noor Health Clinics and partner organization programs. As a preliminary step, the SLONF has begun successful discussions with the Gala Pride & Diversity Center and the Promotores Collaborative in order to build effective and mutually beneficial partnerships.

Furthermore, the SLONF has begun to seek outreach funding through several opportunities, and intends to incorporate multilingual television/radio advertising, social media campaigning, and print marketing into the public awareness efforts of the WCC project. If awarded, the SLONF will report on the status of outreach funding and subsequent activities over the grant cycle.

### How will you highlight the City's support of your project?

If awarded, the SLONF will publish the City's award on social media profiles, including LinkedIn and Facebook pages. In addition, the SLONF will list the City of SLO as a sponsor on its website and on publications regarding the WCC project.

## PART 5: CERTIFICATION

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Rebecca BRogdon

### Signature \*



### Title: \*

Grants Manager

### Date: \*

8/31/2022



**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 11/21/2022 | 9:06 AM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Central Coast Ag Network, dba City Farm SLO (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to the capital project as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$20,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager


GRANTEE:  
Central Coast Ag Network dba City Farm SLO  
Kayla Rutland  
PO Box 3736  
San Luis Obispo, CA 93403  
kayla@cityfarmslo.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
71BA250DA2B340A...

Kayla Rutland, Executive Director  
CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E9343C5C8B04BA...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
49590B18C87B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION

**Organization Name:** \*

Central Coast Ag Network dba City Farm SLO

**Year Established:** \*

2007

**Fiscal Agent, if different than above:** \*

N/A

**Tax ID #:** \*

203447329

**Document Certifying Federal Tax-Exempt status, if applicable**

2007-07-31 irs exemption letter.pdf

668.85KB

**Name of Executive Director (or highest leadership position)**

Kayla Rutland

**Approximate Annual Budget:**

300,000

**Major Sources of Funding:**

Jewish Community Foundation, Sprouts Foundation, Individual Donors, County of SLO, Earned Revenue.

**Mission Statement:**

To empower youth to live healthier, more prosperous lives through sustainable agriculture and farm-based education.

**Number of paid staff (full- or part-time):**

5

**Number of volunteers:**

65

**Name of Board President or Chair:**

Steven Marx

**Organizational Leadership Chart** \*

2022 City Farm SLO Organizational Chart.pdf

33.87KB

**Name of Person completing this Application:**

Kayla Rutland

**Organization Mailing Address: \***

Street Address

PO Box 3736

Address Line 2

City

San Luis Obispo

Postal / Zip Code

93403

State / Province / Region

California

Country

United States

**Phone: \***

8057698344

**E-mail: \***

kayla@cityfarmslo.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

City Farm SLO is a 501(c)(3) nonprofit organization whose mission is to empower youth to live healthier, more prosperous lives through sustainable agriculture and farm-based education. Our youth programs improve student health and success through education in health and nutrition, science, food literacy, and environmental literacy. City Farm SLO also enables small-scale farmers in sustainable crop production and models regenerative agricultural practices. We increase local food security by distributing the produce generated by our programs back to the community through multiple channels including a close partnership with the SLO Food Bank.

Since 2013, City Farm SLO has delivered Therapeutic Horticulture programming to students with disabilities in partnership with San Luis Coastal Unified School District (SLCUSD). In this program, students complete farm-based lessons aimed at improving task initiation, language skills, following directions, and social skills. Students learn to work independently and in groups, and problem solve. They also enjoy physical activity and can improve their coordination, balance, and endurance. A wealth of research links therapeutic horticulture sessions to improvements in mental wellbeing, physical health, social self-efficacy, and quality of life for people with disabilities.

City Farm SLO is governed by a 5-member board of directors and led by a full-time executive director. We employ 2 full-time staff, 3 part-time staff, and are supported by a full-time AmeriCorps VIP position (starting September 2022), 28 Cal Poly College Corps Fellows (starting September 2022), 6 interns, and more than 60 regular and committed volunteers.

**Describe the community(ies) your organization supports.**



Please be specific in the population and geographic area.

City Farm SLO is located San Luis Obispo, CA. Programming is held on-site and serves youth from across SLO County including Kindergarten-6th grade students, continuation high schoolers attending Pacific Beach High School, teens, and children and young adults with disabilities. 73% of our youth program participants are residents of the City of SLO. Programs target marginalized communities including people of color, low-income, and people with disabilities.

Our programs serve the following constituents:

PBHS Farm Class: Serves students of Pacific Beach High School (PBHS). PBHS provides an alternative secondary education program for students 16 years or older in grades 10-12. All students are considered “at-risk” for one of the following reasons:

- About 1/3 of students experienced difficulty adjusting to the social and learning environments of comprehensive high schools.
- About 1/3 of students are impacted by substance abuse.
- About 1/3 of students exhibit learning disabilities and are served by the Individualized Education Program (IEP) or through Section 504 of the Americans with Disabilities Act.
- 23% of students are English Language Learners and participate in the English Language Development Program (ELD, formerly known as ESL). This is more than twice the percentage in the Comprehensive High Schools.

Youth Empowerment Program (YEP): YEP students are recruited in collaboration with nonprofit partners (Peoples’ Self Help Housing, Restorative Partners, and the Promotores) and SLO County school districts. In YEP’s pilot session, 82% of students identified as people of color. The majority of students are Spanish-speaking, and sessions are conducted bilingually in English and Spanish.

On-the-Farm Field Trips: This program serves Kinder – 6th Grade students throughout San Luis Obispo County. We conduct specific outreach to schools with greater than 50% Free/Reduced Price Lunch Rates and offer fee waivers for these schools.

Therapeutic Horticulture: See more info in part 2, project information.

## PART 2: PROJECT INFORMATION



**Name of DE&I Project \***

Expanding Access to Farm-Based Education for Individuals with Disabilities

**Est. number of people served through this project: \***

2524

**Est. number of SLO CITY RESIDENTS served through this project \***

1,766

**Total Project Cost: \***

70,838

**AMOUNT OF CITY FUNDING REQUESTED: \***

20,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

City Farm SLO requests \$20,000 in matching funds to support the full execution of Expanding Access to Farm-Based Education for Individuals with Disabilities. This capital project will provide critical infrastructure to increase universal accessibility at City Farm SLO for youth in our existing education programs and for individuals reached by our existing community programs.

Since 2013, City Farm SLO has delivered weekly Therapeutic Horticulture programming to students with disabilities in partnership with San Luis Coastal Unified School District. In the 2021-2022 academic year, we tripled the number of students served by this program. The program now serves 36 high-needs students on a regular basis, and this number will increase as services are offered to more special education classrooms. As the demand for services continues to increase, the need for supportive infrastructure is becoming more urgent.

Currently, much of City Farm SLO is inaccessible to students with disabilities. Many students use walkers, wheelchairs, or experience mobility limitations. This project will reduce equity gaps to allow for inclusive participation in programming among all our students through the addition of the following elements:

**Universally Accessible Garden:** This new construction, called "A Garden for All" will feature a decomposed granite foundation and pathways, raised beds at varying heights including full wheelchair access, shade structures, a mobile classroom, cooking cart, and sensory gardens. This space will provide the main instruction area for our Therapeutic Horticulture programming and will also serve students in our Farm Field Trip programs, Youth Empowerment Program, and Pacific Beach High School Farm Class. Garden designs and a detailed budget are available upon request. "A Garden for All" was designed by a stakeholder group consisting of City Farm SLO staff, program participants, SLCUSD staff, TenOver Studios Architects, and local advisors in universal design.

**Universally Accessible Pathway & Signage:** We will install 400 ft length of ADA-compliant pathway to ensure that all students and community members can access key points of City Farm SLO that have been previously inaccessible by wheelchair/walker/etc. This pathway will connect the "Garden for All" to our animal enclosures, fruit orchard, and teaching spaces. We will install twelve standalone educational signs along the pathway at key points. Signage will be ADA compliant and will serve as an educational tool for students and will provide a self-guided walking tour for other visitors.

**Universally Accessible Restroom:** We will replace our single-unit portable restroom with a Clivus Multrum M54 Composting Toilet. This is a cost effective, ADA-compliant alternative to vault toilets, pit latrines, and portable restrooms. This option is designed for use in remote areas like City Farm SLO which does not have sewer access.

#### Project Outputs

- In 2023-2024, the project will be used to deliver 550 individual instruction hours to 40 students in our Therapeutic Horticulture Program
- In 2023-2024, the project will be used to serve 1,284 students in our Farm Field Trip Program, Youth Empowerment Program, and Pacific Beach High School Farm Class
- In 2023-2024, the project will serve more than 1,200 local community members who visit City Farm SLO for volunteer days, farm tours, public and private events, and educational workshops.

#### Project impacts:

- A reduction in equity gaps will allow for equal participation in our youth programs.
- At least 90% of Therapeutic Horticulture program participants will report a mental or physical health benefit.
- At least 90% of community program participants will report a mental or physical health benefit as a result of their experience.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

Primary community served by the project: Students served by our Therapeutic Horticulture Program are enrolled in one of SLCUSD's special education programs. Eligible disabilities include specific learning disabilities, limited intellectual functioning, autism, speech and language impairments, hard of hearing, deaf/blind, visual impairments, emotionally disturbed, orthopedically impaired, other health impaired, and traumatic brain injury.

Secondary community served by the project: In 2021-2022 City Farm SLO welcomed over 1,000 visitors for public events, educational workshops, farm tours, and volunteer days. The majority of visitors are residents of SLO City. 5.8% of residents of SLO City under the age of 65 have a disability. Many of our visitors are senior citizens and experience mobility limitations.

**Describe the equity gaps and community needs this project will address.**

The United States education system has continually underserved students with disabilities as this historically underserved group has chronically underperformed when compared to their peers without disabilities in numerous outcomes including national and state test scores, graduation rates, post high school earnings, and unemployment rates. According to the National Assessment of Educational Progress, across most grade levels and content areas, students with disabilities consistently have the lowest in achievement scores compared to other demographic groups (race/ethnicity, gender, National School Lunch Program eligibility). This effect cascades further and creates longitudinal impacts, including having one of the lowest high school graduation rates (63.1 percent compared to 82.3 percent overall). This translates to an alarming unemployment rate that is roughly twice as high (10.7 percent) compared to people without disabilities (5.1 percent).

The goal of City Farm SLO's Therapeutic Horticulture program aligns with that of SLCUSD; to encourage and facilitate each student to become all that he/she is capable of being through the highest quality programs and services in the least restrictive environments possible.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

**Methods of Evaluation**

Example : # of BIFOC serving on public boards, committees

Complete project installation

Example : # of BIFOC serving on public boards, committees

# of individuals served in the Therapeutic Horticulture program in 2023-2024

Example : # of BIFOC serving on public boards, committees

% of participants who experienced a mental or physical health benefit (as reported by the individual participant or student aide/teacher)

**Indicators of Success / Measurable Outcomes**

Example: 10% increase by end of 2021

Project installation begins by January 2023 and is complete by January 2024

Example: 10% increase by end of 2021

At least 40 individuals will be served by our Therapeutic Horticulture program in 2023-2024

Example: 10% increase by end of 2021

At least 90% of participants will report a mental or physical health benefit in 2023-2024

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

**Name of Partner**

Example: ABC Business

San Luis Coastal Unified School District

Example: ABC Business

Cal Poly & the College Corps Program

**Activity/Service They Provide for This Project**

Example: Free Use of Space for Weekend Classes

Collaborates on Therapeutic Horticulture program - brings students to weekly farm sessions led by City Farm SLO staff.

Example: Free Use of Space for Weekend Classes

College Corps Fellows will support infrastructure build and educational programming

Provide the timeline for this proposed project.

Activities:

- 1. A committee of stakeholders meets regularly to design and manage the project (April 2022- January 2024)
  - 1.1. Stakeholder group formed. Includes City Farm SLO staff, program participants, SLCUSD staff, TenOver Studios Architects, and local advisors in universal design. (April 2022)
  - 1.2. Stakeholder group conducted a needs assessment and subsequently developed a project design and budget. (June -July 2022)
  - 1.3. Stakeholder group has received bids on the construction projects from multiple local contractors and used these bids to develop a final project budget. (August 2022)
  - 1.4. An initial fundraising campaign raised \$7,200 from individual donors and local foundations. (August 2022)
  - 1.5. Stakeholder group works with a local firms to design & print signage (January -March 2023)
- 2. Construction (January 2023 – January 2024)
  - 2.1. Contractor installs a decomposed granite foundation and shade structure supports for the Garden for All. (January 2023)
  - 2.2. City Farm SLO Farm Manager, volunteers, and students build raised beds and mobile classroom. (January 2023)
  - 2.3. Contractor installs the Clivus Multrum M45 Toilet Kit. (February 2023)
  - 2.4. Contractor installs universally accessible pathways. (June – August 2023)
  - 2.5. Signage installation (August – September 2023)
- 3. Project promotion and integration into existing programming
  - 3.1. City Farm SLO Farm Education Coordinator will lead students in the planting of a sensory garden (January 2023)
  - 3.2. A Garden for All will be unveiled with an Open House for students and families (Spring 2023)
  - 3.3. Project will be recognized at our annual fundraiser event (October 2023, 2024)
  - 3.4. All youth programs & community programs use the new infrastructure as a part of programming (ongoing)
- 4. Project maintenance
  - 4.1. Ongoing maintenance of the Garden for All will be led by the Farm Education Coordinator with support from Cal Poly College Corps Fellows and students in our youth education programs. (ongoing)
  - 4.2. Annual re-grade of walkways will be done by contractor (annual)
  - 4.3. Reprint of signage (every 5-10 years)
  - 4.4. Bathroom structure will be maintained by City Farm SLO's Farm Manager (as needed)

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

The City's one-year award funds will be used for a capital infrastructure project to support ongoing, funded programming. Once installed, we anticipate annual maintenance costs of \$2,500-3,500 per year to include regrading decomposed granite walkways, bathroom maintenance, raised bed maintenance, and signage reprint (every 5-10 years). These annual maintenance costs will be written into future program budgets.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Universally Accessible Garden (Materials & Installation)	\$ 20,143.00	\$ 5,000.00	\$ 15,143.00

2	Universally Accessible Pathway & Signage (Materials & Installation)	\$ 18,195.00	\$ 10,000.00	\$ 8,159.00
3	Universally Accessible Restroom (Materials & Installation)	\$ 32,500.00	\$ 5,000.00	\$ 27,500.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY

### Describe the plan for promoting this project within the City of San Luis Obispo.

This project will be put to immediate use within our longstanding programs including Therapeutic Horticulture, Farm Class offered in partnership with Pacific Beach High School, Farm Field Trips serving Kindergarten – 6th grade classrooms throughout SLO County, and the Youth Empowerment Program for underserved teens in SLO County.

Outside of our youth education programs, this project will be immediately incorporated into our existing Farm Tour Program and Volunteer Programs which are open to all community members.

The project will be highlighted at our Open House event for families and students in our Therapeutic Horticulture Programs and Graduation Ceremonies for our Youth Empowerment Program. It will also be highlighted at our many public events and tours which bring more than 1200 visitors every year.

### How will you highlight the City's support of your project?

Supporters of City Farm SLO are recognized on our website, social media, and email newsletters. Supporters of the Garden for All project will be specifically recognized with permanent signage within the physical garden space. Other structures including ADA bathrooms and site signage allow opportunities for sponsor recognition; we welcome the City's requests or ideas!

## PART 5: CERTIFICATION

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Kayla Rutland

### Signature \*



### Title: \*

Executive Director

### Date: \*

8/25/2022

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 31 2007

CENTRAL COAST AGNETWORK INC  
PO BOX 3736  
SAN LUIS OBISPO, CA 93403

Employer Identification Number:  
20-3447329  
DLN:  
606242096  
Contact Person:  
ROBERTA VAN METER ID# 52624  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
August 31  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
July 2, 2007  
Contribution Deductibility:  
Yes  
Advance Ruling Ending Date:  
August 31, 2011

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. During your advance ruling period, you will be treated as a public charity. Your advance ruling period begins with the effective date of your exemption and ends with advance ruling ending date shown in the heading of the letter.

Shortly before the end of your advance ruling period, we will send you Form 8734, Support Schedule for Advance Ruling Period. You will have 90 days after the end of your advance ruling period to return the completed form. We will then notify you, in writing, about your public charity status.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

This is a copy of the original paper document, scanned by Ty Griffin on 12/9/2020. It replaces an older and worse scanned version. As of this date, the original paper document is in our permanent records box.

Letter 1045 (DO/CG)



CENTRAL COAST AGNETWORK INC

Sincerely,

A handwritten signature in dark ink, appearing to read "Robert Choi". The signature is fluid and cursive, with the first name "Robert" being more prominent than the last name "Choi".

Robert Choi  
Director, Exempt Organizations  
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)  
Statute Extension

City Farm SLO Organizational Chart

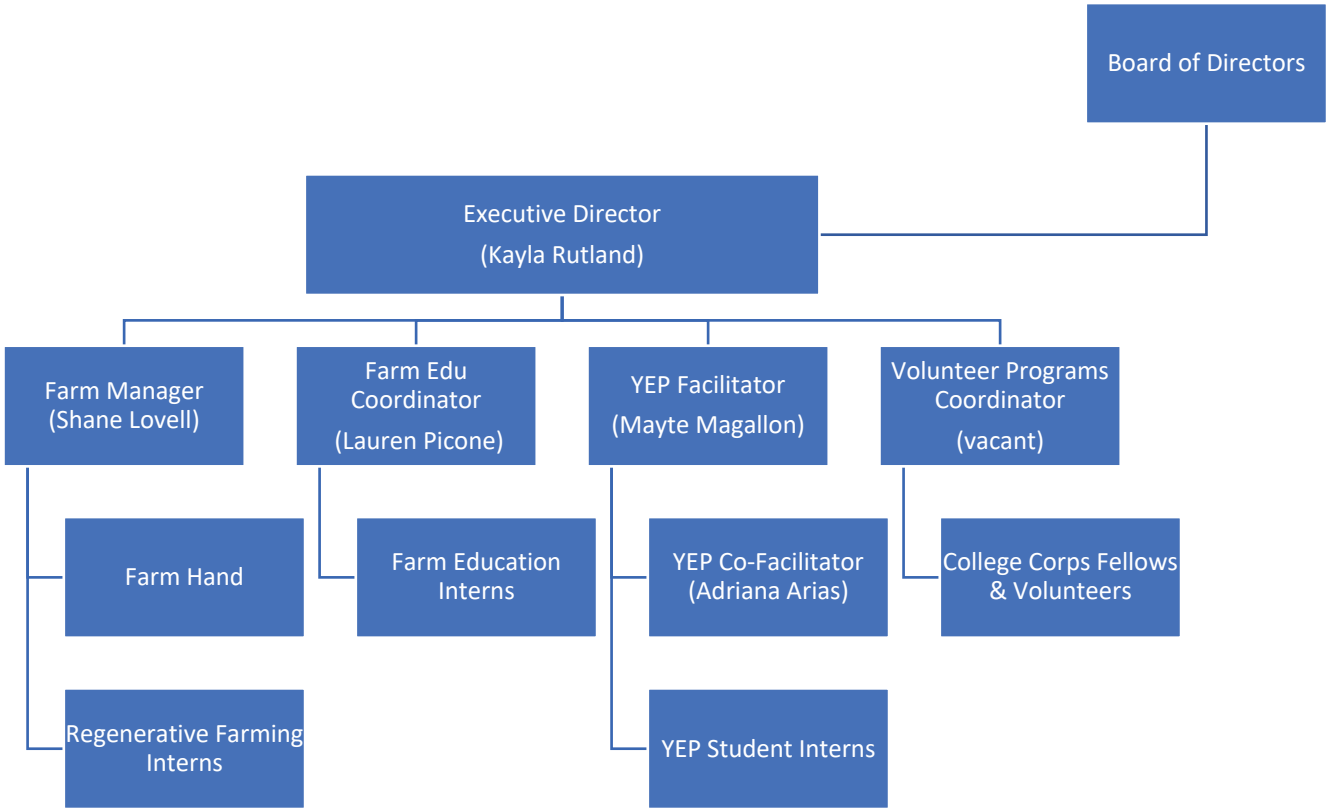




EXHIBIT B

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

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**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

_____ Name	_____ Title	_____ Phone
_____ Signature	_____ Date	_____ E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 11/21/2022 | 9:09 AM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Restorative Partners (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to Restorative Conferencing Program as submitted in its application to the CITY on August 31, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$18,525, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

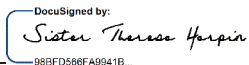
City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

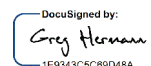
Restorative Partners  
3196 S. Higuera Street, Suite D  
San Luis Obispo, CA 93401  
sistertheresa@restorativepartners.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

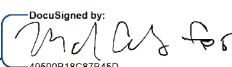
Grantee

By:  \_\_\_\_\_  
DocuSigned by:  
Sister Theresa Herpin  
98BFD568FA9941B...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
DocuSigned by:  
Greg Hermann  
1E9343C5C89D48A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
DocuSigned by:  
Christine Dietrick  
45690B18C87B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

Exh. A

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION



**Organization Name: \***

Restorative Partners

**Year Established: \***

2011

**Fiscal Agent, if different than above: \***

n/a

**Tax ID #: \***

474825349

**Document Certifying Federal Tax-Exempt status, if applicable**

IRS 501c(3) Declaration 11.12.15.pdf

1.07MB

**Name of Executive Director (or highest leadership position)**

Sister Theresa Harpin

**Approximate Annual Budget:**

2,300,000

**Major Sources of Funding:**

GEO Reentry Services; SLO County Behavioral Health; Drug & Alcohol Services; CalOES; SLO County Sheriff's Office

**Mission Statement:**

Transforming lives impacted by crime through healing services and relationships.

**Number of paid staff (full- or part-time):**

22

**Number of volunteers:**

200

**Name of Board President or Chair:**

Mark Connely

**Organizational Leadership Chart \***

RP Org Leadership Chart.docx

37.75KB

**Name of Person completing this Application:**

Sister Theresa Harpin

**Organization Mailing Address: \***

Street Address

3196 S. Higuera St, Suite D

Address Line 2

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93401

Country

United States

**Phone: \***

8052421272

**E-mail: \***

sistertheresa@restorativepartners.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

Restorative Partners, Inc. (RP) is a non-profit 501(c)(3) agency located in San Luis Obispo County. We are governed by a Board of Directors and the organization is led by an Executive Director. The goal of our work is to reduce violence and lower recidivism by providing restorative alternatives to incarceration and, for those who are in custody, by providing a continuum of care from incarceration through reincorporation into the community. We do this through a number of programs and services designed to meet the diverse needs of system-involved people in our community.

Our work began in 2011 with in-custody programming at the San Luis Obispo County Jail. We currently coordinate and facilitate over 30 programs at the County Jail and Honor Farm, and at the County Juvenile Hall. We also coordinate an Adult Reentry Mentorship Program that matches volunteer mentors with newly-released adults and a Vocational Training Program that supports returned citizens through job readiness programs. We operate five recovery homes throughout the county for individuals needing outpatient treatment, people on Probation and Parole, and women reuniting with their children. These residences provide housing for over 45 men, women, and children each night.

In 2019, we added a Restorative Conferencing Program that provides alternatives to traditional methods of punitive justice. Our certified facilitators coordinate Restorative Conferences in partnership with our Housing & Treatment Team to address harm and relapse within our recovery housing and substance use treatment programs. We also partner with the local court system to provide Restorative Conferencing as an alternative or supplement to the traditional criminal justice process. We are in the process of advocating for this practice to be adopted on a larger scale in our community.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

Restorative Partners provides supportive, holistic services to a number of populations throughout SLO County. We work with people in custody at the SLO County Jail and Juvenile Hall, and those who are returning to our community from incarceration in those facilities and state and federal prisons. We operate two homes for men on parole in San Luis Obispo, a home for women in recovery from substance use and women on parole in Los Osos, a home for men in recovery from substance use in Los Osos, and a home for women reuniting with their children in Paso Robles. Our Mentorship Program provides social-emotional support for our clients and graduates by pairing returned citizens and those in recovery with a volunteer Mentor from the community. Mentors provide pro-social support for Mentees and help them work toward reentry and/or recovery goals.

**PART 2: PROJECT INFORMATION****Name of DE&I Project \***

Restorative Conferencing Program

**Est. number of people served through this project: \***

20

**Est. number of SLO CITY RESIDENTS served through this project \***

10

**Total Project Cost: \***

74,100

**AMOUNT OF CITY FUNDING REQUESTED: \***

55,492

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

We are proposing an expansion of the Restorative Partners Restorative Conferencing Program. At this time, the program is run on a very part-time basis as part of our Education Program. We are applying for funding to expand the program to a full-time position (the Restorative Conference Program Coordinator) within our Programs & Services Department. By doing this, we hope to expand our impact from 2 Restorative Conferences to 10 for the 2023 calendar year.

We have estimated that this program will serve 20 people (including those who have caused harm and those who have been harmed) through 10 Restorative Conferences in 2023, but this does not take into account conferences that involve more than one person who has caused harm or more than one person who has been harmed. For this reason, we have stated our goal as serving 20+ individuals through 10 conferences. We also anticipate that the impact of this program will be far greater when we consider the families, friends, and other support systems of those individuals. Restorative justice processes involve everyone impacted by harm or wrongdoing, not just those who might be traditionally referred to as "victims and offenders." This often includes their support systems, who are given a chance to speak about how they, themselves, have been affected and what their needs are. This ripple effect creates a powerful web of healing and accountability after harm has been done. These support people are also part of the "plus" in our 20+ goal.

The Restorative Conference Program (RCP) Coordinator hired through this grant will lead the outreach efforts with community partners and coordinate the logistics of the conferences, as well as scheduling facilitators. We currently have five facilitators on staff.

During a restorative process, we ask questions like "Who has been harmed? What do they need? Whose obligation is it to meet these needs?" This process recognizes that there can be a multitude of stakeholders in any given situation - not necessarily just a victim and an offender. We also recognize that there is also not always a victim-offender binary when harm has been caused, so these processes don't prescribe the outcome of each situation because we know that relationships and situations can be tricky and complex. In these instances, a conference can help determine who needs to take accountability for what, and what healing needs to occur for everyone involved. The International Institute for Restorative Practices - the entity through which our staff are trained as facilitators - explains that "a restorative conference is a specific process, with defined protocols, that brings together those who have caused harm through their wrongdoing with those they have directly or indirectly harmed." Through Restorative Conferences, our trained facilitators lead a process that allows those who have been harmed to speak about their needs and for those who have caused harm to listen, take accountability, and take action steps to repair the relationship.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

The Restorative Conferencing Program will support individuals involved in the local criminal justice system - those who have been harmed and those who have caused harm. By providing alternatives to traditional, punitive justice processes, this program will allow individuals to pursue healing and resolution and will center the needs of those who have been harmed. These services will take place at our offices in San Luis Obispo and will be run in partnership with City and County officials.

**Describe the equity gaps and community needs this project will address.**

74% of people in American Jails have not been convicted. This is largely due to bail policies that keep people incarcerated if they cannot afford to buy their release. The median bail amount for a felony charge is \$10,000. A study by the Prison Policy Initiative showed that that figure represents 8 months of income for a typical person who is detained because they cannot pay bail. The current bail system punishes and reinforces poverty by keeping those who cannot afford bail in custody and impacting both current and future employment.

We also know that these systems disproportionately impact BIPOC communities. Nationally, Black men are six times as likely to be incarcerated as White men and Latinx men are more than twice as likely to be incarcerated as White men. Locally, the SLO County Probation Department reports that in the 2018-19 fiscal year, of those on formal Probation, 64.3% were White, 28.0% were Latinx, and 3.6% were Black - compared to local population statistics from 2019 that were 84.2%, 18.3%, and 2.2%, respectively. We have tried a number of times to gain access to statistics from our local Jail and are currently advocating again for increased transparency about the population of the SLO County Jail, so we aren't able to report on the demographics of those incarcerated in the facility at this time. However, from the Probation statistics alone, it is clear that BIPOC communities are overrepresented in our local justice system.

Overall, BIPOC are more likely than White people to be arrested; once arrested, BIPOC are more likely to be convicted; and once convicted, BIPOC are more likely to face stiff sentences. Anti-racism and restorative justice are, therefore, linked because restorative justice offers alternatives to these traditional punitive systems, as discussed in a previous section. Our first Restorative Conferencing Program client to come through the courts was a man of color who was facing felony charges after a fight because he had a prison-prior from his youth. We were able to advocate along with his Public Defender for a Restorative Conference. Through this process, the person who had been harmed in the case was able to say that they didn't want the person who had caused harm to go back to prison. Instead, the person who caused harm was able to enroll in anger management classes and therapy with our agency. He is on a path to healing and restoration that likely would not have happened had he been sentenced to another prison term. Through this process, we also witnessed a transformation in the way the Prosecutor and Judge thought about the case. They were able to ask the person who had been harmed about his needs and make decisions based on his input.

We offer Restorative Conferencing within our programs as a way to disrupt these systems because early intervention can help keep our reentry clients from returning to custody. We are advocating for this process to be adopted by our local courts on a more consistent basis for that same reason. If we can provide alternatives to incarceration through a restorative, anti-racism lens, we can help keep BIPOC from being disproportionately booked, incarcerated, and imprisoned. If funded, our Restorative Conferencing Program has the potential to keep people out of custody and provide actionable pathways to healing and restoration.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Percentage of individuals referred to the program who are facing incarceration and are diverted from incarceration to other services (clinical services, residential treatment, vocational support, etc.) due to a Restorative Conference process	100%
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Percentage of individuals who have caused harm who follow through with Restorative Conferencing Agreements (therapy, anger management, substance use treatment, restitution, apology, etc.)	100%

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.



Name of Partner

Example: ABC Business

SLO County Public Defenders (in progress)

Example: ABC Business

SLO County DA's Office (in progress)

Example: ABC Business

SLO County Superior Court (in progress)

Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes

Referring clients and cases for Restorative Conferencing

Example: Free Use of Space for Weekend Classes

Referring clients and cases for Restorative Conferencing

Example: Free Use of Space for Weekend Classes

Referring clients and cases for Restorative Conferencing

Provide the timeline for this proposed project.

January 2023: Hiring begins for Program Coordinator, new hire is trained

February 2023: Program Coordinator and Restorative Justice Programs Director continue outreach to courts, DA's Office, and Public Defenders, and other community agencies and partners

Ongoing: Coordination and facilitation of Restorative Conferences, continued outreach to partners for referrals

March/April 2023: First Progress Report

Ongoing: Coordination and facilitation of Restorative Conferences, continued outreach to partners for referrals

June/July 2023: Mid-Year Impact Report

Ongoing: Coordination and facilitation of Restorative Conferences, continued outreach to partners for referrals

December 2023: Final Impact Report

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

Funding from the City of SLO will allow us to expand this program from part-time to full-time. We anticipate that a year of full-time funding will allow us to measure outcomes and pursue additional funding to make the program sustainable. We will also be pursuing contracts with various justice system partners to help sustain this program beyond the funding year. District Attorney Dan Dow has agreed to support this proposal and help our team find sustainable funding in the grant year.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Restorative Justice Programs Director: Provides direct program supervision, training, direct client services. .25 FTE x \$62,400	\$ 15,600.00	\$ 0.00	\$ 15,600.00
2 Restorative Conference Program Coordinator: Lead the outreach efforts with community partners and coordinate the logistics of the conferences, as well as scheduling facilitators. 1FTE x \$43,680	\$ 43,680.00	\$ 43,680.00	\$ 0.00

3	RP Employee Benefits: Includes SSI, Medicare, SUI, ETT, WC, Health Benefits. salaries x 18%	\$ 10,670.00	\$ 7,862.00	\$ 2,808.00
4	Mileage reimbursement, phone stipend, IT support, Database access. \$175/month	\$ 2,100.00	\$ 2,100.00	\$ 0.00
5	Office Supplies: \$100/Monthly	\$ 1,200.00	\$ 1,000.00	\$ 200.00
6	Laptop: Laptop, Microsoft professional	\$ 850.00	\$ 850.00	\$ 0.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY

### Describe the plan for promoting this project within the City of San Luis Obispo.

We are already in partnership with the Public Defender's Office to advocate for Restorative Conferencing with their clients. We are also providing training and information for the District Attorneys and the Judges about this program and the possibilities that come with adopting this framework. We have been working with the Sheriff's Office and Probation Department since our agency was founded and we are already in conversation with them about the possibilities Restorative Conferencing presents for their work. We plan to speak with the SLO Police Department as well. Having a full-time staff person to coordinate this outreach will increase our capacity to continue this promotion of the program, in addition to the coordination of the services.

### How will you highlight the City's support of your project?

The City of SLO will be mentioned in outreach regarding this project. We will also emphasize the role the City played in any press releases and newsletters we send with regards to the Restorative Conferencing Project. Since this grant would provide the initial funding to expand the program to full-time, we would also acknowledge the City in ongoing marketing and outreach as we work to make it sustainable.


## PART 5: CERTIFICATION

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Vivien Devaney

### Signature \*



### Title: \*

Associate Director

### Date: \*

8/31/2022

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

NOV 12 2015

Date:

RESTORATIVE PARTNERS INC  
793 E FOOTHILL BLVD  
SAN LUIS OBISPO, CA 93405-1615

Employer Identification Number:  
47-4825349

DLN:

17053272375015

Contact Person:

JACOB A MCDONALD

ID# 31649

Contact Telephone Number:  
(877) 829-5500

Accounting Period Ending:  
June 30

Public Charity Status:

170(b)(1)(A)(vi)

Form 990/990-EZ/990-N Required:

Yes

Effective Date of Exemption:

July 8, 2015

Contribution Deductibility:

Yes

Addendum Applies:

No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

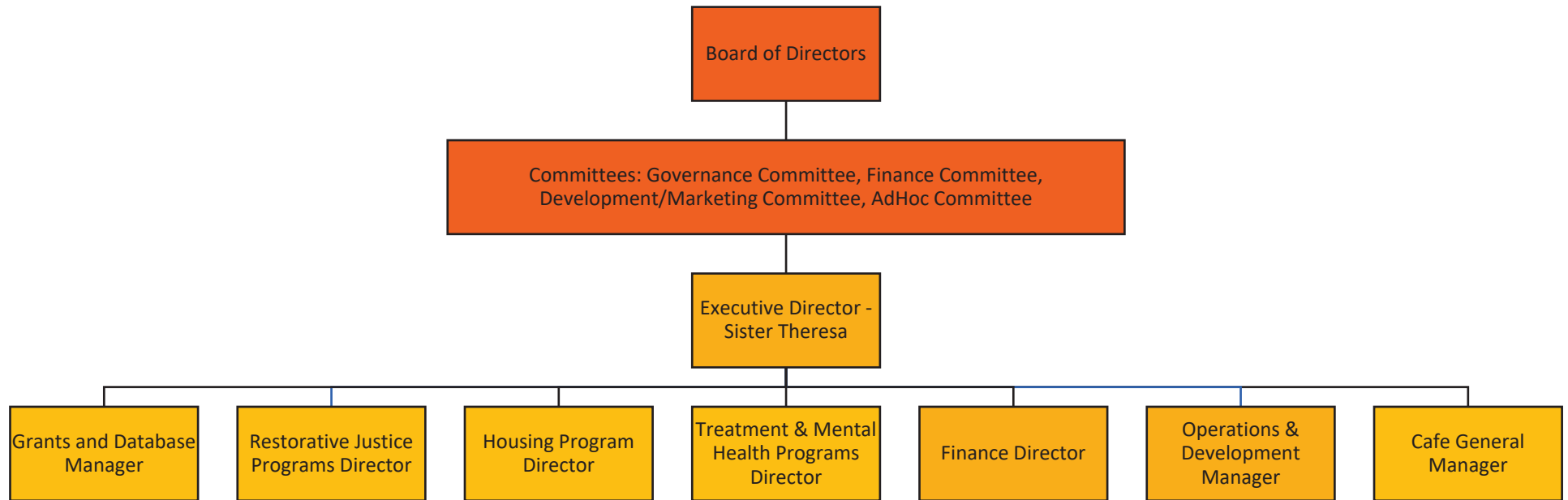
Letter 947

RESTORATIVE PARTNERS INC

Sincerely,

A handwritten signature in dark ink, appearing to read "J. Cooper", written in a cursive style.

Jeffrey I. Cooper  
Director, Exempt Organizations  
Rulings and Agreements



**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

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**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

12/5/2022 | 1:51 PM PST

THIS AGREEMENT, dated \_\_\_\_\_ for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and San Luis Obispo Museum of Art (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to IDEA: Inclusion, Diversity, Equity, and Access as submitted in its application to the CITY on August 16, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$5000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said



termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:


San Luis Obispo Museum of Art  
1010 Broad Street  
San Luis Obispo, CA 93401  
eellis@sloma.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:


Grantee

By:    
7F86A74578B6401...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:    
1E9343C5C69D48A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:    
49590B18C87B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

## Exh. A

### 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION

**Organization Name: \***

San Luis Obispo Museum of Art

**Year Established: \***

1966

**Fiscal Agent, if different than above: \***

n/a

**Tax ID #: \***

956134270

**Document Certifying Federal Tax-Exempt status, if applicable**

SLOMA 501c3\_combined.pdf

106.57KB

**Name of Executive Director (or highest leadership position)**

Leann Standish

**Approximate Annual Budget:**

1,100,000

**Major Sources of Funding:**

Individual donors, the Community Foundation of SLO County, the Hind Foundation, California Arts Council, the Harold J. Miossi Charitable Trust, and various corporate sponsors including PG&E, KSBY, and RRM.

**Mission Statement:**

To provide and promote diverse visual arts experiences for people of all ages and backgrounds through exhibition, education, creation, and collaboration.

**Number of paid staff (full- or part-time):**

8

**Number of volunteers:**

25

**Name of Board President or Chair:**

Barbara Bell

**Organizational Leadership Chart \***

SLOMA org chart May 2022.pdf

78.37KB

**Name of Person completing this Application:**

Erica Ellis

**Organization Mailing Address: \***

Street Address

1010 Broad Street

Address Line 2

City

San Luis Obispo

Postal / Zip Code

93401

State / Province / Region

CA

Country

USA

**Phone: \***

805-543-8562

**E-mail: \***

eellis@sloma.org

**Briefly describe your organization’s mission, primary activities, and operating structures.**

The mission of the San Luis Obispo Museum of Art (SLOMA) is to provide and promote diverse visual arts experiences for people of all ages and backgrounds through exhibition, education, creation, and collaboration. Our primary activities include admission-free visual arts exhibitions at our 1010 Broad Street location, commissioned public artworks around the City of San Luis Obispo, and free visual arts education for youths and adults. The Museum is led by a volunteer Board of Directors; our Executive Director Leann Standish manages the Museum’s staff.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

**PART 2: PROJECT INFORMATION**



**Name of DE&I Project \***

IDEA: Inclusion, Diversity, Equity, and Access

**Est. number of people served through this project: \***

15000

**Est. number of SLO CITY RESIDENTS served through this project \***

47500

**Total Project Cost: \***

100,000

**AMOUNT OF CITY FUNDING REQUESTED: \***

50,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

Our Inclusion, Diversity, Equity, and Access (IDEA) project encompasses a broad variety of activities touching upon the Museum's internal policies and our public programming with the aim of creating sustainable, cohesive, and meaningful changes to our operations and community engagement. Funds will support multiple interconnected projects and initiatives under the IDEA umbrella including: the creation of a land acknowledgement in collaboration with representatives of the Northern Chumash; partnering with local grassroots organizations through arts events at the Museum to expand access and engagement with the visual arts by historically under-resourced or excluded communities; integrating accessibility accommodations and language translation services into our exhibitions and public programs; researching the incorporation of Universal Design elements in exhibition and programs; providing free gallery tours and visual arts activities to children attending Title 1 schools; contracting with a DEI consultant to help craft institutional policies and benchmarks with our IDEA Task Force; promote bilingual exhibitions and programming aimed at engaging Latinx communities; and providing free bilingual arts activities for K-12 youth through our Second Saturdays program.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

This project will support historically under-resourced and excluded communities within the City of San Luis Obispo, as well as visitors/tourists to the Museum from outside the area. Services will be provided at the Museum of Art in downtown San Luis Obispo, on our lawn at the west end of Mission Plaza, and at community events within the City of San Luis Obispo. Bilingual exhibition and programming materials support English language learners and immigrants from Latinx communities. Accessibility improvements will support visitors of all ages and backgrounds seeking access accommodations to engage with the visual arts.

According to US Census Bureau, 17% of families within the City of San Luis Obispo speak a language other than English at home, with over 11% of this population speaking Spanish. This amounts to thousands of SLO residents that could directly benefit from having Spanish exhibition and programming freely available at the Museum. Funds will support SLOMA's Second Saturdays program which provides free, bilingual art activity boxes for families to gain hands-on visual arts education. Funds will also support professional translation services for SLOMA's exhibition and programming material to make them more accessible.

The City's DEI funds will also support free tours and hands-on arts activities for children attending Title 1 schools. Title 1 schools are public schools in which children from low-income families make up at least 40 percent of enrollment.

Part of the IDEA project also involves highlighting contemporary artists from historically under-represented communities to tell diverse stories through the visual arts. For so long within the arts industry, non-white artists and female artists have been excluded from the mainstream, representing a very real equity gap in the visual arts. Funds from this project will help support an exhibition by contemporary Mexican-American artist Marela Zacarías in the Spring of 2023, as well as complementary public programming, to meet community needs of arts engagement.

**Describe the equity gaps and community needs this project will address.**

This project will address gaps in arts access and representation through a variety of community-facing programs including our Second Saturdays youth art activities, school tours, and our admission-free exhibitions.

According to a February 2022 article in CalMatters, only 1 in 5 public schools in California has a “dedicated teacher for traditional arts programs like music, dance, theater, and art,” with schools serving Black and Latinx populations the least likely to have arts access. With the emergence of COVID-19, access to arts instruction was cut even further, with many students having no access at all. SLOMA’s youth education program serves a local need by providing free, accessible, and comprehensive visual arts education for K-12 children, as well as educational tools for teachers, mentors, and parents throughout the City of SLO.

This project will also work to improve the Museum’s meaningful engagement with the diverse communities we serve through concrete policy and programming changes aimed at expanding outreach and collaboration with BIPOC, Latinx, LGBTQIA+, and other communities historically under-represented in the arts industry. We regularly partner with local grassroots organizations like R.A.C.E. Matters SLO, the Latino Outreach Council, GALA SLO, and others to host community-building experiences during public events like Art After Dark and exhibition openings to provide collaboration opportunities within the SLO nonprofit community. In an article for the 2018 Museums and the Web conference, Haitham Eid of the Southern University at New Orleans noted that, “when different communities see themselves represented..., it increases public trust and improves the image of the institution in the public domain.” Museums with diverse programming, representatives, and partnerships connect with the diverse communities they serve, which is a major point in SLOMA’s 2022-2025 Strategic Plan. As the only art museum in the City of SLO, it’s important that we step up to meet the needs of all members of the community.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

**Methods of Evaluation**

Example : # of BIPOC serving on public boards, committees

1. # of programming collaborations with grassroots organizations

Example : # of BIPOC serving on public boards, committees

2. Increase diversity on our Board of Directors, including prioritizing new members with diversity, equity and inclusion knowledge related to the Arts

Example : # of BIPOC serving on public boards, committees

3. # of participants in free bilingual youth art programming

**Indicators of Success / Measurable Outcomes**

Example: 10% increase by end of 2021

10% increase by end of 2023

Example: 10% increase by end of 2021

10% increase by end of next BOD term

Example: 10% increase by end of 2021

10% increase by end of 2023

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

**Name of Partner**

Example: ABCBusiness

Jennifer Terramoto Pedrotti

Example: ABCBusiness

R.A.C.E. Matters SLO

Example: ABCBusiness

SLO County YMCA

Example: ABCBusiness

SLO County Office of Education

**Activity/Service They Provide for This Project**

Example: Free Use of Space for Weekend Classes

DEI Consultant

Example: Free Use of Space for Weekend Classes

programming to complement an exhibition in 2023 or 2024

Example: Free Use of Space for Weekend Classes

youth gallery tour & art activities partner

Example: Free Use of Space for Weekend Classes

curriculum support and connections with county schools for tour scheduling

Example: ABC Business  
GALA Pride and Diversity Center

Example: ABC Business  
Latino Outreach Council

Example: Free Use of Space for Weekend Classes  
programming partner & promotional support

Example: Free Use of Space for Weekend Classes  
working with SLOMA to plan future exhibition  
featuring a Latinx artist

**Provide the timeline for this proposed project.**

The project is already partially underway with continued work on the Museum’s Mission and Vision statements and the Strategic Plan. There is no formal end date for this project as it concerns the continuing integration of IDEA practices and partnerships in the Museum’s operations and mission. The scope of the project will continue to grow to meet changing community needs.

**Describe your plan for sustainability beyond the City’s one-year award funding, if applicable.**

The policies and partnerships gained through the first year of this project will lay a solid foundation for future work and demonstrate the Museum’s commitment to IDEA practices for future funders. The IDEA Task Force is chaired by volunteers from the Museum’s Board of Directors and is therefore able to proceed in some capacity beyond the City’s one-year award funding, though expansion of programming under the IDEA umbrella will require future support from private or foundation donors.

**PART 3: PROJECT COST / BUDGET**



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Translation, accessibility, tours – arts edu pgms	\$ 50,000.00	\$ 20,000.00	\$ 30,000.00
2 DEI consultant fees, mission & vision projects	\$ 20,000.00	\$ 10,000.00	\$ 10,000.00
3 Collaboration events with grassroots orgs	\$ 5,000.00	\$ 5,000.00	\$ 0.00
4 Latinx-focused programming as part of Marela Zacarías	\$ 40,000.00	\$ 15,000.00	\$ 25,000.00

\*During application review , you may be asked for further financial information or for proof of any matching funds

**PART 4: AWARENESS AND VISIBILITY**



**Describe the plan for promoting this project within the City of San Luis Obispo.**

Press releases through the City of SLO’s promotional partners and local media outlets, social media, and the Museum’s website (slo.ma.org) will be the main avenues of promotion. We will also rely on word of mouth through our partnerships with local grassroots organizations. We will also promote this unique partnership through museum industry channels as a model for other communities throughout the United States.

**How will you highlight the City’s support of your project?**

The City of SLO’s support will be noted in all media releases about the project and the City’s logo will be included in award-supported programming and exhibitions. The City will also be listed as a supporter on the Museum’s annual Donor Wall near the Broad Street entrance.

**PART 5: CERTIFICATION**



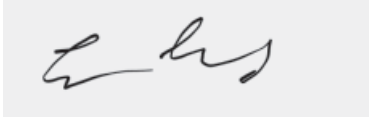
By signing this application, I certify that the information contained within is true and correct to the best of my

knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person completing this Application: \***

Erica Ellis

**Signature \***

A handwritten signature in black ink, appearing to read 'Erica Ellis', is displayed on a light gray rectangular background.

**Title: \***

Operations and Collections Manager

**Date: \***

8/16/2022



U. S. TREASURY DEPARTMENT  
INTERNAL REVENUE SERVICE

DISTRICT DIRECTOR

P. O. BOX 231

LOS ANGELES, CALIFORNIA 90033

June 6, 1966

IN REPLY REFER TO

Code 444:HJC

608-4884

LA-EO-66-572

95-6134270

San Luis Obispo Art Association  
1020 Broad Street  
P. O. Box 813  
San Luis Obispo, California 93401

Gentlemen:

We have considered your application for exemption from Federal income tax under section 501(c)(3) of the Internal Revenue Code of 1954.

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

You are not required to file Federal income tax returns so long as you retain an exempt status, unless you are subject to the tax on unrelated business income imposed by section 511 of the Code, in which event you are required to file Form 990-T.

You are, however, required to file an information return, Form 990-A, annually, on or before the 15th day of the fifth month after the close of your annual accounting period.

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

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





Department of the Treasury  
Internal Revenue Service

OGDEN UT 84201-0046

In reply refer to: 0423246387  
Oct. 28, 2011 LTR 252C 0  
95-6134270 000000 00  
Input Op: 0423246387 00004167  
BODC: TE

SAN LUIS OBISPO MUSEUM OF ART  
PO BOX 813  
SN LUIS OBISP CA 93406-0813



021278

Taxpayer Identification Number: 95-6134270

Dear Taxpayer:

Thank you for the inquiry dated Sep. 21, 2011.

We have changed the name on your account as requested. The number shown above is valid for use on all tax documents.

If you need forms, schedules, or publications, you may get them by visiting the IRS website at [www.irs.gov](http://www.irs.gov) or by calling toll-free at 1-800-TAX-FORM (1-800-829-3676).

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

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

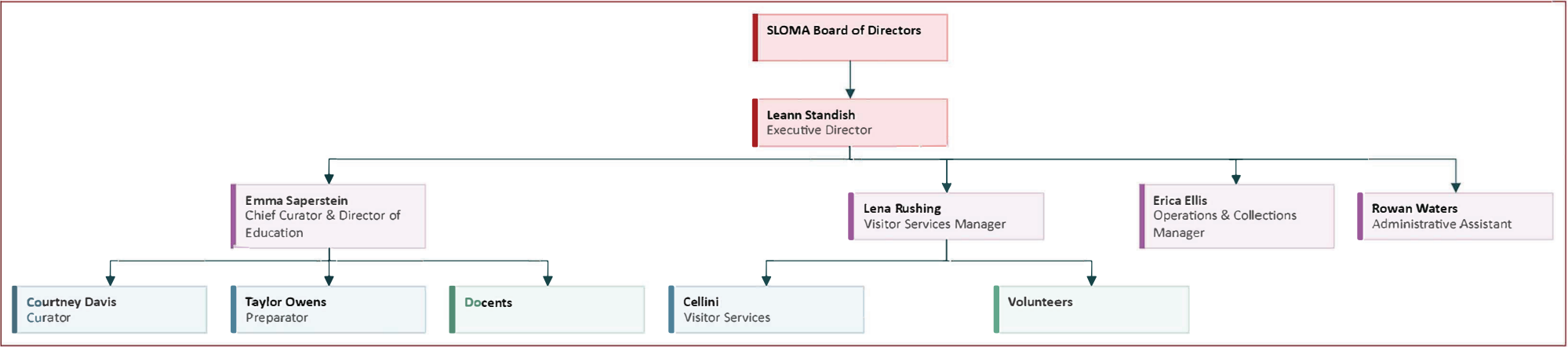
Whenever you write, please include this letter and, in the spaces below, give us your telephone number with the hours we can reach you. Also, you may want to keep a copy of this letter for your records.

Telephone Number ( ) \_\_\_\_\_ Hours \_\_\_\_\_

Sincerely yours,

Sheila Bronson  
Dept. Manager, Code & Edit/Entity 3

Enclosure(s):  
Copy of this letter



**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 11/21/2022 | 8:49 AM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and The Diversity Coalition of San Luis Obispo (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to the speaking program and speaking series as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$17,500, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

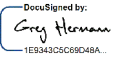
GRANTEE:  
The Diversity Coalition of San Luis Obispo  
Greg Ellis  
PO Box 376  
Arroyo Grande, CA 93421  
gregjohnellis@gmail.com

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
Greg Ellis, Grant Manager

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

## 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

### PART 1: APPLICANT INFORMATION

**Organization Name: \***

The Diversity Coalition of San Luis Obispo

**Year Established: \***

2011

**Fiscal Agent, if different than above: \***

n/a

**Tax ID #: \***

822075135

**Document Certifying Federal Tax-Exempt status, if applicable**

Diversity Coalition Letter of Determination.pdf

249.94KB

**Name of Executive Director (or highest leadership position)**

Rita Casaverde

**Approximate Annual Budget:**

120,000

**Major Sources of Funding:**

1200x supporting members - \$25,000; City of Morro Bay, City of Arroyo Grande, City of Pismo - \$15,000; PG&E - \$5,000; CFSLOC - \$30,000 (pending);

**Mission Statement:**

The Coalition provides educational programs and resources to facilitate and advance the efforts of our affiliated organizations in order to promote and advocate for diversity, equity, and inclusion.

**Number of paid staff (full- or part-time):**

2

**Number of volunteers:**

8

**Name of Board President or Chair:**

Cornel Morton

**Organizational Leadership Chart \***

DCSLOC Board of Directors (1).pdf

75.43KB

**Name of Person completing this Application:**

Greg Ellis

**Organization Mailing Address: \***

Street Address

P.O. Box 376

Address Line 2

City

Arroyo Grande

State / Province / Region

CA

Postal / Zip Code

93421

Country

USA

**Phone: \***

(805) 270-3511

**E-mail: \***

gregjohnellis@gmail.com

**Briefly describe your organization's mission, primary activities, and operating structures.**

The Diversity Coalition of San Luis Obispo County's mission is to provide educational programs and resources to facilitate and advance the efforts of our affiliated organizations in order to promote and advocate for diversity, equity, and inclusion.

The Coalition primarily engages in the following educational programming:

School Speaker Program - We bring renowned diversity speakers to the classroom in three school districts to share their unique and compelling experiences with thousands of students each year.

Fostering Understanding in Our Community - We connect the community with our outstanding speakers and panelists through public presentations.

DEI Training - Many individuals, organizations and businesses would like to become allies of diversity, aligning their organizational structures, policies, practices, personal knowledge and behaviors with their belief in equality. There is a great need for a locally-based Diversity, Equity and Inclusion training to teach this willing audience and leverage their enthusiasm into action, creating tangible changes in our community. We are taking steps to develop an impactful, affordable, self-sustaining program that fills this local need and expect to pilot the program within the next year.

Local Collaborative Leadership - We amplify the voices and experiences of our coalition by staying involved with local diversity efforts, including our affiliated organizations, the Sheriff's Office Unity Committee, and the different DEI governmental efforts.

Our organization is led by an Executive Director, Rita Casaverde, who works with the board of directors to determine organizational strategy and plan and implement programming. The board members take on specific roles to support program implementation and expansion (see attached Organizational Structure document).

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

We will reach 4000 students who, on average, represent the following demographics:

Unduplicated Pupil Count of Free/Reduced-Price Meals, English Learners & Foster Youth: 47.6%

White: 47%; Latino: 47%; Black or African American: 1%; Asian: 2%; Other: 3%;

In addition, the 500 community members we reach represent the following:

White: 71%; Black or African American: 2%; Asian: 3%; Hispanic or Latino: 21%; Other: 3%;

Household Income: Median \$59,628;

Educational Attainment - HS Graduate: 21%; Some college: 27%; Associate's degree: 10%; Bachelor's degree: 20%; Graduate or prof. degree: 12%;

**PART 2: PROJECT INFORMATION****Name of DE&I Project \***



Diversity Coalition Programming

**Est. number of people served through this project: \***

4000

**Est. number of SLO CITY RESIDENTS served through this project \***

1333

**Total Project Cost: \***

120,000

**AMOUNT OF CITY FUNDING REQUESTED: \***

30,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

We will divide a total request of \$30,000 in grant funding between the following endeavors:

#### 1. Organizational Development Priorities

The Diversity Coalition recently established a paid Executive Director position to lead organizational growth, strategy and programming. Moving from a volunteer-only to a staffed organization requires new systems, policies and practices to magnify our effectiveness. Our current focus is increasing program impact, stabilizing funding and growing and strengthening our coalition. We believe that improving our outreach through development of marketing materials (email, website, social media, boothing, print media and mailing) will grow our coalition and increase our program participation rates.

We request \$5,000 for this task (\$3,000 for staffing organizational development as well as program effectiveness and expansion, \$2000 for outreach materials).

#### 2. Program Priorities

The Sheriff's Report on structural racism (see "equity gaps/community needs" question in the grant application) is the most comprehensive and timely look at the local need for diversity. The report concludes that education is a key action to affect change, confirming the Diversity Coalition's emphasis on educational programming for youth, the public, organizations and businesses. Our programs include:

##### School Speaker Program - Public School Students

Our School Speaker Program is free to schools and teachers and is meant to complement the amazing work done by educators by bringing renowned diversity speakers to the classroom to share their unique and compelling experiences. During the next year we will expand to one new school district (Paso Robles Joint Unified School District) and will augment our speaker network with local speakers to reduce our speaker costs, increase our impact, and showcase local diversity.

We request \$15,000 to support speaker fees and directly sponsor 10 speakers, reaching 1000 students.

##### Fostering Understanding in Our Community - General Public

Building on our School Speaker program, we connect the community with our outstanding speakers and panelists through public presentations. Speakers tell their stories and engage with audiences around their personal experience of and triumph over discrimination, inspiring new thinking, tolerance, and understanding in our audience. Over the next year we will increase the frequency of our presentations and our reach, through marketing investments.

We request \$2,500 to pay for staff time to organize 3 events, as well as offset event costs (venue rental, printing, marketing).

##### DEI Training - Organizations, Businesses and Individuals

Many individuals, organizations and businesses would like to become allies of diversity, aligning their organizational structures, policies, practices, personal knowledge and behaviors with their belief in equality. There is a great need for a locally-based Diversity, Equity and Inclusion related training to teach this willing audience and leverage their enthusiasm into action, creating tangible changes in our community. This effort will also help grow and strengthen our coalition. We are taking steps to develop an impactful, affordable, self-sustaining program that fills this local need and expect to pilot the program within the next year.

We request \$6,000 to support staff time to develop this program and host the pilot trainings, as well as \$1,500 for material costs, including curriculum, program promotion.

##### Local Collaborative Leadership

We amplify the voices and experiences of our coalition by staying involved with local diversity efforts, including our affiliated organizations, the Sheriff's Office Unity Committee, and the different DEI governmental efforts. The projects we engage with prioritize the creation of opportunities for disadvantaged populations, encourage institutions to foster pathways to leadership for people of color, DEI grant funding, and the devotion of resources to celebrate diversity. One example of our collaborative is led by the City of SLO, where our organization is collaborating with RACE Matters SLO, SLO Climate Coalition, Ecologistics and EcoSLO. This collaborative has applied for a state grant that could result in the creation of resilience hubs amongst other opportunities.

No funding is currently requested for this activity, but funding for organizational capacity building and programming will support these efforts.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

The Diversity Coalition’s objective is to serve the entire county and be based here in the City of San Luis Obispo. Some of our partners include RACE Matters, NAACP San Luis Obispo, GALA Pride and Diversity Center, Stand Strong, Bend the Arc, 5 Cities Hope, Congregation Beth David, JCC Federation, Tranz Central Coast, San Luis Obispo Police, Peace Academy San Luis Obispo, and Restorative Partners. We offer Community Outreach meetings with world-renowned speakers regularly and have had several hundreds of community members attend each of our most recent programs, which have been held via Zoom during the COVID-19 pandemic. In terms of direct educational programs, we currently provide programs to San Luis Coastal, Lucia Mar Unified, and Paso Robles Joint Unified School District middle school and high school students. Our goal is to expand our program service delivery to encompass all school districts in the county.

**Describe the equity gaps and community needs this project will address.**

The lack of compelling and inclusive Diversity education in our community impacts the safety and wellbeing of SLO County residents, manifesting covertly (through systemic racism and microaggressions) and overtly (as hate crimes). In 2021 the SLO Sheriff’s Office released a report about systemic racism. The report, endorsed by local equity organizations including the Diversity Coalition, studied local demographics to identify examples of systemic racism. It found overrepresentation of white people in positions of privilege (business ownership, political office, etc) and overrepresentation of people of color in positions of inequality (educational attainment, income, homelessness, incarceration). For instance, 100% of the SLO County District Attorneys since 1979, 100% of recent SLO City mayors, 100% of SLO Sheriffs since 1864, and 100% of Cal Poly presidents since the university’s founding have been white. The background and lived experiences of people in these influential positions affect the policies and practices of their institutions, perpetuating opportunities for whites and intentional or unintentional bias against people of color. In contrast, people of color tend to have lower earnings (25% less than white households), higher rates of school expulsion, incarceration and homelessness disproportionate to SLO county’s demographic makeup. These inequities result from structural bias in our economic, social and political systems. While overtly racist acts are generally condemned, hidden systemic discrimination occupies a blind spot in popular consciousness and the impact directly harms human health, happiness and safety.

The need in SLO County to address systemic inequities does not only come from within, but also from how we compare among our peers. A 2020 CA Attorney General report ranked SLO County as #1 in hate crimes per capita against Asians, more than twice as prevalent as in any other county in the state. And in 2021, SLO County ranked #1 on the Central Coast for hate crimes with a total of 12 vs. only 5 in more populous Santa Barbara County.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIFOC serving on public boards, committees	Example: 10% increase by end of 2021
Total supporting members for Diversity Coalition	1500 (25% increase over mid-2022 membership)
Example : # of BIFOC serving on public boards, committees	Example: 10% increase by end of 2021
Number of students reached with School Speakers	3600 (increase of 1/3rd by over 2021-22 school year)
Example : # of BIFOC serving on public boards, committees	Example: 10% increase by end of 2021
Number of Fostering Understanding Events	6 reaching 300 audience members (increase of 200% over 2021-2022)
Example : # of BIFOC serving on public boards, committees	Example: 10% increase by end of 2021
Number of organizations that receive DEI training pilot program	2

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner

Example: ABC Business

San Luis Coast Unified, Lucia Mar, and Paso Robles Joint Unified School District

Example: ABC Business

INSIDE OUT WISDOM + ACTION PROJECT

Example: ABC Business

Example: ABC Business

Example: ABC Business

Example: ABC Business

Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes

Partners to host diversity speakers in classrooms

Example: Free Use of Space for Weekend Classes

Provides DEI facilitator training and curriculum

Example: Free Use of Space for Weekend Classes

Example: Free Use of Space for Weekend Classes

Example: Free Use of Space for Weekend Classes

Example: Free Use of Space for Weekend Classes

Provide the timeline for this proposed project.

Sept 2022 - June 2023

- + host 20 School Speakers in three school districts (average of one speaker every two weeks)
- + host 6 Fostering Understanding community forums (average of one per two months)

Sept 2022 - Feb 2023

- + develop DEI training (buy curriculum, train two staff, develop program content and promotional materials)
- + develop outreach materials for the Diversity Coalition to increase membership engagement (update website, social media, print materials, mailing campaign, boothing materials)

Mar - July 2023

- + pilot two DEI trainings (recruit two organizations, host trainings, conduct evaluation followups)
- + conduct outreach at community events to grow Diversity Coalition membership and increase engagement, volunteer recruitment, and public visibility of educational resources and events

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

All of the efforts of this grant are financially self-sustaining while compounding the impact of our mission. By building our outreach capacity we not only link our members and community with valuable events, training and resources, we also enable them to support our organization financially. With a supporting membership of 1500 (our goal for this grant), we will generate stabilizing support to fund our organization's basic operations.

The development costs of the DEI training program are one-time expenses for curriculum and facilitator training. The training program will be developed with the goal of becoming self-sustaining through a fee-for-service and/or recommended donations financial model that will cover the operational costs of staffing, venue fees, food, materials, insurance and any other overhead to run the program.

Overall, the DCSLOC has established a long history of fundraising success, beginning in 2011, developing partnerships with local businesses, individuals and grantors, including PG&E, the Cities of Arroyo Grande, Pismo, San Luis Obispo and Morro Bay. We also retain a grant writer who will pursue all funding necessary to develop these programs and cover any gaps in funding once they are established.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Organizational Development - Staffing	\$ 20,000.00	\$ 3,000.00	\$ 17,000.00

2	Organizational Development - Outreach Materials	\$ 5,000.00	\$ 2,000.00	\$ 3,000.00
3	School Speaker Program	\$ 50,000.00	\$ 15,000.00	\$ 35,000.00
4	Fostering Understanding Program	\$ 10,000.00	\$ 2,500.00	\$ 7,500.00
5	DEI Training Program - Staffing	\$ 20,000.00	\$ 6,000.00	\$ 14,000.00
6	DEI Training Program - Materials	\$ 5,000.00	\$ 1,500.00	\$ 3,500.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY

### Describe the plan for promoting this project within the City of San Luis Obispo.

We promote our programmings in the following ways:

School Speaker Program - We use our existing connections within the schools to provide information about the program to school teachers, meet with them individually to support classroom integration and scheduling, and coordinate by email. We aim to reach about 1000 students in the San Luis Coastal Unified School district.

Fostering Understanding, our speaker series, is promoted through print fliers, emailings, and on social media--we have extensive reach through our Coalition affiliates.

DEI Trainings will be promoted to our members first during the pilot phase, and then broadcast as an opportunity for the wider community as we refine the program and increase capacity.

### How will you highlight the City's support of your project?

Logo on Website

Posts on Instagram (1900 followers) and Facebook (1600 followers)

Including SLO City Logo on all promotional materials created with the project funding (including outreach materials and DEI training materials)

Mention in newsletter

Mention in media interviews

## PART 5: CERTIFICATION

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Greg Ellis

### Signature \*



### Title: \*

Grant Manager

### Date: \*

8/26/2022

## **The Diversity Coalition of San Luis Obispo County | Board of Directors**

*August 16th, 2022*

### **Cornel N. Morton - President**

Cornel N. Morton, Ph.D. is Cal Poly, San Luis Obispo Vice President for Student Affairs, Emeritus. He has served as a consultant to public and private organizations in areas including diversity awareness, student success, inclusivity, strategic planning, team building and conflict mediation.

His community service includes membership on the French Hospital Community Board, Board Member of the Martin Luther King Jr. Scholarship Committee and Life Long Learners of the Central Coast Advisory Board. Cornel lives in San Luis Obispo County.

### **Jean DeCosta - Secretary**

Jean DeCosta, Ph.D., retired from Cal Poly, Dean of Students, Emeritus. Jean's background is as an educator, administrator, organizational consultant and trainer. Jean has provided consulting to public and private organizations in the areas of conflict resolution, communication, strategic problem solving, and team development. Jean has worked in private practice as a clinical therapist and trained as a conflict mediator. Jean holds a doctorate in Organizational Systems, an M.S. in Education, and was a licensed clinical Marriage, Family Therapist. Jean lives in SLO county.

### **Jane Rowland - Treasurer**

Jane Rowland is a Registered Nurse with 41 years of professional experience in health care. She holds a Bachelor of Science in Nursing from University of California, San Francisco, and a Masters in Nursing from UCLA. She has worked in various settings including direct patient care, education, and administration. In all her endeavors she strove to incorporate effective means of interacting with patients, family, and staff by recognizing each person's individual needs, and being respectful of the diversity of needs presented by different populations.

Jane's volunteer activities include work with Life Long Learners of the Central Coast and the American Heart Association. She is a past president of the American Heart Association San Luis Obispo division, and represented that organization on the California Affiliate board of the AHA. She lives in Nipomo with her husband and rescue dog.

### **Michael Boyer - Founding Director, Past-President & Membership Chair**

Michael has been a business and community leader in San Luis Obispo County for over 20 years with continued business involvement in Epic Entertainment, Doc Burnstein's, and Pismo Beach Homes.

Michael is the CEO of the Boys & Girls Clubs of Mid Central Coast, which serves thousands of children who need us most from Orcutt to San Miguel. Serving kids every day in Atascadero, Guadalupe, Paso Robles, Santa Maria, and Shandon to three priority outcomes: Academic Success, Good Character & Citizenship, and Healthy Lifestyles.

Michael is committed to the community through his board involvement as the Chair of Stand Strong, a Director at Arroyo Grande Community Hospital Foundation, a past Director at Big Brothers Big Sisters, a Director at The Rotary Club of Pismo Beach, a past Director at San Luis Obispo YMCA, a Director at Diversity Coalition & a past Director at St. Patrick School Board. Michael lives in Arroyo Grande, CA.

## **The Diversity Coalition of San Luis Obispo County | Board of Directors**

*August 16th, 2022*

### **Kathleen Minck - Education Chair and Director**

Kathleen taught at the Lucia Mar school district for 32 years. Promoting tolerance for diversity and teaching about our different cultural experiences were always passions of hers. She sat on her district's Wellness Committee and was her school's Bully Prevention Coordinator. CTA (Cal. Teachers Association) awarded her their Peace and Justice Human Rights award for the work she did at her school and throughout her district, partnering with the Canadian organization, Free the Children, and Heifer International, among others. She continued her passion in her travels as well, helping to build a school in Kenya, and studying health and education concerns with Witness for Peace and SOA Watch in Venezuela and Cuba. As an advocate for unions, she was her school's LMUTA union rep and sat on their board, and was the Human Rights contact person for CTA's local service center. She was also elected to CTA's State Council, sitting on the Civil Rights in Education committee, and to the NEA National Assembly.

Kathleen retired from teaching in 2015 and currently volunteers for Wilshire Hospice, Teddy Bear Foundation at Cottage Hospital, and Human Rights Watch. She resides in Arroyo Grande.

### **Kendra Paulding - Marketing Chair and Director**

Kendra Paulding, a Cal Poly SLO graduate, has a Bachelor of Science degree in Business Finance. Formerly a financial advisor at Morgan Stanley, Kendra now manages the office at Paulding Law with her husband, Jimmy Paulding. She lives in Arroyo Grande.

### **Joe Whitaker - Director**

Joe Whitaker, a retired businessman, is a former senior marketing executive at Mattel Toys, Columbia Pictures and Lorimar Productions. During his career, he also acted as an independent marketing consultant to small and mid-size children's product and entertainment firms.

Joe is also a long-time member of SLO SCORE, the local chapter of the national SCORE small business counseling service. He has resided in Cypress Ridge since 2006.

### **Rita Casaverde - Executive Director**

Rita Casaverde was born and raised in Lima, Peru and moved to California in 2012. In Peru, Rita received the Green Youth award by the United Nations. This award recognized her conservation work with communities in the Andes of Peru where she helped protect an endemic forest and multiple watersheds.

After moving to California, Rita had the opportunity to build a career in the Tech industry as a Product Manager, but after eight years working for local tech companies, she decided to join the office of Congressman Salud Carbajal to streamline her passions. In 2020, Rita and other community leaders helped found SLO County UndocuSupport with the goal of financially supporting immigrant families during the COVID-19 pandemic.

Rita joined the Diversity Coalition as Executive Director in 2022.



INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 09 2018**

FIVE CITE DIVERSITY COALITION  
1145 STONECREST DRIVE  
ARROYO GRANDE, CA 93420-0000

Employer Identification Number:  
82-2075135  
DLN:  
26053618007978  
Contact Person:  
CUSTOMER SERVICE ID# 31954  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990/990-EZ/990-N Required:  
Yes  
Effective Date of Exemption:  
June 15, 2017  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.



Exhibit B

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/5/2022 | 1:36 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and San Luis Obispo Hillel (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to Jews of Color: Intersecting Identities, Intersecting Struggles as submitted in its application to the CITY on August 31, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$10,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

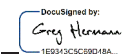
San Luis Obispo Hillel  
1 East Grand Ave.  
Box 88  
San Luis Obispo, CA 93407  
lauren.bandari@slohillel.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
9271DC774EB6108...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E93A3C5C8BD18A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
19592B18C87B15D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

Exh. A

## 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

### PART 1: APPLICANT INFORMATION

**Organization Name: \***

San Luis Obispo Hillel

**Year Established: \***

1970

**Fiscal Agent, if different than above: \***

SLO Hillel is its own 501c3, but is affiliated with Hillel International

**Tax ID #: \***

521844823

**Document Certifying Federal Tax-Exempt status, if applicable**

Exemption 9.17.98.pdf

2.08MB

**Name of Executive Director (or highest leadership position)**

Lauren Bandari

**Approximate Annual Budget:**

150,000

**Major Sources of Funding:**

Individual Donors and Board Members (Cal Poly Alum), Hillel International grants, Jewish Agency grant

**Mission Statement:**

San Luis Obispo Hillel is the center-point of Jewish life at Cal Poly and in the San Luis Obispo Community. We provide a welcoming and supportive environment, so our students can be proud of and engaged with their Jewish heritage. We raise awareness on campus of the significance of our Jewish heritage and values. Through career-based and community-service programs, social and cultural events, and gatherings, SLO Hillel brings Jewish students and the entire community together to enrich lives.

**Number of paid staff (full- or part-time):**

2

**Number of volunteers:**

20

**Name of Board President or Chair:**

Micah Dekofsky

**Organizational Leadership Chart \***

Organizational Structure.pdf

84.18KB

**Name of Person completing this Application:**

Lauren Bandari

**Organization Mailing Address: \***

Street Address

1 East Grand Ave

Address Line 2

Box 88

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93407

Country

USA

**Phone: \***

(805) 295-0890

**E-mail: \***

lauren.bandari@slohillel.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

San Luis Obispo Hillel is the center-point of Jewish life at Cal Poly and serves the entire San Luis Obispo community. We raise awareness on campus of the significance of our Jewish heritage, culture and values to our diverse, yet shared Jewish identity. Through career-based and community-service programs, as well as our social and cultural events, SLO Hillel brings Jewish students and the community together to enrich lives.

San Luis Obispo Hillel strives to be pluralistic and diverse through new programming. Events include hiking, music and bonfires, on-campus BBQs, off-campus retreats, wellness activities, seminars with diverse and intriguing speakers, and dinners with other cultural and religious groups, building connections and unity on campus and throughout the community.

From 1970-2018, the organization was entirely student run. Currently, San Luis Obispo Hillel has an Executive Director, Lauren Bandari, and an Israeli fellow, Lidar Eini, who manage day to day operations and outreach, expanding the scope and overall reach of the organization.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

At face value, San Luis Obispo Hillel supports Jewish young adults on campus and in the broader San Luis Obispo community, but on a deeper level, we support the education of the entire community on the diversity and richness of Jewish culture, history and traditions. Inclusion can come only through outreach, awareness and relationship building, and San Luis Obispo Hillel is thrilled to be at the forefront of campus and community DEI efforts.

**PART 2: PROJECT INFORMATION****Name of DE&I Project \***

Jews of Color: Intersecting Identities, Intersecting Struggles

**Est. number of people served through this project: \***

800

**Est. number of SLO CITY RESIDENTS served through this project \***

650

**Total Project Cost: \***

34,700

**AMOUNT OF CITY FUNDING REQUESTED: \***

20,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

San Luis Obispo Hillel is seeking grant funding to host a keynote speaker for its Jewish Festival of Learning. The speaker (TBD) would be a well-renowned Jewish person of color – someone of the caliber of Tracee Ellis Ross or Rain Pryor – who can speak to the diversity of the Jewish identity and experience, as well as the shared social struggles that we face. This dynamic speaker will highlight how the historic Jewish commitment to civil rights and racial justice has continued into the 21st century, and provide thought-provoking new insights into the ongoing conversations of race, ethnicity and identity, with a particular focus on the relationship between antisemitism and systemic racism in today's world. It is our hope that participants will develop the knowledge and skills to recognize and challenge antisemitism and all forms of racial and ethnic hatred, wherever they see it, in our community and beyond.

The speaking event would be a special feature presentation of the 2023 Jewish Festival of Learning, a community-wide celebration of Jewish life and education on antisemitism for the Central Coast. This event occurs at the end of January/early February, coinciding with International Holocaust Remembrance Day. The Jewish Festival of Learning features a diverse range of authors, scholars, podcasters, and other luminaries, and has been well-attended in past years, reaching around 800 participants during the 2022 event.

One of the four Major City Goals is the commitment to making San Luis Obispo a more welcoming, equitable, and inclusive city for all. It's critical that we educate ourselves and our community on the complexity of the Jewish identity to fully deliver on this Major City Goal, and truly "enhance the sense of belonging for all people in our community." We're all in this together, and antisemitism is still present today in part because of a failure of our society to reflect upon the tragedies caused by antisemitism in the past and to say "never again" – both to antisemitism specifically, and to racism in general. A speaker who has experienced antisemitism and racism based on the color of their skin would be able to speak to the impact of both and share how these experiences are interconnected. Through educational opportunities like this, we can target its root cause, and make our community and world more inclusive.

San Luis Obispo Hillel believes that a dynamic speaker who is a Jew of color would be the best mouthpiece to deliver this message to the San Luis Obispo community and enlighten our residents to the diversity of the Jewish identity, and how this perspective and understanding can fit into existing DEI efforts by deconstructing harmful stereotypes, and fighting back against antisemitism and other forms of racism have impacted generations of diverse peoples.

We believe that we can attract an audience of around 750 people, but that the presentation's powerful impact will resonate throughout the community and beyond.

It is important to note that this keynote program will NOT be a religious program or feature religious practices of any kind, in accordance with the guidelines of this grant.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

This speaker event (and eventual series) will be free and open to the public, with a target audience of San Luis Obispo residents (of all ages). The event will be hosted at the Fremont Theatre or a similar sized venue that is easily accessible to all residents.

**Describe the equity gaps and community needs this project will address.**

To the average person, the perception of Jewish identity is “whitewashed” and generalized, and the rich diversity of Jewish identity is often overlooked.

Just as the Black community is not a monolith, the same is true for the Jewish community, and both share a unique history of racial oppression in this country and others. Jewish people descend from ancient communities in Ethiopia, India, and China, and today with increasing numbers of interracial marriages, some experts estimate that up to 15 percent of American Jews are Jews of color.

Yet even those perceived as “white” Jews understand that their privilege ends at the point where antisemitism begins. Many define the Jewish identity solely in religious terms, but Jews are more than just a religious group and the racism they face is much more surface level than their beliefs. Historically, Jews have been designated as “a people apart”; Jews were, and continue to be, characterized as distinct or different, and as a result, they have been plagued with racism throughout their 4000-year history – racism that has ultimately led to oppression and genocide in the last century, and a legacy of antisemitism.

We would like to bring this issue to light through the perspective of a diverse, charismatic speaker, who is both ethnically Jewish and a person of color, and frame it within the broader DEI context of denouncing all forms of racism.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Number of Keynote Presentation Attendees	Goal: 500-800
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
Survey Responses Showing Favorable Impact	Goal: Net Promoter Score of 50-70
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
"Yes" Responses in Post-Event Survey to the Question “Did this speaker change your perspective?”	Goal: 70%

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner	Activity/Service They Provide for This Project
Example: ABCBusiness	Example: Free Use of Space for Weekend Classes
JCC Federation	Financial Support, Outreach
Example: ABCBusiness	Example: Free Use of Space for Weekend Classes
AEPi	Financial Support, Outreach

Provide the timeline for this proposed project.

October – November 2022: Planning/Logistics; Initial Promotion

December 2022 – January 2023: Early Promotion Continues; Media Blitz to all local and regional outlets

Late January/Early February 2023: Paid Social Promotion Begins (Facebook/Instagram Ads); Event Execution

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

Ultimately, the goal is for this presentation to become an annual series, so that the community can hear from diverse perspectives. We would continue the momentum by working with other organizations that are looking to achieve a similar end goal (Anti-Defamation League, NAACP, Jews of Color, etc). However, we believe the City’s support and endorsement of this special keynote presentation will help it become recognized as a community event.



## PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Speaker Honorarium (Additional funds covered by JCC Federation - SLO or SLO Hillel)	\$ 30,000.00	\$ 20,000.00	\$ 10,000.00
2 Speaker Travel Costs (Additional funds covered by JCC Federation - SLO or SLO Hillel)	\$ 1,500.00	\$ 0.00	\$ 1,500.00
3 Paid Social Media Advertising (Additional funds covered by JCC Federation - SLO or SLO Hillel)	\$ 1,000.00	\$ 0.00	\$ 1,000.00
4 Private Event Security (Additional funds covered by JCC Federation - SLO or SLO Hillel)	\$ 1,000.00	\$ 0.00	\$ 1,000.00
5 Photographer & Videographer (Additional funds covered by JCC Federation - SLO or SLO Hillel)	\$ 1,200.00	\$ 0.00	\$ 1,200.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY



**Describe the plan for promoting this project within the City of San Luis Obispo.**

We plan to advertise the event through traditional means and social media advertising:

- Posters and other direct outreach to frequented venues throughout the City, Cal Poly and Cuesta College
- Communications sent to high school teachers and college (Cal Poly/Cuesta College) professors to share with their students
- Communications sent to local DEI groups (to reach diverse audiences) and SLO-based community groups
- Local media blitz and press releases
- Targeted Facebook and Instagram ad campaigns focused on the City of San Luis Obispo, as well as Cal Poly, and Cuesta College

**How will you highlight the City's support of your project?**

All advertisements for the presentation would feature a prominent "Sponsored by" mention with the City of San Luis Obispo Office of Diversity, Equity & Inclusion, and highlight the grant funding. The emcee introducing the speaker would provide meaningful recognition during their introduction and the speaker would be asked to do the same. Lastly, the digital program for the event would also recognize the City's support.

## PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person completing this Application: \***

Lauren Bandari

**Signature \***

A rectangular box containing a handwritten signature in cursive script that reads "Lauren Bandari".

**Title: \***

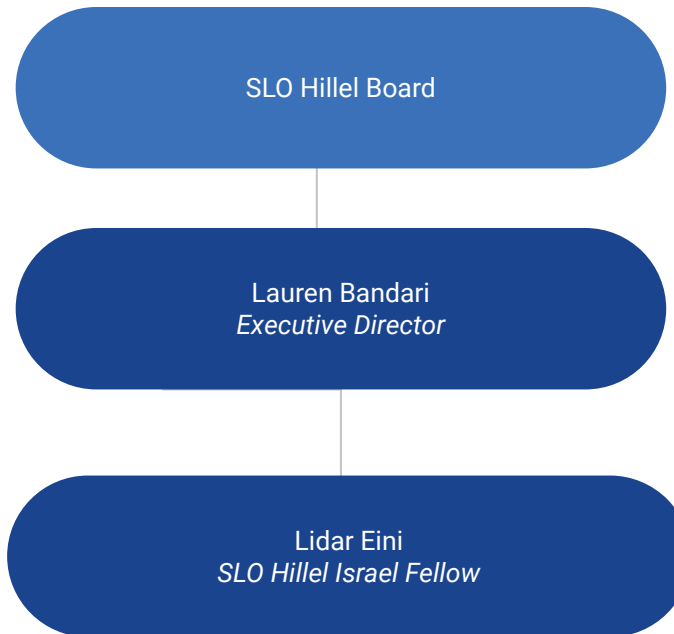
Executive Director

**Date: \***

8/31/2022



## Organizational Structure



INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

SEP 17 1998

THE FOUNDATION FOR JEWISH CAMPUS  
LIFE  
C/O ARYEH FURST  
1640 RHODE ISLAND AVE NW  
WASHINGTON, DC 20036-3278

Employer Identification Number:  
52-1844823

DLN:  
17053220762038

Contact Person:  
D. A. DOWNING  
Contact Telephone Number:  
(513) 241-5199

Our Letter Dated:  
December 1993  
Addendum Applies:  
No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

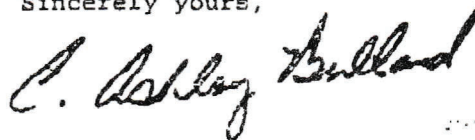
Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



District Director

Letter 1050 (DO/CG)

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
31 HOPKINS PLAZA  
BALTIMORE, MD 21201

DEPARTMENT OF THE TREASURY

Date: 1/10/94

THE FOUNDATION FOR JEWISH CAMPUS  
LIFE  
1640 RHODE ISLAND AVENUE NW  
WASHINGTON, DC 20036

Employer Identification Number:  
52-1844823  
Case Number:  
523348047  
Contact Person:  
EP/EO CUSTOMER SERVICE UNIT  
Contact Telephone Number:  
(410) 962-6058  
Accounting Period Ending:  
June 30  
Foundation Status Classification:  
509(a)(1)  
Advance Ruling Period Begins:  
September 29, 1993  
Advance Ruling Period Ends:  
June 30, 1998  
Addendum Applies:  
Yes

Dear Applicant:

Based on information you supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably expect to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, during an advance ruling period you will be treated as a publicly supported organization, and not as a private foundation. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must send us the information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, we will classify you as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, we will classify you as a private foundation for future periods. Also, if we classify you as a private foundation, we will treat you as a private foundation from your beginning date for purposes of section 507(d) and 4940.

Grantors and contributors may rely on our determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you send us the required information within the 90 days, grantors and contributors may continue to rely on the advance determination until we make a final determination of your foundation status.

If we publish a notice in the Internal Revenue Bulletin stating that we

Letter 1045 (DD/CG)



## THE FOUNDATION FOR JEWISH CAMPUS

will no longer treat you as a publicly supported organization, grantors and contributors may not rely on this determination after the date we publish the notice. In addition, if you lose your status as a publicly supported organization, and a grantor or contributor was responsible for, or was aware of, the act or failure to act, that resulted in your loss of such status, that person may not rely on this determination from the date of the act or failure to act. Also, if a grantor or contributor learned that we had given notice that you would be removed from classification as a publicly supported organization, then that person may not rely on this determination as of the date he or she acquired such knowledge.

If you change your sources of support, your purposes, character, or method of operation, please let us know so we can consider the effect of the change on your exempt status and foundation status. If you amend your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, let us know all changes in your name or address.

As of January 1, 1984, you are liable for social security taxes under the Federal Insurance Contributions Act on amounts of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the private foundation excise taxes under Chapter 42 of the Internal Revenue Code. However, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Internal Revenue Code. Bequests, legacies, devises, transfers, or gifts to you or for your 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.

Donors may deduct contributions to you only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, gives guidelines regarding when taxpayers may deduct payments for admission to, or other participation in, fundraising activities for charity.

You are not required to file Form 990, Return of Organization Exempt From Income Tax, if your gross receipts each year are normally \$25,000 or less. If you receive a Form 990 package in the mail, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return.

If you are required to file a return you must file it by the 15th day of the fifth month after the end of your annual accounting period. We charge a penalty of \$10 a day when a return is filed late, unless there is reasonable

Letter 1045 (DO/CG)

-3-

THE FOUNDATION FOR JEWISH CAMPUS

cause for the delay. However, the maximum penalty we charge cannot exceed \$5,000 or 5 percent of your gross receipts for the year, whichever is less. We may also charge this penalty if a return is not complete. So, please be sure your return is complete before you file it.

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

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, we will assign a number to you and advise you of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.


If we said in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help us resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

We have sent a copy of this letter to your representative as indicated in your power of attorney.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

  
District Director

Enclosure(s):  
Addendum  
Form 872-C

Letter 1045 (DO/CG)

**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

Manager, (ghermann@slocity.org)

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City



**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/5/2022 | 1:37 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and San Luis Obispo International Film Festival, Inc. (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to Free Short Film Program Highlighting BIPOC filmmakers as submitted in its application to the CITY on August 31, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$6900, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

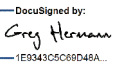
San Luis Obispo International Film Festival, Inc.  
PO BOX 1449  
San Luis Obispo, CA 93406  
skye@slofilmfest.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
07A7A2C97C4B418...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E9343C5C6B048A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
49590B18C87B45D...  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

Exh. A

## 2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

### PART 1: APPLICANT INFORMATION



**Organization Name: \***

San Luis Obispo International Film Festival, INC.

**Year Established: \***

1993

**Fiscal Agent, if different than above: \***

n/a

**Tax ID #: \***

770367414

**Document Certifying Federal Tax-Exempt status, if applicable**

SLOIFF IRS Tax Exempt Letter.pdf

13.63KB

**Name of Executive Director (or highest leadership position)**

Skye McLennan

**Approximate Annual Budget:**

300,000

**Major Sources of Funding:**

Sponsorship and grants

**Mission Statement:**

To expand minds, open hearts, and entertain people through worldwide independent cinema.

**Number of paid staff (full- or part-time):**

3

**Number of volunteers:**

300

**Name of Board President or Chair:**

Paul Metchik

**Organizational Leadership Chart \***

organizationalstructure.pdf

96.59KB

**Name of Person completing this Application:**

Skye McLennan

**Organization Mailing Address: \***

Street Address

PO BOX 1449

Address Line 2

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93406

Country

USA

**Phone: \***

805

**E-mail: \***

skye@slofilmfest.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

We aim to provide a year-round destination for international independent cinema, promoting diversity, understanding, education, and inclusion through engaging storytelling. Our world-class annual festival held in April in San Luis Obispo County, along with events throughout the year, provide a venue for international and local filmmakers, exposing an ever-expanding range of audiences to new ideas and experiences.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

We primarily serve the City of San Luis Obispo. We serve a wide range of audiences with the majority of our audience being local San Luis Obispo residents in the 55+ age range. Over the years we have expanded our festival into North and South counties and continue to involve Cal Poly university. We attract a diverse group of filmmakers from around the world and continue to nurture the local filmmaking community. Because of our diverse range of programming, we attract audiences from surfers to foodies to passionate climate warriors. We have specific initiatives this year to increase diversity behind and in front of the camera, this means highlighting women, people of color, queer and disability stories within in our programming.

**PART 2: PROJECT INFORMATION****Name of DE&I Project \***

Free Short Film Program Highlighting BIPOC filmmakers (Name subject to change on final theme)

**Est. number of people served through this project: \***

1000

**Est. number of SLO CITY RESIDENTS served through this project \***

1000

**Total Project Cost: \***

6,900

**AMOUNT OF CITY FUNDING REQUESTED: \***

6,900

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

In our 2023 hybrid film festival, we would like to continue our third year offering a free program that highlights films and storytelling from BIPOC filmmakers. We have partnered with R.A.C.E Matters SLO to help program the films and facilitate the screenings. We would like to request \$6,800 which would cover production, marketing, screening, filmmaker, and speaker costs. It is important for us to pay all our speakers and offer the event for free to the community. We believe in the power of film in helping develop change within our community.

A series of five short films (a mixture of documentary and narrative) programmed by R.A.C.E Matters SLO focusing on BIPOC filmmakers and differing perspectives. Last year's theme was "Make Your Move: Short films about movement — moving through life, moving us forward." The films would be screened in-person during the festival (April 25-30) with a brunch mixer with the filmmakers and vendor market. The films would then screen on our virtual platform the following week. (April 30 - May 7)

The program would be free to all community members who register. Access would be across the state of California but promoted locally with the hopes to reach a diverse and large audience. The program would also include one to two panel discussions with notable guest speakers. Past discussions have included: "The Power of Media to Promote Social Justice" (featured local organizations and media outlets) "From the Bottom Up: Building Representation in Film" (Featuring Hollywood executives)

We also will invite the filmmakers of the selected films to visit San Luis Obispo and speak at the screenings. This year's edition had a great turnout and our first time in person, over 200 people attended. New this year would be a cash award, awarded to local BIPOC filmmakers to help support a project in the works. Project proposals would be reviewed by R.A.C.E Matters SLO and SLO Film Festival with the final film screened at the 2024 festival.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

This is an event tailored for the city of San Luis Obispo but we also hope to reach across the whole county. The in-person screening will be held at one of our venues in Downtown SLO. By removing the barrier of cost we hope the program can be accessible to a wide range of audiences. Our ability to livestream and present an online virtual cinema at our festival will make our event even more accessible. We hope to provide a platform for maragalized filmmakers to gain visibility and to continue to nurture storytelling. The purpose of this program is to increase visibility of people of color within our community. We aim to also offer storytelling that doesn't just focus on struggle but stories that celebrate culture and people.

**Describe the equity gaps and community needs this project will address.**

The SLO Film Festival has always provided diverse storytelling and brought to SLO many stories that often do not have a platform. One of the main equity gaps in San Luis Obispo is representation and through the power of film we hope to change that. We also aim to make films and panels free to view in an effort to make our event accessible. Exposure to the arts, specifically a storytelling medium like film, is vital to any community. It is a powerful mode of representation for marginalized communities. We would also like to compensate our selected filmmakers and speakers in an effort of support.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

**Methods of Evaluation**

Example : # of BIPOC serving on public boards, committees

Streaming/Virtual Views

Example : # of BIPOC serving on public boards, committees

In-Person Attendance

Example : # of BIPOC serving on public boards, committees

Demographics (Location, Age, Race)

**Indicators of Success / Measurable Outcomes**

Example: 10% increase by end of 2021

Increased from previous years 2022,2021

Example: 10% increase by end of 2021

Increase in attendance from previous years 2022, 2021

Example: 10% increase by end of 2021

5% increase of diversity across the festival

Example : # of BIPOC serving on public boards, committees

Example: 10% increase by end of 2021

Post Festival Survey

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner	Activity/Service They Provide for This Project
Example: ABC Business	Example: Free Use of Space for Weekend Classes
R.A.C.E Matters SLO	Programming and marketing support

Provide the timeline for this proposed project.

We aim to present this program in our 2023 Hybrid SLO Film Festival

Late November/December: Lock in film selections & panelists, accept project proposals for filmmaking grant.

December/January: Gather materials, writing

Feb/March: Marketing/Promotion

April: In-person screening April 25-30, virtual week after

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

Last year we did not receive funding for this program, but wanted to continue the work and we were supported by local community members to still offer the event for free. We also made a more conscious effort to make our entire program more diverse (rather than exclusionary) and this means selecting films made by often marginalized voices such as people who identify as queer, disabled or people of color. Our goal is to continue to make our festival more accessible to different audiences each year, expanding our reach and making more audiences feel welcome. Film should be accessible to all.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Speaker Fees for Panelists (\$150 each) (4 panel guests for panel)	\$ 600.00	\$ 600.00	\$ 0.00
2 Host for Panel fee (\$100 each)	\$ 200.00	\$ 200.00	\$ 0.00
3 Targeted Marketing through social media and local advertising	\$ 1,000.00	\$ 1,000.00	\$ 0.00
4 Virtual Platform Upload (\$20 per film, 5 films) + 1cent per minute viewed	\$ 1,000.00	\$ 1,000.00	\$ 0.00
5 Technical Support/Staff (For panel/Q&As)	\$ 500.00	\$ 500.00	\$ 0.00
6 Lead Programmer	\$ 600.00	\$ 600.00	\$ 0.00
7 Screening Fee (For BIPOC filmmakers(five films)) \$200 each	\$ 1,000.00	\$ 1,000.00	\$ 0.00

8	Brunch Filmmaker Mixer + Maker Market	\$ 1,000.00	\$ 1,000.00	\$ 0.00
9	Local Filmmaker Grant Award	\$ 1,000.00	\$ 1,000.00	\$ 0.00

\*During application review , you may be asked for further financial information or for proof of any matching funds

PART 4: AWARENESS AND VISIBILITY



Describe the plan for promoting this project within the City of San Luis Obispo.

How will you highlight the City's support of your project?

PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

Name of Person completing this Application: \*

Skye McLennan

Signature \*

*Skye McLennan*

Title: \*

Executive Director

Date: \*

8/31/2022



**Internal Revenue Service**

**Date:** October 4, 2007

SAN LUIS OBISPO INTERNATIONAL FILM  
FESTIVAL INC  
PO BOX 1449  
SN LUIS OBISP CA 93406-1449 497

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

**Person to Contact:**

Mr. Barker 17-56979  
Customer Service Representative

**Toll Free Telephone Number:**

877-829-5500

**Federal Identification Number:**

77-0367414

Dear Sir or Madam:

This is in response to your request of October 4, 2007, regarding your organization's tax-exempt status.

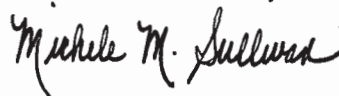
In August 1994 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under sections 509(a)(1) and 170(b)(1)(A)(vi) of the Internal Revenue Code.

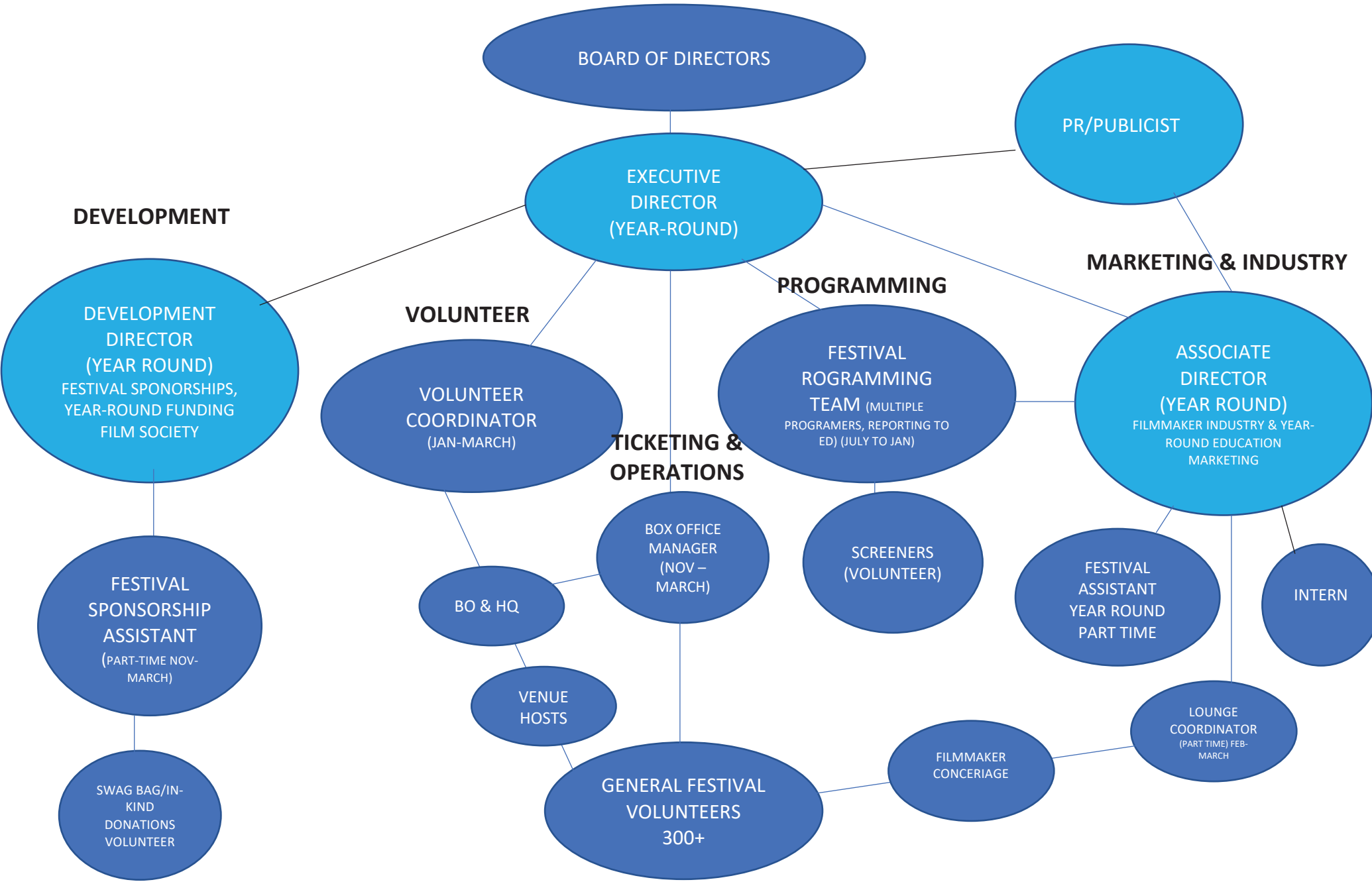
Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

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

Sincerely,



Michele M. Sullivan, Oper. Mgr.  
Accounts Management Operations 1



**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

Manager, (ghermann@slocity.org)

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/1/2022 | 3:51 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Asian American & Pacific Islanders of SLO (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to AAPI Festival as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$9,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

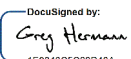
Mia Shin  
PO Box 15148  
San Luis Obispo CA 93406  
aapislocounty@gmail.com

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
Mia Shin, Executive Director

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION



**Organization Name:** \*

Asian American & Pacific Islanders of San Luis Obispo (AAPI SLO)

**Year Established:** \*

2021

**Fiscal Agent, if different than above:** \*

Ecologistics, Inc.

**Tax ID #:** \*

272116150

**Document Certifying Federal Tax-Exempt status, if applicable**

**Name of Executive Director (or highest leadership position)**

Mia Shin

**Approximate Annual Budget:**

20,000

**Major Sources of Funding:**

Grants, Donations

**Mission Statement:**

AAPI SLO raises awareness of inequities while strengthening the existing AAPI community through unifying events.

**Number of paid staff (full- or part-time):**

0

**Number of volunteers:**

5

**Name of Board President or Chair:**

**Organizational Leadership Chart** \*

AAPI SLO ORG CHART.pdf

15.78KB

**Name of Person completing this Application:**

Mia Shin

**Organization Mailing Address:** \*

Street Address

PO BOX 15148

Address Line 2

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93406

Country

United States

**Phone: \***

805-242-1124

**E-mail: \***

aapislocounty@gmail.com

**Briefly describe your organization's mission, primary activities, and operating structures.**

AAPISLO raises awareness of inequities while strengthening the existing AAPISLO community through unifying events. We hope that our work will encourage AAPISLO members (both long-standing and college students) a sense of belonging, leading to a more diverse and equitable community overall.

We aim to raise awareness through events such as rallies, educational events, and the gathering of data on AAPISLO hate incidents and crimes in the county. We also aim to strengthen the existing community by bringing together many generations and diverse sub-pockets of AAPISLO through unifying events such as annual festivals.

Since the organization's founding, we have strengthened the community in the following ways:

- Stop AAPISLO Hate Rally on April 1st, 2021 (300+ AAPISLO and allies present, including young families)
- Inaugural AAPISLO FESTIVAL on May 15th, 2022 (400+ AAPISLO and allies present, including an invitation to Paso People's Action director Yessenia Echevarria to speak)
- Speaking at SLO High School AAPISLO club - Empowering Others Through Representation
- Asked to speak at Cuesta's AAPISLO awareness event
- Helping AAPISLO Fraternity Omega Xi Delta with fundraising (to create intergenerational unity)
- Support local businesses such as the Oriental Market, @Bitesa (Vietnamese), DeBu in Pismo (Filipino), Baht (Thai), Bing's Bao (Chinese/ Korean), BapJo (Korean) Tess's Jewelry (Vietnamese), as well as many other invitations (20+) other businesses who could not participate because of Covid worker shortages.
- Networked with dentists and counselors/ therapists of AAPISLO descent (Donor)
- Spoken/ attended events hosted by other POC non-profits such as Paso People's Action and RACE Matters SLO
- PAC - currently a member of the SLO Police Advisory Committee
- PSS - Public Safety Slo speaking engagement
- Meetings with local AAPISLO professors from Cal Poly and Hancock College

Major decisions are made collaboratively by co-founders Mia Shin (Cal Poly Alumna and 20 year resident of SLO) and Kaela Lee (Cal Poly Alumna and currently residing in Oakland). Operating support is provided by the interns.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

We aim to serve the approximately 10,000 - 12,000 AAPISLO community members of San Luis Obispo County (2021 census estimates).

Of those 10,000-12,000 members are  
 long-time residents,  
 college students (Cal Poly and Cuesta),  
 high school students,  
 young families, and  
 young professionals.

**PART 2: PROJECT INFORMATION**



**Name of DE&I Project \***

AAPL SLO: Celebrate and Empower

**Est. number of people served through this project: \***

10000

**Est. number of SLO CITY RESIDENTS served through this project \***

5000

**Total Project Cost: \***

19,060

**AMOUNT OF CITY FUNDING REQUESTED: \***

15,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

Celebrate and Empower.

1. Empower: The development of hate incidents (including, but not limited to hate crimes) reporting system, in collaboration with Public Safety Slo, for a safe and anonymous way to report by members of the community -- no such system exists currently -- which will then be logged with available statistics open to the community.
2. Celebrate: Annual Festival to bring together business owners, professionals, families, college students, artists, performers, leaders of AAPL heritage. Small business grants will be given to bypass participation fees, which are difficult to procure. AAPL clubs (high school and colleges) can use the event to fundraise and to represent. Donors will be able to promote their businesses while giving back to the community.
3. Empower: Documentary highlighting the AAPL experience in SLO County, focusing in on Slo city (due to large presence of college students). The telling of stories can create a sense of belonging and value. Some people/ stories may be kept anonymous.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

1. Hate incident reporting will support the 10,000 to 12,000 AAPL members of Slo County (2021 Census estimate numbers, not including those who identify as part-Asian.)
2. Annual Festival will support not just the AAPL members but will educate non-AAPL community members through the strategic placing of the event in a high-traffic public space such as the SLO Public Market. Estimated direct impact to 500-800 community members. Including social media and continued exposure through stories covered by social media and local media outlets, the potential impact could be close to 3,000 (roughly 25% of the total AAPL population in SLO County).
3. Documentary will potentially impact 6,000 college students, as they will be highlighted on their experiences and how those experiences affect many decisions to leave SLO after graduation. It will also highlight the experiences of long-time residents and how their presence creates the diversity we all strive to bring to SLO County.

**Describe the equity gaps and community needs this project will address.**

1. The Hate incident reporting project will give voice to the many AAPL members who are simply afraid of retaliation or systems of power that make light of their lived experiences. To provide an avenue of being heard and of gathering tangible data will help bring a sense of safety and belonging. This data can then be shared with other organizations, especially those in city leadership, to help better serve the AAPL community.
2. The Annual Festival will provide a way for the small pockets of diverse AAPL communities -- Vietnamese, Filipino, Korean, Chinese, Taiwanese, Japanese, etc., to come together in one space and feel a sense of belonging. They can also use the space to network and to connect more closely with community members, especially the college students, whose continued presence after graduation can create the diversity and unity we long to see here in SLO.
3. The documentary will give voice to a community whose voice is often silence or ignored while at the same time, bring a much needed story to those who are convinced that the micro-aggressions and continual hate incidents do not exist in this community.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

#### Methods of Evaluation

Example : # of BIFOC serving on public boards, committees

Number of hate incident reports submitted via Facebook and Insta links

Example : # of BIFOC serving on public boards, committees

Annual Festival Participation

Example : # of BIFOC serving on public boards, committees

Documentary

#### Indicators of Success / Measurable Outcomes

Example: 10% increase by end of 2021

500 to 1,000 (or roughly 5% to 10% AAPI population participation)

Example: 10% increase by end of 2021

Double the number of participating organizations/ individuals representing at the festival from 2021 (20 to 40+)

Example: 10% increase by end of 2021

Documentary completion

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

#### Name of Partner

Example: ABC Business

Therapist M.T.

Example: ABC Business

Therapist C.L.

Example: ABC Business

Cal Poly AAPI clubs (Omega Xi Delta, Nissei Student Union, Korean American Student Association, Chinese Student Association, Indian Student Association, Cal Poly Lion Dance Team, etc.

Example: ABC Business

Dentists/ Doctors (they would like to remain anonymous)

Example: ABC Business

Professors from Cal Poly/ Cuesta/ Hancock

#### Activity/Service They Provide for This Project

Example: Free Use of Space for Weekend Classes

connections to local professionals for sponsorship and donations

Example: Free Use of Space for Weekend Classes

connections to avenues of collaboration with Cal Poly AAPI students on campus and local allies donations

Example: Free Use of Space for Weekend Classes

participation and promotions for all 3 projects

Example: Free Use of Space for Weekend Classes

direct sponsorship in exchange for promo

Example: Free Use of Space for Weekend Classes

educational speaking connections for events and promotion

Provide the timeline for this proposed project.

**1. Hate Incident Reporting**

Sept/Oct - set up online submission method with guidance from Stop AAPI Hate org in SF

Nov/ Dec - public announcement on social media and mainstream media channels

Jan - launch reporting platform

Feb-March - adjustments

April - upkeep and maintenance of data

May - reporting at Festival of data collected

June - Dec - continued data gathering

**2. Annual Festival (May 2023)**

Sept - secure location for festival

Oct - design implementation for artwork and related banner

Nov - Dec begin visits for business participation and sponsor lunches with community leaders

Jan/ Feb - securing vendors/ artists/ performers/ leaders/ students and

Mar/ April - gathering of materials and volunteer coordination. CONCENTRATED PROMO.

May - securing of funds and schedule

**3. Documentary (December 2023)**

Sept - reach out to AAPI Cal Poly club leaders and make announcements

Oct - social media blast seeking participants

Nov - review of applicants\

December - recorded interviews during finals week

Jan - Mar editing

April/May - secondary interviews including at the festival

May -Aug - editing

Sept - CONCENTRATED PROMO

Oct - public viewing event - fundraiser

Nov - submission to SLO FILM FEST

**Describe your plan for sustainability beyond the City's one-year award funding, if applicable.**

Donations play a major role in funding non-profits but the main roadblock is the non-existence of a unified AAPI community throughout the county, a central hub from which events, concerns, collaborations can occur. Once these sub-projects can be implemented, we can then look at sustainability through regular sponsorship/ donations.

**PART 3: PROJECT COST / BUDGET**

Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

	<b>Item Description *</b>	<b>Total Cost *</b>	<b>Amount Provided by City Funds *</b>	<b>Amount of Other Funds and Source of Funding *</b>
1	Hate Incident Project: Set up/ upkeep/ dispersment of Hate Incident	\$ 2,000.00	\$ 1,500.00	\$ 500.00
2	Festival coordinator and music	\$ 2,000.00	\$ 1,500.00	\$ 500.00
3	Festival insurance and venue	\$ 1,000.00	\$ 500.00	\$ 500.00
4	Festival vendor participation grants	\$ 2,000.00	\$ 1,500.00	\$ 500.00
5	Festival planning	\$ 3,000.00	\$ 3,000.00	\$ 0.00
6	Festival equipment/supplies/ promo	\$ 3,000.00	\$ 2,500.00	\$ 500.00
7	Documentary shooting and editing	\$ 5,000.00	\$ 3,000.00	\$ 2,000.00

8 Documentary planning \$ 2,000.00 \$ 1,500.00 \$ 500.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

## PART 4: AWARENESS AND VISIBILITY



**Describe the plan for promoting this project within the City of San Luis Obispo.**

Social Media campaign - Insta and Facebook

Connecting with major leaders for cross-promotion

Announcements of events through community organizations such as the Police Advisory Committee and Public Safety SLO as well as Race Matters, BSU, Paso People's Action, Mujeres de Accion, etc.

Physical Fliers

Local News Networks

Local Newspapers - Tribune, NewTimes, SloScoop

**How will you highlight the City's support of your project?**

Website (in-progress) announcement

Website year-long footer logo

Facebook announcement

Instagram post and stories

Every major event (such as rallies and festivals)



## PART 5: CERTIFICATION

By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person completing this Application: \***

Mia Shin

**Signature \***

*MIA SHIN*

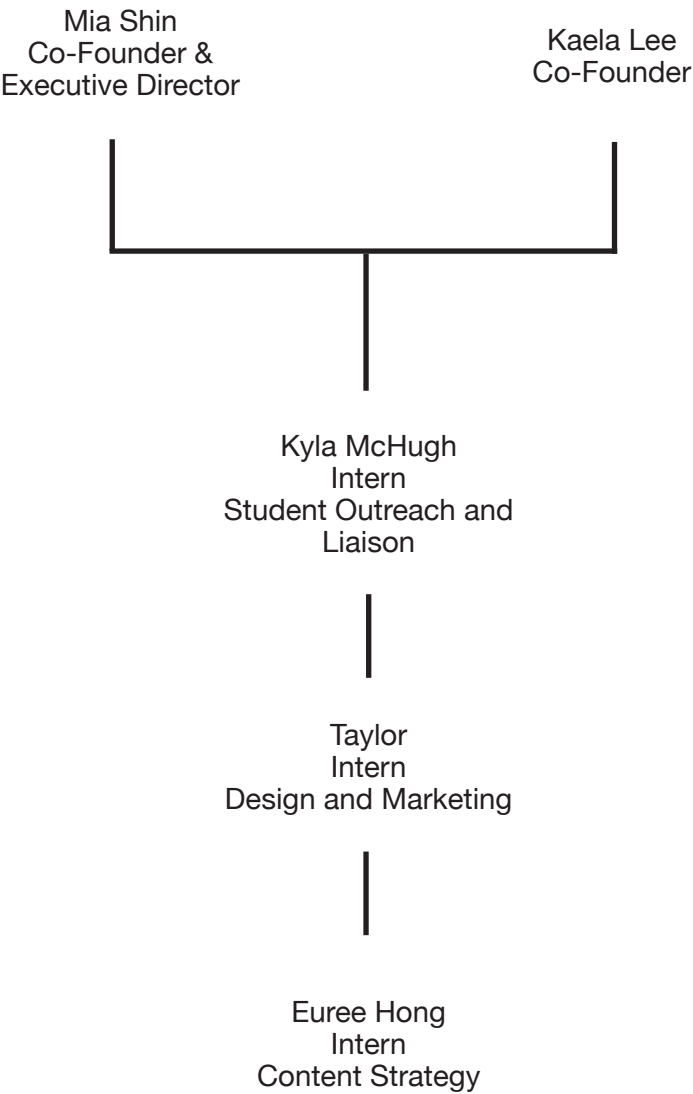
**Title: \***

Co-Founder & Executive Director

**Date: \***

8/31/2022

AAPI SLO  
Organizational Leadership Chart  
August 2022



INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **MAY 21 2010**

ECOLOGISTICS INC  
4349 OLD SANTA FE RD 5  
SAN LUIS OBISPO, CA 93401

Employer Identification Number:  
27-2116150  
DLN:  
17053106316000  
Contact Person:  
RENEE RAILEY NORTON ID# 31172  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
December 31  
Public Charity Status:  
509(a)(2)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
February 16, 2010  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

ECOLOGISTICS INC

Sincerely,

A handwritten signature in black ink, appearing to read "Robert Choi". The signature is stylized with a large, looping initial "R" and a cursive "C".

Robert Choi  
Director, Exempt Organizations  
Rulings and Agreements

Enclosure: Publication 4221-PC

**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)



**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 11/21/2022 | 9:09 AM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and CASA (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to Latinx outreach efforts as submitted in its application to the CITY on August 31, 2022.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$5,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

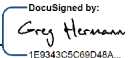
GRANTEE:  
CASA  
Sarah DeYoung  
75 Higuera Street  
San Luis Obispo, CA 93406  
sdeyoung@slocasa.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By: \_\_\_\_\_  
Sarah DeYoung, Development Director

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By: \_\_\_\_\_  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By: \_\_\_\_\_  
Christine Dietrick, City Attorney



# Diversity, Equity and Inclusion

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION

**Organization Name: \***

CASA of San Luis Obispo County, Inc.

**Year Established: \***

1993

**Fiscal Agent, if different than above: \***

CASA of San Luis Obispo County, Inc.

**Tax ID #: \***

770316227

**Document Certifying Federal Tax-Exempt status, if applicable**

Copy of 501(c)(3) Status IRS Determination Letter (1).pdf 220.7KB

**Name of Executive Director (or highest leadership position)**

Lovisa Stannow

**Approximate Annual Budget:**

1,293,482

**Major Sources of Funding:**

State Government Grants, Local Government Grants, Private Foundations, Corporate Foundations, Individuals and Corporate Sponsors

**Mission Statement:**

CASA of San Luis Obispo County (SLO CASA) advocates for the best interests of abused and neglected children within the court system. CASA recruits, trains, and supervises volunteers who advocate for this vulnerable population with the goal of ensuring that each and every child grows up in a safe, nurturing, and permanent home.

**Number of paid staff (full- or part-time):**

13

**Number of volunteers:**

287

**Name of Board President or Chair:**

Dr. Gilbert Stork

**Organizational Leadership Chart \***

Organizational Chart August 2022.pdf 227.49KB

**Name of Person completing this Application:**

Sarah DeYoung

**Organization Mailing Address: \***

Street Address

75 Higuera Street

Address Line 2

Suite 180

City

San Luis Obispo

State / Province / Region

California

Postal / Zip Code

93406

Country

United States

**Phone: \***

805-592-1245

**E-mail: \***

sdeyoung@slocasa.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

CASA of San Luis Obispo County is a 501(c)(3) non-profit agency that is headquartered at the intersection of Higuera Street and Madonna Road in San Luis Obispo. We are a member of the National CASA/GAL Association.

CASA volunteers provide one-on-one support for foster children and youth throughout the life of their child welfare case. CASA volunteers are trained to gather information and focus their advocacy (primarily in reports to the court) to cover the needs of the whole child, including placement, physical and mental health, education, permanency, and well-being. Supporting normalcy for their CASA children is a key component of this work. We are committed to providing a trained and competent CASA volunteer for every abused and neglected child in the foster care system in San Luis Obispo County who wants or needs one.

All the 184 CASA volunteers who were assigned to children and youth in the foster care system during the last fiscal year received coaching and ongoing support and supervision from one of SLO CASA's five staff Advocate Supervisors. In addition, we delivered 25 in-service training sessions administered by local service providers and agency partners on topics such as Cultural Competencies, Child Abuse and Neglect, Substance Abuse, Domestic Violence, Mental Health Challenges, Grief/Loss Effects on Child Development and Visitation with Parents, Preparing and Participating in Court Hearings, and Communicating with Children and Families. The total attendance at these 25 sessions was 266.

SLO CASA is committed to continuously identifying and implementing process improvements and program upgrades to better support our volunteers and the children and youth they serve. Other key activities for FY 2021-2022 included recruiting, screening, training, and swearing in 47 new CASA volunteers, upgrading our Infant and Toddler program and Mentor program, and identifying additional training and support needed for volunteers who are serving our high-risk children and youth.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

In FY 2021-2022, SLO CASA supported 184 volunteers who were assigned to 267 foster children. Approximately 50 of those children, or 18%, were placed in the city of San Luis Obispo during the fiscal year. As of the end of the fiscal year, approximately 30, or 16%, of our CASA volunteers resided within the city boundaries.

CASA of San Luis Obispo serves children and youth in the foster care system in San Luis Obispo County. While the overwhelming majority of children and youth served by our CASA volunteers are placed within the county, we also have children and youth who are placed with relatives or in Short Term Residential Treatment Placements in Santa Barbara, Sacramento, Ventura, Los Angeles, and San Diego counties.

**PART 2: PROJECT INFORMATION**

**Name of DE&I Project \***

Diversity is the Power of Change

**Est. number of people served through this project: \***

200

**Est. number of SLO CITY RESIDENTS served through this project \***

50

**Total Project Cost: \***

50,000

**AMOUNT OF CITY FUNDING REQUESTED: \***

10,000

**Describe your proposed project or program.**

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

CASA of San Luis Obispo (SLO CASA) adopted goals in its 2020-2023 Strategic Plan to improve the diversity, equity, and inclusion of its volunteer base and of its Board of Directors to more accurately reflect the gender and ethnicity of the foster children we serve.

With regard to volunteers: The Program Team specifically identified the need to recruit more men and persons of Latino descent. Boys in the foster care system often lack positive male role models and respond very positively to being assigned to a male CASA volunteer. Similarly, bilingual Latino CASA volunteers are crucial in helping Latino children stay connected with their cultural traditions, as well as with their biological families. Currently, both groups are under-represented among SLO CASA's volunteers.

With regard to the Board of Directors: CASA of San Luis Obispo is committed to diversifying the make-up of its Board of Directors and staff. Three current staff members have been promoted into positions at the Director level, one of whom is of Latino descent. Four new staff members have recently been hired, one of whom identifies as Asian-American and another who identifies as Native American. The Board of Directors has just begun an effort to add new Board members, with a focus on diversity, and the most recent addition is a woman of Latino descent.

Although the Strategic Plan included plans to create Objectives and an Action Plan to address diversity needs/goals for the Board, the Covid 19 pandemic and a recent leadership transition at SLO CASA delayed this work. However, the Board is now poised to make DEI a top priority.

A grant of \$10,000 from the City of San Luis Obispo will cover approximately 20% of the total proposed project and enable CASA of San Luis Obispo to 1) significantly improve the diversity of its volunteer base by increasing the number of men and persons of Latino descent who serve in this pivotal role and 2) fund foundational and organizational development DEI training for our Board of Directors. The proposed budget includes funding for assessing the effectiveness of CASA's current recruitment marketing and expanding this work to support additional strategies; convening two focus groups of current volunteers and staff members to identify additional recruitment strategies focused on recruiting more male volunteers and more volunteers who identify as Latino; hosting two special recruitment events targeting potential male and Latino volunteers; preparing and offering DEI training for our Board of Directors led by a local consultant.

We hope to leverage funding from the City with funding we are seeking from the National CASA Association, Union Pacific Local Grants Foundation, and the Community Foundation of San Luis Obispo to make meaningful progress on our DEI goals.

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

Although SLO CASA has been successful in increasing the percentage of new volunteers who identified as Latino by 3.5 times over the past three years, the overall percentage of Latino volunteers (6%) is still not reflective of the population of Latino children we currently serve (26%). Similarly, the number of new male volunteers has increased to 24% and while that is significantly higher than the overall percentage of men in our volunteer pool (17%), it is still well below the percentage of boys we currently serve (40%). Clearly, we need to identify strategies and recruitment tools that will help us make additional progress toward this goal.

CASA currently has funding from the California Office of Emergency Services that is being used to implement an outreach program developed by a local marketing agency to reach potential volunteers who more accurately reflect the population we serve. This outreach includes print, online, and other types of advertising that feature men and boys and Latino adults and children. While this marketing has been effective and needs to continue, more staff time and investment is clearly needed to meet our diversity goal.

We have identified the following new strategies:

In order to recruit more men:

1. Evaluate the effectiveness of the current marketing and outreach plan to determine which types of communication have been effective in reaching the target population and update and expand the marketing/outreach plan to include and support new focus group and recruitment event strategies.
2. Form a focus group of current male CASA volunteers to develop a targeted recruitment strategy that: identifies why men do or do not decide to apply to be CASA volunteers; identifies messaging or recruitment events that reach men; identifies agencies or groups to partner with to reach potential male volunteers; identifies barriers among men to follow through on an interest to serve and ways to mitigate those barriers.
3. Organize a special recruitment event aimed at reaching potential male CASA volunteers, working together with one or several of CASA's existing sponsors, such as Sunset Honda or Specialty Construction.

In order to recruit more people who identify as Latino:

1. Evaluate the effectiveness of the current marketing and outreach plan to determine which types of communication have been effective in reaching the target population to include and support new focus group and recruitment event strategies.
2. Form a focus group of current Latino CASA volunteers to develop a targeted recruitment strategy that: identifies why Latino men and women do or do not decide to apply to be CASA volunteers; identifies messaging or recruitment events that reach Latino men and women; identifies agencies or groups to partner with to reach potential Latino volunteers; identifies barriers among people of Latino descent to following through on an interest to serve and ways to mitigate those barriers.
3. Organize a special recruitment event aimed at reaching potential Latino volunteers, working together with one of CASA's local partner organizations, like Promotores Collaborative of San Luis Obispo.

**Describe the equity gaps and community needs this project will address.**

We believe – based on the experiences of children and youth served by these volunteers – that support from a positive male or Latino role model significantly increases the sense of belonging and inclusion experienced by these often-marginalized youth.

Such diversity is important because many of the boys in the foster care system lack male role models and respond very positively to being assigned to a male CASA volunteer and to do “guy stuff” with them. For example:\*

- Joel and Michael, ages 14 and 16, have a young male CASA volunteer named Tim. The boys have four siblings, and their father was recently tried and convicted of molesting their older sister. They and their younger brother are placed in “family maintenance” with their mother, which is hopefully the final stage of the foster care process when children return home but the case stays open in order for the court to confirm that the parents are able to provide a safe and stable environment. Joel and Michael’s mother is trying, but she struggles with mental health challenges and the effects of a lifetime of domestic violence. Some of the boys’ weekly visits with Tim consist of hanging out and trying a new type of food each week (e.g., Thai, Mexican). Other times they bowl and see if their game improves when they wear their hats differently (backwards, inside-out). Tim is also helping them both apply for summer jobs and is working with Joel on preparing to take his driving test. They recently went over safety (seat belts, checking mirrors, etc.), the basics of turning on the car and shifting gears, and even took a tour under the hood.
- Karen and Dan are assigned to a 15-year-old boy, Oscar, who has challenging sexualized behaviors and has spent most of his life in the foster care system. When they completed CASA training, they took on this challenging youth who was on his 22nd placement. The social worker had requested a male CASA volunteer to help Oscar learn how to form healthy relationships with girls and manage his sexualized behaviors but was thrilled to have a CASA couple assigned who could model a healthy and positive marital relationship for him. Karen and Dan have become Oscar’s educational rights holders and have discussed everything from sports, how to budget and compute sales tax, and the dangers of vaping. Dan has also spent one-on-one time with Oscar discussing how to treat women with respect.

Similarly, foster children of Latino heritage often face language barriers, and bilingual Latino CASA volunteers can be especially effective in helping these children learn English, as well as support them in interacting with their biological families. Even where language is not an issue, Latino volunteers can help Latino foster children stay connected to their cultural traditions. For example:\*

- Josie is a 15-year-old girl with significant mental health challenges. She has been hospitalized a number of times due to suicidal ideation and self-harm behaviors. This spring, Josie told her CASA volunteer, Paloma, that she really wanted a quinceañera for her 15th birthday party. Josie’s mom was back in jail and being charged with selling drugs, and Josie knew that Paloma (who is also of Mexican-American heritage) would best understand the importance of having a quinceañera and how to make it happen even though Josie is currently placed in a residential treatment center for high-needs youth. In her report to the court, the social worker reported that Josie looked “absolutely beautiful” and was a gracious hostess to all the guests at her quinceañera.

\*Note: all names of foster children and CASA volunteers have been changed.

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
% increase male volunteers	5% by 6/30/23
Example : # of BIPOC serving on public boards, committees	Example: 10% increase by end of 2021
% increase in Latino volunteers	5% by 6/30/23

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner	Activity/Service They Provide for This Project
-----------------	--



Example: ABC Business

Sunset Honda

Example: ABC Business

Specialty Construction Inc.

Example: ABC Business

Promotores Collaborative of SLO

Example: ABC Business

Local DEI Consultant

Example: Free Use of Space for Weekend Classes

Host recruitment event

Example: Free Use of Space for Weekend Classes

Host recruitment event

Example: Free Use of Space for Weekend Classes

Help with targeted recruitment activities for Latinos

Example: Free Use of Space for Weekend Classes

Prepare and deliver DEI Training to CASA Board

Provide the timeline for this proposed project.

3-4Q22:

1) Assess the effectiveness of CASA's current recruitment marketing and expand this work to support additional strategies. 2) Convene two focus groups of current volunteers and staff members to identify additional strategies focused on recruiting more male volunteers and more volunteers who identify as Latino.

1Q23: Host two special recruitment events targeting potential male and Latino volunteers

Describe your plan for sustainability beyond the City's one-year award funding, if applicable.

We anticipate that we will gain great insight and knowledge about how to continue improving SLO CASA's DEI work well beyond the funding period, especially through the learnings from the two proposed focus groups. We believe that this information will be instrumental in helping us modify and enhance our recruitment strategies and continue to improve the diversity of our volunteer base in the future.

After completing the targeted recruitment project activities described in this proposal, we plan to designate one or more of our Advocate Supervisors (or possibly other staff members) as the permanent leads for this project. This role would include developing and implementing plans for Fiscal Year 23-24 that would include targeted recruitment as well as provide additional support and training to our existing male and Latino volunteers. This plan could include regular gatherings of these subsets of volunteers (e.g., re-launching our monthly men's group at a local brewery or coffee shop), new marketing and advertising materials or strategies (in both Spanish and English), and researching/networking with other CASA organizations or local agencies to learn from their successes. We currently receive funding from a variety of local government grants, state government grants, corporate foundations, private foundations, and individuals and corporate sponsors, and would seek additional funding to support these ongoing activities.

PART 3: PROJECT COST / BUDGET

Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Personnel	\$ 25,000.00	\$ 5,000.00	\$ 20,000.00
2 Marketing	\$ 10,000.00	\$ 2,000.00	\$ 8,000.00
3 Recruitment Events	\$ 10,000.00	\$ 2,000.00	\$ 8,000.00
4 DEI Training	\$ 5,000.00	\$ 1,000.00	\$ 4,000.00

\*During application review, you may be asked for further financial information or for proof of any matching funds

PART 4: AWARENESS AND VISIBILITY

Describe the plan for promoting this project within the City of San Luis Obispo.

The marketing campaign for the project will include new over-the-street banners (one placed above Marsh Street for a week at a time) during each quarter. It will also include our billboard (currently placed alongside the 101 north of the Monterey Street on/off ramps) which depicts a boy with his male CASA volunteer, as well as print and online flyers, social media posts, and other materials created for targeted recruitment of male and Latino volunteers.

**How will you highlight the City's support of your project?**

We plan to create a new webpage to describe the project and highlight the funders who are specifically supporting it. We also plan to create recognition posts on four different social media channels, and to recognize the City's support in our Executive Director newsletter and in marketing materials prepared for the project.

## PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

**Name of Person completing this Application: \***

Sarah DeYoung

**Signature \***

A rectangular box containing a handwritten signature in black ink, which appears to read "Sarah DeYoung".

**Title: \***

Development Director

**Date: \***

8/12/2022

Copy of 501(c)(3) Status IRS Determination Letter

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: NOV 05 1997

COURT APPOINTED SPECIAL ADVOCATES  
OF SAN LUIS OBISPO COUNTY INC  
550 FOOTHILL BLVD  
SAN LUIS OBISPO, CA 93405

Employer Identification Number:  
77-0316227  
DLN:  
17053186738007  
Contact Person:  
ANNA YORK  
Contact Telephone Number:  
(513) 684-3957  
Our Letter Dated:  
January 1994  
Addendum Applies:  
No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

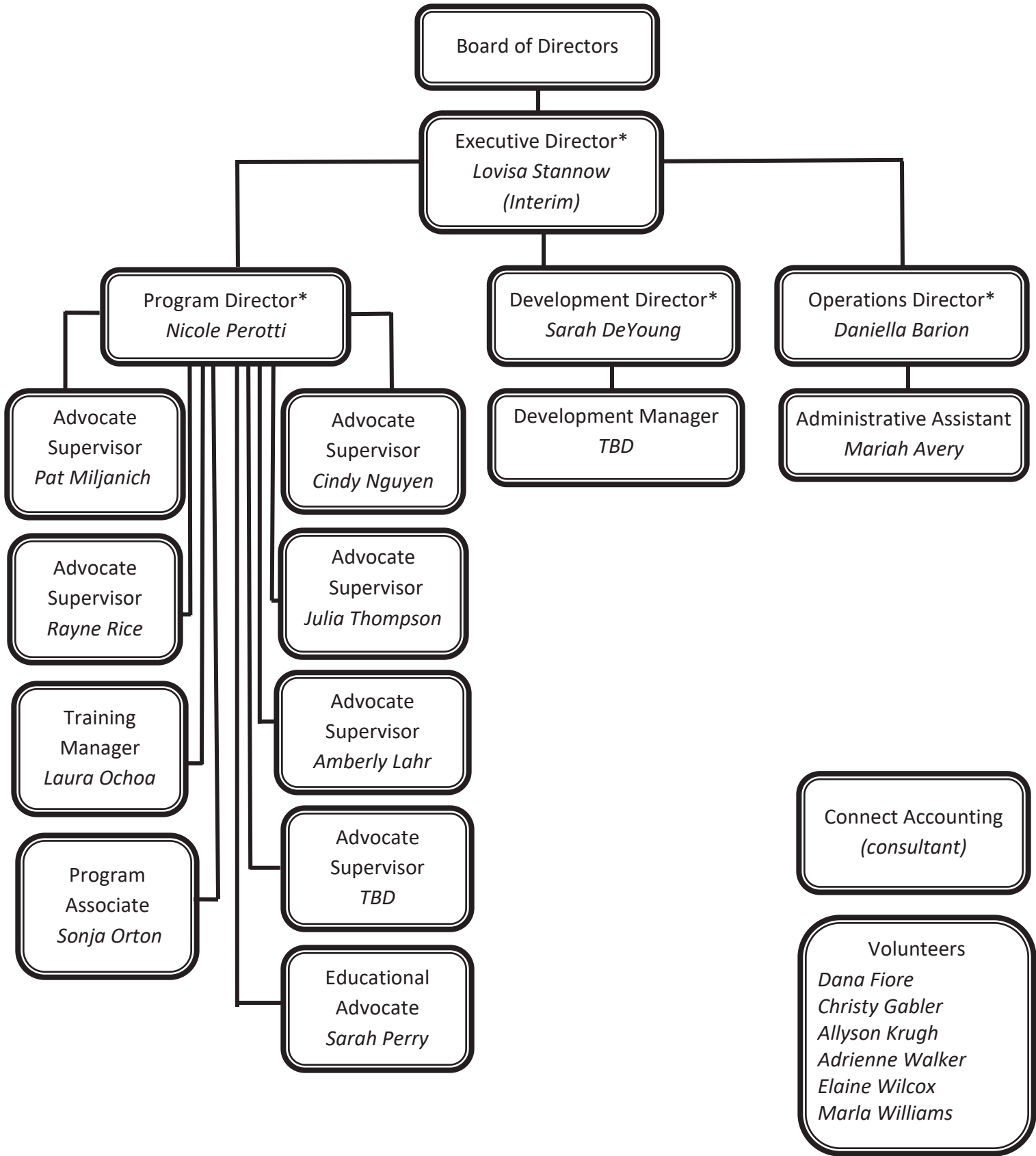
Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,

  
District Director

CASA of San Luis Obispo County  
Organizational Chart, August 2022



\*Management Team member

EXHIBIT B

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slocity.org)

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**HUMAN RELATIONS COMMISSION AGREEMENT FOR  
DIVERSITY EQUITY INCLUSION PROGRAM GRANT**

THIS AGREEMENT, dated 12/21/2022 | 4:17 PM PST for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Transitions Mental Health Association (referred to herein as GRANTEE).

**WITNESSETH:**

WHEREAS, GRANTEE has requested CITY to contribute to DEI Mental Wellness Initiative as submitted in its application to the CITY on August 29, 2022 (the "Service" or "Services")

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to CITY residents from January 1, 2023 to December 31, 2023.
2. GRANTEE will provide CITY with a mid-year report, due May 1, 2023, and final program report, due January 1, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees, or volunteers for GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability on the part of the CITY as a result of any act or omission, negligent or otherwise, by GRANTEE.
5. CITY agrees to pay GRANTEE a one-time only grant, in the sum of \$27,550, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
6. The Department Head – Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) days after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said

termination.

7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Committee "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

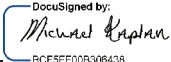
City of San Luis Obispo  
919 Palm Street  
San Luis Obispo, CA 93401  
Attn: Greg Hermann, Assistant City Manager

GRANTEE:

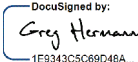
Transitions Mental Health Association  
784 High Street  
San Luis Obispo, CA 93401  
mkaplan@t-mha.org

**IN WITNESS WHEREOF**, the parties hereto have executed this agreement by their proper officers duly authorized:

Grantee

By:  \_\_\_\_\_  
BCF5FF00B306438...

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:  \_\_\_\_\_  
1E9343C5C69D48A...  
Greg Hermann, Assistant City Manager

APPROVED AS TO FORM:

By:  \_\_\_\_\_  
49590B18C67B45D...  
Christine Dietrick, City Attorney





# Diversity, Equity and Inclusion

Exh A

2022-2023 GRANT FUNDING FOR HIGH IMPACT DE&I PROJECTS

Please provide all requested information before submitting your application. **Please be as specific as possible!**

*If accommodation or assistance is needed in completing this Application, or if a paper version is preferred, please contact (805) 781-7100 or DEI@slocity.org*

## PART 1: APPLICANT INFORMATION



**Organization Name: \***

Transitions-Mental Health Association

**Year Established: \***

1979

**Fiscal Agent, if different than above: \***

n/a

**Tax ID #: \***

953509040

**Document Certifying Federal Tax-Exempt status, if applicable**

TMHA-IRS501c3-1page.pdf

91.68KB

**Name of Executive Director (or highest leadership position)**

Jill Bolster-White

**Approximate Annual Budget:**

18,000,000

**Major Sources of Funding:**

County of San Luis Obispo and County of Santa Barbara Behavioral Health Departments

**Mission Statement:**

Transitions-Mental Health Association is a nonprofit organization dedicated to eliminating stigma and promoting recovery and wellness for people with mental illness through work, housing, community and family support services.

**Number of paid staff (full- or part-time):**

250

**Number of volunteers:**

566

**Name of Board President or Chair:**

James "JT" Haas

**Organizational Leadership Chart \***

Org Chart 6-16-22.pdf

159.26KB

**Name of Person completing this Application:**

Michael Kaplan

**Organization Mailing Address: \***

Street Address

784 High Street

Address Line 2

City

San Luis Obispo

State / Province / Region

CA

Postal / Zip Code

93401

Country

United States

**Phone: \***

805-540-6513

**E-mail: \***

mkaplan@t-mha.org

**Briefly describe your organization's mission, primary activities, and operating structures.**

Transitions-Mental Health Association (TMHA) is a community based, private non-profit human services agency. Since 1979, TMHA has developed and operated housing, employment, and wellness support programs in San Luis Obispo and Northern Santa Barbara Counties for adults and youth living with a mental illness. Our mission statement: Transitions-Mental Health Association is a nonprofit organization dedicated to eliminating stigma and promoting recovery and wellness for people with mental illness through work, housing, community and family support services. In Fiscal Year 21-22, TMHA provided services to over 3,900 clients and family members in San Luis Obispo County. In addition, our agency provided over 12,000 mental health outreach and education contacts in San Luis Obispo County to help our communities understand that mental illness is treatable and recovery is an option.

TMHA services include Mental Health Services Act (MHSA) Full Service Partnerships intensive treatment programs, adult and adolescent mental health treatment programs and housing, vocational and employment services, homeless services, case management, clinical and therapy support, social rehabilitation programs, wellness centers, support groups, public outreach and mental health education, and family advocacy services. TMHA also operates the Growing Grounds Farm and Nursery and the Growing Grounds Downtown store in San Luis Obispo; two social enterprise businesses that provide employment for over 90 disabled people annually. In 2010, TMHA assumed operation of the Central Coast Hotline (formerly SLO Hotline), a 24-hour suicide prevention and mental health crisis line that accepts over 10,000 calls each year. In 2010, 2016, 2019 and 2022, TMHA received internationally recognized certification from CARF, the Commission on the Accreditation of Rehabilitation Facilities. TMHA and Central Coast Hotline are awarded accreditation through the American Association of Suicidology (AAS) annually since 2013 and TMHA staff currently chair and support the SLO Suicide Prevention Council.

TMHA's philosophical approach to service delivery is to create a supportive, structured environment that is responsive to the needs and preferences of clients and their families, focusing on increased self-determination. The emphasis of the many programs run by TMHA is to facilitate the learning of vital independent living skills, and to build a framework for community re-entry through empowerment and experience. 32% of the staff we hire have lived experience with mental illness, and these individuals hold positions that include program manager, peer specialist, mental health advocate, homeless outreach worker, accounting and retail sales.

Throughout the year, TMHA organizes educational forums, an art show, and family advocacy presentations that work towards dispelling the stigma of mental illness, helping to change the attitudes that can have a negative impact on people and their families. The SLO Chapter of National Alliance for the Mentally Ill (NAMI), County Behavioral Health, local consumers, and community members support TMHA in these endeavors to empower people with severe and persistent mental illness to advocate, educate and live independently within their own communities.

TMHA's operating structure is a Board of Directors (17), an Executive Director, 7 Division Directors, and numerous Program Managers and Coordinators.

**Describe the community(ies) your organization supports.**

Please be specific in the population and geographic area.

TMHA provides behavioral health services to adults and adolescents living with a mental illness throughout all of San Luis Obispo County. We have Wellness Centers in three cities in SLO County (Arroyo Grande, City of San Luis Obispo, and Atascadero), two social enterprises in the City of SLO that provide employment for adults living with a mental illness, and supportive housing throughout the entire county. TMHA provides Family Services in nearly every community in San Luis Obispo County, and the Central Coast Hotline provides 24/7 crisis response and basic information on mental health services to the entire Central Coast. TMHA provides similar services in Santa Maria and Lompoc in Santa Barbara County.

The vast majority of TMHA clients are on the lowest rung of the economic ladder, receiving either SSI (\$860/month or General Relief (\$315/month). According to the National Alliance for the Mentally Ill (NAMI), 71% of mental health clients report an annual income of \$20,000 or less and “an estimated one-third to one-half of people who live with serious mental illness lives at, or near, the federal poverty level.” The National Association of State Mental Health Program Directors has observed that for this population unemployment rates can be “as high as 90 percent.”

PART 2: PROJECT INFORMATION



Name of DE&I Project \*

DEI Mental Wellness Initiative

Est. number of people served through this project: \*

12855

Est. number of SLO CITY RESIDENTS served through this project \*

1783

Total Project Cost: \*

1,783

AMOUNT OF CITY FUNDING REQUESTED: \*

64,045

Describe your proposed project or program.

Specify what the requested funds will be used for, the need for this project, the number of people impacted. Include a project plan, if available.

In January 2021, TMHA launched a Diversity, Equity and Inclusion Committee which conducted a thorough audit of the agency, provided a report and a set of recommendations for areas of growth, and created a dedicated web page with links for learning (<https://www.t-mha.org/diversity.php>). This committee, composed of staff from a variety of programs, is led by Joy M. Pedersen, Ph.D., a TMHA Board Member and founder of Clarity Collective LLC. The committee identified community needs and subsequently developed this application. The prevailing focus of this proposal is to provide greater access to mental health services for Spanish-speaking and monolingual Spanish-speaking adults living with a mental illness. We propose to accomplish this through the following activities.

1) Hire a professional translator to translate all TMHA brochures, web pages and other agency materials into Spanish. Estimated cost: \$9,000 for six months of services, at 25-35 hours per week and \$1,500 in printing costs.

2) Upgrade the TMHA website (one of our community's prime portals for the access of and information about services), providing a simple "toggle switch" between English language and Spanish language. Currently, Spanish translation can only be accessed by downloading a PDF on each web page. Estimated cost: \$11,000

3) Create a new collaboration with the Promotores Collaborative of San Luis Obispo to provide county-wide outreach in conjunction with TMHA's Family Services program to raise awareness about mental illness and available mental health services among the Hispanic, Latinx and Mixtecan populations. The Promotores Collaborative has been serving our region for over 10 years, developing a sustainable, diverse, and comprehensive culture that promotes equal access to community resources and services among all members of the Hispanic community in San Luis Obispo County. Estimated cost: \$20,000

4) In collaboration with the Promotores Collaborative of San Luis Obispo, launch a new pilot support group for monolingual Spanish-speaking clients that will be delivered over 18 weeks, with half the sessions provided in person at the Life House Wellness Center in Atascadero, and the other half presented on Zoom to reach participants throughout the rest of San Luis Obispo County. Estimated cost: \$17,550

5) Hire Clarity Collective LLC to provide DEI trainings over the next 12 months in the following four areas:

Foundations of Diversity, Equity, and Inclusion.

This training begins the conversation surrounding cultural literacy including diversity, equity, and inclusion. Topics covered and discussed include basic terms and vocabulary, understanding different forms of social identity and privilege, learning how we learn culture, and the impact of socialization.

Building Self-Awareness and Understanding Privilege.

This training continues the conversation surrounding cultural literacy including diversity, equity, and inclusion. During the session, participants engage in deeper self-reflection in order to build awareness of implicit bias, acknowledge privilege, examine social responsibility, and understand how socialization and culture impact their work.

Creating an Inclusive and Anti-Racist Culture.

This training helps participants learn to identify and interrupt bias. Participants will explore their social responsibility to engage in bystander intervention, advocacy, and social change. They will be introduced to racism as an institutional structure and gain an understanding of the importance of being anti-racist.

Microaggressions.

Microaggressions are the everyday slights, insults, putdowns, invalidations, and offensive behaviors that people of color experience in daily interactions with generally well-intended people who may be unaware that they are being racially demeaning. In this workshop, participants will learn to identify microaggressions, interrupt negative behavior, educate others, and offer support.

These trainings will be offered to TMHA staff who provide direct services to community members.

Estimated cost: \$900

**Describe the community the project will support.**

Specify the population, location of services provided, and any other identifiers your proposed project will support.

In the County of San Luis Obispo, 23.8% or 64,275 citizens identify as Hispanic or Latinx. In the City of San Luis Obispo, those numbers are 18.8% or 8,918 citizens (all data from the U.S. Census, July 2021). The most widely understood data point regarding mental illness comes from NAMI (National Alliance on Mental Illness): 1 in 5 adults in America experience a mental illness. The math would then suggest our target population in the County of San Luis Obispo is approximately 12,855 community members, and within the City of San Luis Obispo approximately 1,783.

There are TMHA programs and County Behavioral Health Services distributed throughout San Luis Obispo County, but far too many individuals are unaware of their existence—or how to access them. Between Spanish-language versions of TMHA's web site and printed materials, our hope is to better disseminate this information to our target population. At the same time, we are looking to provide a pilot program that will more effectively engage Hispanic/Latinx community members who not only seek treatment but a sense of community around their mental health journey.

**Describe the equity gaps and community needs this project will address.**

Hispanic/Latinx communities show similar vulnerability to mental illness as the general population, but they face disparities in both access to and quality of treatment. More than half of Hispanic young adults ages 18-25 with serious mental illness may not receive treatment. This inequality puts these communities at a higher risk for more severe and persistent forms of mental health conditions, because without treatment, mental health conditions often worsen. 35.1% of Hispanic/Latinx adults with mental illness receive treatment each year compared to the U.S. average of 46.2% (2020 National Survey on Drug Use and Health, SAMHSA).

Common barriers to treatment for the Hispanic/Latinx communities include language barriers, lack of cultural competence, lack of health insurance, and the stigma of mental illness. The latter can be a particularly difficult barrier to overcome. As noted by NAMI: "Stigma within the Hispanic/Latinx community can also lead to a lack of information as individuals may not recognize the symptoms of mental health conditions or know where to seek help. In turn, this may cause individuals to not seek treatment. When mental health is not commonly or openly talked about, people seeking treatment may have limited knowledge and comfort with the different types of therapy and psychiatric medications available."

In the table below briefly list 2-3 methods of evaluation and indicators of success or measurable outcomes.

Methods of Evaluation	Indicators of Success / Measurable Outcomes
Example : # of BIFOC serving on public boards, committees	Example: 10% increase by end of 2021
# of individuals who access Spanish-language version of the website	25 a month, or 300 over the 12-month grant period
Example : # of BIFOC serving on public boards, committees	Example: 10% increase by end of 2021
# of Spanish-speaking outreach contacts in 12 months	4,000 unique individuals reached
Example : # of BIFOC serving on public boards, committees	Example: 10% increase by end of 2021
# of participants in Spanish-language support group	7-10 unique participants
Example : # of BIFOC serving on public boards, committees	Example: 10% increase by end of 2021
Support group participants will demonstrate an increase in their use of coping skills to manage mental health	20% based on pre-and-post surveys

In the chart below, identify any partnerships/collaborations that are supporting this project, and their roles.

Name of Partner	Activity/Service They Provide for This Project
-----------------	--

Example: ABC Business  
Promotores Collaborative of San Luis Obispo

Example: Free Use of Space for Weekend Classes  
Conduct county-wide outreach to Hispanic, Latinx and Mixtecan populations and collaborate with TMHA Wellness Center Staff to lead Spanish-language support group

Example: ABC Business  
Clarity Collective LLC

Example: Free Use of Space for Weekend Classes  
Provide DEI trainings to TMHA staff

Provide the timeline for this proposed project.

Community outreach and Spanish language translation services will commence immediately upon funding of the grant in January 2023. Printing and website updates will likely occur by March 2023. The launch of the pilot program at the Wellness Center will occur in the second quarter of the calendar year, April 2023. All DEI trainings within TMHA are ongoing and will continue throughout the calendar year.

Describe your plan for sustainability beyond the City’s one-year award funding, if applicable.

Translation, printing, and website architecture are all one-time costs that will be amortized over the next few years. The subsequent updating of Spanish-language translation will be a more modest cost that can be absorbed by the agency’s Community Engagement budget.

If the one-year pilot program of the Spanish-language support group is successful, TMHA will either bear the cost of the collaborative program moving forward or make an attempt to integrate the service with our annual contract with San Luis Obispo County Behavioral Services.

PART 3: PROJECT COST / BUDGET



Using the table below, please provide a broadly-itemized budget for your project, including the source of any matching funds.

Item Description *	Total Cost *	Amount Provided by City Funds *	Amount of Other Funds and Source of Funding *
1 Translation Services	\$ 9,000.00	\$ 9,000.00	\$ 1,000.00
2 Printing of Translated Materials	\$ 1,500.00	\$ 1,000.00	\$ 500.00
3 Upgrade of Website to Full Translation	\$ 11,000.00	\$ 11,000.00	\$ 0.00
4 DEI Trainings for TMHA Staff	\$ 900.00	\$ 500.00	\$ 400.00
5 Outreach to Latinx, Hispanic and Mlxtecan Communities	\$ 20,000.00	\$ 20,000.00	\$ 0.00
6 Pilot Program of Spanish-Speaking Support Group at TMHA Wellness Center	\$ 17,550.00	\$ 17,550.00	\$ 0.00
7 Admin Allocation (10%)	\$ 5,995.00	\$ 5,995.00	\$ 0.00

\*During application review , you may be asked for further financial information or for proof of any matching funds

PART 4: AWARENESS AND VISIBILITY



Describe the plan for promoting this project within the City of San Luis Obispo.

Last Fiscal Year, TMHA provided over 12,000 mental health outreach and education contacts in San Luis Obispo County. These efforts will be combined with a robust social media campaign that regularly includes Facebook, Instagram, and monthly e-newsletters that are sent to over 5,500 community contacts.

### How will you highlight the City's support of your project?

One of the most unique ways TMHA expresses gratitude for local support is via the marquee in front of our headquarters on the corner of Santa Barbara and High streets. Over 14,000 cars pass the sign each day, and we will highlight this project for a full week. We will also highlight this grant on social media and within the pages of our Spring 2023 newsletter that gets mailed to over 5,000 friends and supporters.

## PART 5: CERTIFICATION



By signing this application, I certify that the information contained within is true and correct to the best of my knowledge. I agree to comply with the requirements of the City of the San Luis Obispo.

### Name of Person completing this Application: \*

Michael Kaplan

### Signature \*

A rectangular box containing a handwritten signature in black ink that reads "Michael Kaplan". The signature is written in a cursive style.

### Title: \*

Community Engagement Director

### Date: \*

8/29/2022

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
P. O. BOX 2508  
CINCINNATI, OH 45201

Date: JUN 17 1999

TRANSITIONS - MENTAL HEALTH  
ASSOCIATION  
PO BOX 15408  
SAN LUIS OBISPO, CA 93406-5408

DEPARTMENT OF THE TREASURY

Employer Identification Number:  
95-3509040

DLN:  
17053107705009

Contact Person: MARK BRECKNER ID# 95217

Contact Telephone Number:  
(877) 829-5500

Date of Exemption:  
June 1980

Internal Revenue Code  
Section 501(c)(3)

Dear Applicant:

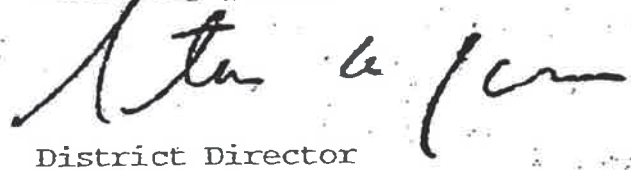
Thank you for submitting the information shown on the enclosure. We have made it a part of your file.

The changes indicated do not adversely affect your exempt status and the exemption letter issued to you continues in effect.

Please let us know about any future change in the character, purpose, method of operation, name or address of your organization. This is a requirement for retaining your exempt status.

Thank you for your cooperation.

Sincerely yours,



District Director



## Transitions-Mental Health Association Organization Chart (6-16-2022)

### BOARD OF DIRECTORS (21)

#### EXECUTIVE DIRECTOR (Jill Bolster-White)

Executive Assistant (Loretta Doukas)

#### DIVISION DIRECTORS (9):

Meghan Boaz Alvarez, Clinical Director  
Vacant, Housing & Forensic Services Director  
Barry Johnson, Education & Advocacy Director  
Vacant, Vocational Services Director (JBW, interim)  
Christina Harney, Santa Barbara County Programs Clinical Director  
Michael Kaplan, Community Engagement Director  
Jeannie Hanson, Finance & Operations Director  
Mark Lamore, Homeless Services Director  
Kristen Alexander, Human Resources Director

#### Finance & Operations Director (Jeanie Hanson)

Payroll Manager (Marci Johnson)  
Finance Manager (Adrienne Mosesian)  
Accounting Assistant (Lorie Apilado)  
Office Coordinator (Brandy Billington)  
Administrative Assistant (Carlyn Christianson)  
Office Maintenance (Sharon Samuel)

#### Community Engagement Director (Michael Kaplan)

Community Resource Coordinator (Clara Cobb)  
Social Media Specialist (Melissa Faith)  
Graphic Design Specialist (Ten Crandall)

#### Human Resources Director (Kristen Alexander)

Human Resources Coordinator (Meghan Madsen)

### Clinical Director (Meghan Boaz Alvarez)

#### Adult Full Service Partnership (FSP)

Team Leader (AJ Folino)  
Lead Clinician (Vacant)  
Case Managers (4) (Lori Munyon, Quentin Smith, Jennifer Eisen-Keams, Juanita Patlan Mendez)  
Therapist (3) (Kat Leonard, Nikki Williams, Meggan Rodarte)  
Psychiatrists (Victor Perez MD, Michael Mercuri MD)  
Medication Manager (Shakora Holt)  
Medical Assistant (Erika Holloway)  
Therapist Intern (Alex Mogensen)

#### Quality Assurance

Quality Assurance Specialist (Chad Kever)

#### Clinical Supervisor (PT) (Dan Gross)

#### Brief Therapy Clinic (Mikie Weidman, Emma Storm, Michaela Roy)

#### Central Coast Hotline Program Manager (Melanie Barket)

Program Coordinator (Mary Jacobs)  
After Hours Call Handlers (Kristina Henson, Mike Bossenberry, Chi Lao, Amanda Rafferty, Julia Byllesby, Jennifer McMurray)

#### Youth Treatment Program

Program Manager (Alley Jensen)  
Assistant Manager (2) (Laila Ness-PM & Cailyn Ortega-AM)  
Lead Clinician (Anna Yeackle)  
Medication Manager (Cassidy Craine)  
Milieu Social Worker (Deanna Castellanos)  
Psychiatric Mental Health NP (Terra Clayton)  
Residential Youth Counselors (Paloma Basulto, Max Grundmeier, Jess Moody, Tania Moeller, Vanessa Vasquez-Jones, Courteney Kauffman, Jayce Homewood, Claire Otterness, Meenu Gill)

### Housing & Forensic Services Director (Mark Lamore, temporary)

#### Community Residential Programs

Program Manager (Cody Lamacchia-Meeks)  
Assistant Manager (Jennifer Newman)

#### Community Housing

Housing Assistant-PT  
(Ruthann Briones)  
Residential Case Managers (2.5)  
(Kenia Alba, Robert Hutto, Lauren Humphrey)  
Supply Delivery Driver (Mario Perez)

#### FSP Housing-SLO

Residential Case Manager (2) (Jennifer Evans, Rozella Apel)  
FSP Housing-Atas (SYA)  
(Lorraine Espana)

Independent Living Skills Specialist-PT  
(Ruthann Briones)

#### Forensics Services

Forensics Personal Services Specialist (2)  
(Sheena Jones, Vacant)  
CAT Social Worker (Vacant)  
Homeless Support Case Manager  
(Jason Holland)  
Mobile Crisis Unit (MCU) Case Manager  
(Erin Smith)

#### Property Management (& SM housing)

Property Manager (Rob Reynders)  
Housing Assistant (Sievena Limpangug)  
Maintenance (George Lepper)

### Homeless Services Director (Mark Lamore)

#### Homeless Services

Program Manager (Crystal Racicot)

#### 65 NOW Program

Therapist (Lori Eister)  
Registered Nurse (Monica Diaz)  
Support Specialist (John Byers)  
Alcohol & Drug Case Managers  
(Laurie Gardner, Chanda Miller)

#### Permanent Supportive Housing

Residential Case Managers (2)  
(Joe Eister, Aubri Walker)

#### HSP Mentor/Driver

(Vacant)

#### PATH Outreach Worker

(Vacant)

#### Homeless Outreach Team: FSP HOT

Program Manager (Miriam Vargas)  
Therapists (2) (Nestor Zepeda, Vacant)  
Homeless Outreach Workers (2) (Dan Keller, Bekkah Tucker)  
FSP HOT Case Managers (2) (Kaitlyn Clinin, Andrea Magnia)  
Medication Manager (Don Clutter)  
Program Mentor (Thomas Wylie)

#### Housing Disability Advocacy Program

Case Manager (Melissa Reed)

#### Library Outreach Team

Social Worker (Margaret Shepard-Moore)  
Outreach Worker (Morgan Ferris)

#### Psychiatry-Supporting All Medical

Teams (Julia Tidik, NP)

#### Bishop Street Studios

Resident Manager (Vacant)  
Case Manager (Angela Calabria)

**Education & Advocacy Director (Barry Johnson)**

**Behavioral Health Navigation**

Program Manager (Trista Ochoa)  
Lead Behavioral Health Navigator (Brooke Klever)  
Behavioral Health Navigators-SET (Anthony Clementi, Cat Campos)  
Peer Advocacy & Advisory Team (PAAT) Assistant & BHN  
Navigator (Stephanie Carlotti)  
Behavioral Health Navigators-PEI (Vacant)  
BHN-Behavioral Health Education & Engagement Team (BHEET) (2)  
(Cindy Linker, Danica Brookover)  
Transition Assistance and Relapse Prevention (TARP) BH Navigator  
(John Crippen, Melissa Masters)

**Performance/Outcomes**

Performance & Outcomes Evaluator (Madeleine Smith)

**Community Outreach & Presentations**

Coordinator (Caroline Cerussi)

**Workforce Investment Grant (WIG)-SLO**

Coordinator (Jamie Cardoza)

**Family Services**

Program Manager (Shawn Ison)  
Family Support Specialist-Adult (2) (Vivian  
Soul, Fernando Vasquez)  
Family Support Specialist-Youth (3) Mayra  
Valencia, Ana O'Sullivan, Gwen  
McNamara)

**High School Project**

**Adult Transitional Program (ATP)**

Program Manager (Tom Quintana)  
Assistant Program Manager (Julie Baker)  
Residential Adult Counselors (Anne Harris, Phil Hill, Greg Dorman, Katy  
Hansen, Eric Urbain, Jose Camacho, Emily Werrett, Joe Stewart, Dale Hiner,  
Natalia Ruiz, Abe Kaplan, Rachel Hurd)

**SLO County Wellness Programs (part of E&A)**

Program Manager (Heather Bagdwal-Jones, temporary)  
Administrative Assistant (Judy Creason)  
Education Assistant (Victoria Meredith)

AG Wellness Ctr Safe Haven Supervisor (Hilary Lawson)  
AG Wellness Ctr Safe Haven Asst. Sup. (Aspen Snyder)  
AG Wellness Ctr Safe Haven Support Aide (Jordan Bouskos)

Mental Health First Aid (MHFA)/Peer to Peer (P2P)  
Wellness Recovery Action Plan (WRAP)  
Family to Family (F2F)

Atas. Wellness Ctr. Life House Supervisor (Lando Flores)  
Atas. Wellness Ctr. Life House Asst. Sup. (Laurie Trejo)  
Atas. Wellness Ctr. Life House Support Aide (Amber Balais)

SLO Wellness Ctr Hope House Supervisor (Ezra Cone)  
SLO Wellness Ctr Hope House Asst. Sup. (Lizzy Novikoff)  
SLO Wellness Ctr Hope House Support Aide (Lindsey Hamill)

**Vocational Services Director (Jill Bolster-White, interim)**

**Growing Grounds Enterprises**

Program Manager (Anna Wiens)

**Growing Grounds Downtown**

Retail Sales Supervisor/Job Coach (Genevieve Holloway)  
Retail Sales Clerks (3) (Lela Whittier, Misty Celaya,  
Vacant)  
Retail Transitional Trainees P/T (20)

**Growing Grounds Farm-San Luis Obispo**

Assistant Program Manager-Nursery (Nick Deinhart)  
Assistant Program Manager-Recovery (Tony Arnold)  
Nursery Sales Representative (Steve Kingan)  
Nursery Assistant/Driver (2) (Stephen Wilkerson, Adrian Paredes)  
Farm Workers P/T Transitional (40-60)

**Growing Grounds Farm-Santa Maria**

Program Supervisor (Sterling Snow)  
Farm Coordinator (Keith Bartlett)  
Farm Workers P/T Transitional (20-50)

**Supported Employment**

**Program Manager (Starr Cloyd)**

Assessment Specialist (Vacant)  
Vocational Specialist (3) (Megan Murchison, David Wheeler,  
Natalia Stilleson)  
Job Coach (3) (Jean Kish, Joe Reyes, Angela Gariboldi)

**Santa Barbara County Clinical Director (Christina Harney)**

**SB County Adult Wellness Programs**

Program Manager (Steve Greene)

**Workforce Investment Grant (WIG)-SB**

Coordinator (Denise Manriquez)  
WIG Interns (Cyndie Smith, Danica Brookover)

**Recovery Learning Community-Santa Maria**

Program Supervisor/LEAD Outreach Coordinator (Gabriela  
Chavez)  
Assistant Program Supervisor/LEAD Advocate (Enrique Alvarado)  
Support Hosts (Vivian Morgan, Garrett Nance)  
Computer Lab Technician (1)

**Recovery Learning Community (HH)-Lompoc**

Program Supervisor (Sandy Rives)  
Assistant Center Supervisor/LEAD Advocate (Silvia Ortega)  
Support Hosts (Nancy Leigh, Shirley Strand)  
Computer Lab Technician (1)

**Partners in Hope**

Program Manager (Shawn Ison)  
Family Support Specialists (2) (Maria Perez & Zandra Alfaro- Olea)

**LEAD Project**

Coordinator (Denise Manriquez)  
Research Assistant (Sam Martinez)

**Supportive Community Services-Santa Maria**  
**Team Leader (Vacant)**

Office Coordinator (Jessica Ybarra)  
Rehabilitation Specialists (4) (Adriana Cruz, Tiana Martinez,  
Cathleen Rafferty, Sara Carroll)  
Clinical Rehabilitation Specialist (Pam Sutliff)  
Lead Clinician (Jenna Reyes)  
Registered Nurse (Elvira Uribe Pantoja)  
Medication Support (Oscar Olate-Fuentes, Stefanie Fernandez)

**Exhibit B**

**Diversity Equity Inclusion High Impact Grant Program  
MID-YEAR REPORT**

**Due: May 1, 2023**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. If operations have changed due to COVID-19, please disclose briefly here.)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**DIVERSITY EQUITY INCLUSION PROGRAM  
YEAR-END REPORT**

**Due: January 1, 2024**

**Organization:** \_\_\_\_\_

**Program:** \_\_\_\_\_

**Administrator's Report:** *(A brief synopsis of the activities of the reporting period, including a statement of the activities, service or programs provided as described in Exhibit B (your grant application) using the Grants-In-Aid provided, and any changes that have occurred during the reporting period. **If operations have changed due to COVID-19, please disclose briefly here.**)*

**Statistical Report:** *(This section should include the number of clients served, their cities of origin, the nature of services provided, as well as any other statistics which are kept by the agency. The total number of clients served also should be broken down by the type of service received.)*

**Financial report:** *(A financial statement detailing how the City's grant money has been expended or plan to be expended.)*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
E-mail

**Please limit to no more than 2 pages.** Once signed, please scan and e-mail to Greg Hermann, Assistant City Manager, (ghermann@slcity.org)

**Certificate Of Completion**

Envelope Id: 02428894839C48F89D76282A528C66E4

Status: Completed

Subject: Complete with DocuSign: Transitions Mental Health DEI Agreement.pdf

Department:

Supplier:

Source Envelope:

Document Pages: 14

Signatures: 3

Envelope Originator:

Certificate Pages: 5

Initials: 0

Daniel Clancy

AutoNav: Enabled

990 Palm Street

Enveloped Stamping: Enabled

San Luis Obispo, CA 93422

Time Zone: (UTC-08:00) Pacific Time (US &amp; Canada)

dclancy@slocity.org

IP Address: 141.126.98.25

**Record Tracking**

Status: Original

Holder: Daniel Clancy

Location: DocuSign

11/17/2022 10:17:10 PM


dclancy@slocity.org

**Signer Events**

Michael Kaplan

mkaplan@t-mha.org

Transitions

Security Level: Email, Account Authentication  
(None)**Signature**DocuSigned by:  
  
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Signature Adoption: Pre-selected Style

Using IP Address: 74.82.136.108

**Timestamp**

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Resent: 12/16/2022 1:00:32 PM

Viewed: 12/21/2022 10:39:44 AM

Signed: 12/21/2022 10:40:10 AM

**Electronic Record and Signature Disclosure:**

Accepted: 9/7/2018 8:46:03 AM

ID: 705aefdb-0674-48ba-843a-d9ac5fb40bf0

Mark Amberg for Christine Dietrick

mamberg@slocity.org

Assistant City Attorney

Security Level: Email, Account Authentication  
(None)DocuSigned by:  
  
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Signature Adoption: Pre-selected Style

Using IP Address: 104.129.202.89

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Signed: 12/21/2022 10:59:05 AM

**Electronic Record and Signature Disclosure:**

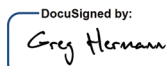
Accepted: 12/21/2022 10:58:55 AM

ID: 3d0ab644-41de-471e-b7a6-11e6bb3ecb88

Greg Hermann

ghermann@slocity.org

Deputy City Manager

Security Level: Email, Account Authentication  
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Signature Adoption: Pre-selected Style

Using IP Address: 104.129.202.83

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Signed: 12/21/2022 4:17:48 PM

**Electronic Record and Signature Disclosure:**

Accepted: 12/21/2022 4:17:32 PM

ID: c22284c0-f7d9-499e-99e0-e3c534ec48af

**In Person Signer Events****Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp**

Certified Delivery Events	Status	Timestamp
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Carbon Copy Events	Status	Timestamp
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<p>Matt Melendrez</p> <p>mmelendr@slocity.org</p> <p>Security Level: Email, Account Authentication (None)</p> <p><b>Electronic Record and Signature Disclosure:</b></p> <p>Accepted: 12/14/2022 6:19:31 PM</p> <p>ID: 02a0a1c7-8b1f-4f3e-a5f6-f78190bef4bc</p>	<div>COPIED</div>	<p>Sent: 12/21/2022 4:17:51 PM</p> <p>Viewed: 1/12/2023 3:02:18 PM</p>
<p>Michael Kaplan</p> <p>mkaplan@t-mha.org</p> <p>Transitions</p> <p>Security Level: Email, Account Authentication (None)</p> <p><b>Electronic Record and Signature Disclosure:</b></p> <p>Accepted: 9/7/2018 8:46:03 AM</p> <p>ID: 705aefdb-0674-48ba-843a-d9ac5fb40bf0</p>	<div>COPIED</div>	<p>Sent: 12/21/2022 4:17:52 PM</p>

Witness Events	Signature	Timestamp
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Notary Events	Signature	Timestamp
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Envelope Summary Events	Status	Timestamps
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Envelope Sent	Hashed/Encrypted	11/17/2022 10:19:26 PM
Certified Delivered	Security Checked	12/21/2022 4:17:32 PM
Signing Complete	Security Checked	12/21/2022 4:17:48 PM
Completed	Security Checked	12/21/2022 4:17:52 PM

Payment Events	Status	Timestamps
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Electronic Record and Signature Disclosure
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## **ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

From time to time, Carahsoft OBO City of San Luis Obispo (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through your DocuSign, Inc. (DocuSign) Express user account. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

### **Getting paper copies**

At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. For such copies, as long as you are an authorized user of the DocuSign system you will have the ability to download and print any documents we send to you through your DocuSign user account for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

### **Withdrawing your consent**

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

### **Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of your DocuSign account. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use your DocuSign Express user account to receive required notices and consents electronically from us or to sign electronically documents from us.

### **All notices and disclosures will be sent to you electronically**

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through your DocuSign user account all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

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**Required hardware and software**

Operating Systems:	Windows2000? or WindowsXP?
Browsers (for SENDERS):	Internet Explorer 6.0? or above
Browsers (for SIGNERS):	Internet Explorer 6.0?, Mozilla FireFox 1.0, NetScape 7.2 (or above)
Email:	Access to a valid email account
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	<ul style="list-style-type: none"><li>•Allow per session cookies</li><li>•Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection</li></ul>

\*\* These minimum requirements are subject to change. If these requirements change, we will provide you with an email message at the email address we have on file for you at that time providing you with the revised hardware and software requirements, at which time you will have the right to withdraw your consent.



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