

The Foundation Roundtable: Common Grant Application

Cover Sheet

Foundation you are applying to: St. Francis Foundation of Santa Barbara
 Legal Name of Applicant Organization: La Cumbre Junior High School Foundation
 Project Name (if applicable): Healthy Lifestyles & Fitness
 Funds will pay for: Weight room cardiovascular equipment & Hoist Machine
 Full Mailing Address: Post Office Box 6502, Santa Barbara, California. 93117
 Location(s) if different from above: 2255 Modoc Road, Santa Barbara, California, 93101
 Executive Director: NA
 Phone: 805-687-0761 Fax: Not Applicable
 Email: cliff Lambert@comcast.net Website: Not Applicable
 Contact Person & Title: Cliff Lambert/Trustee Phone: 805-921-3005

Tax-exempt Status:(Most foundations require 501(c)(3) status. You must check this requirement before applying.)

501(c)(3) Granted Tax I.D. Number: 26-2964339 Other: _____

Type of Request: *Check with individual foundations to determine the types of accepted grant requests.*

General Support Program Support Seed Funding Research
 Capital Endowment Multi-Year Other: _____

This Grant Request: \$ 16,329.00 Total Project Budget: \$ 18,524.00

Grant Period from: April 1, 2013 To: August 31, 2013

Total Organizational Budget for Current Year: \$ 126,000.00 Fiscal year begins: July

Summarize the organization's mission statement (two to three sentences):

The purpose of the La Cumbre Junior High School Foundation is to promote and enhance educational and social programs of the school and the Greater West side Community and foster independent thinking, healthy minds and body, love of learning and skills that prepare students for high school and beyond.

Summarize your grant request (two to three sentences):

This request is for the purchase of additional cardiovascular and weight training equipment, spin bikes, elliptical machines and a multi station hoist machine

Proposal Authorization

We certify that the information in this application is to the best of our knowledge true and accurate and is submitted with our Board of Directors'/Governing Body's full knowledge and endorsement:

 Signature Name & Title of Authorized Board/Governing Body Representative Date
Cliff Lambert, Board Member

 Signature Name & Title of Authorized Board/Governing Body Representative Date
Paul Didier, Board President

Background:

Your organization's history and accomplishments.

The La Cumbre Junior High School Foundation was established in April of 2010 out of a necessity to provide more critical resources for La Cumbre Junior High School students and faculty members with the intent of maximizing academic achievement in the classroom and at the same time encouraging exercise, nutrition and fitness. In addition, as suggested by our mission statement, improve social and educational programs on the Greater Westside. In 2010, a new external board of directors was formed with Paul Didier, President/CEO of the United Way of Santa Barbara County elected as our President. Under his leadership with the aid of six additional board members; Marjorie Trejo, Vice President, Dorothy Griffin, Treasurer, Manuel Unzueta, Secretary and Cliff Lambert, Correspondence Secretary and fundraiser, Sandy Valencia and Anthony Giovancci.

Accomplishments:

2011: Foundation finished weight room renovation with monetary support for Healthy Lifestyles and Fitness Program. Project included \$32,000 in monetary support and approximately \$3,000 in in-kind labor. Purchased for weight room included new state of the art flooring, weight machines, spin bikes, jump ropes and assorted equipment and supplies.

2011: Foundation sponsored their Annual Cinco De Mayo Dinner-Auction fundraising event in May of 2011 and raised approximately \$30,000.00.

2011: Foundation established Healthy Lifestyles Evening Cooking Class for Westside parents. The class enhances knowledge and understanding of buying and preparing food products that are more nutritional and healthier.

2011: Foundation sponsored La Cumbre Junior High School Jog-A-Thon. The event raised approximately \$9,000. Prizes were awarded to La Cumbre Students that raised the most money, e.g. I-pods, gift certificates, County Fair Passes, two I-Pads and \$800.00 to support bus trip for end of the year 8th grade trip to Golf and Stuff.

2012: Foundation in partnership with multi agencies and the private sector renovated the outdoor courts at Bohnett Park and the Westside Boys and Girls Club. This included; new basketball standards, fiberglass backboards & new lines.

2012: Foundation donated approximately \$16,000 to La Cumbre Junior High School to support the school's Lonely Boys Concert. Foundation successfully secured funding of \$5,000 from the Hutton Parker Foundation and \$3,500 from the Santa Barbara Foundation in support of the event.

Current Programs & Activities:

Weekly evening cooking class at La Cumbre Junior High School, Healthy Lifestyles & Fitness Track Team & practices, Weekly weight training program in the evenings for adults, April 7th Healthy Lifestyles Track & Field Meet at San Marcos High School for grades 3rd-8th grades and May 4th Third Annual Cinco De Mayo Dinner-Auction.

Your organization's relationships-both formal and informal – with other organizations working to meet the same need. In what way does your work differ from that of other organizations?

There is no other Foundation in the last two years like the La Cumbre Junior High Foundation that has the commitment of informal relationships with the likes of: United Way of Santa Barbara and the City of Santa Barbara, Rotary Club of Santa Barbara, Southern Ca. Gas Company Bega Lighting and others with our work in improving neighborhoods on the Westside (Bohnett Park). The Bohnett Park emphasis we feel is critically important due to its geographical location and proximity to the Westside Boys and Girls Club. This sector of the community is deserving of a safe and more aesthetically pleasing park for children and families that reside on the Westside.

Funding Request

1. What need or problem does your project work to address?

Our Foundation's Healthy Lifestyles and Fitness Program are addressing a major health issue and concern very prevalent in our society. Americans have been inundated in the news regarding the proliferation of diabetes, obesity and heart disease cases that are adversely impacting our youth and adults nationwide. This systemic problem if let unabated will have devastating results on the health and wellbeing of our citizens. Our Foundation through our investment of \$50,000 has renovated the weight room at La Cumbre Junior High School the past two years to upgrade their facility to accommodate the cardio and weight training needs of both La Cumbre Junior High School students and Westside residents. Every student at La Cumbre Junior High School uses the weight room 2-3 times per week and evenings, Monday-Thursday the weight room is made available with an instructor for adults in the community free of charge. Secondly, weight training and cardio exercise needs to be complimented with nutrition. Our Foundation has offered at La Cumbre the past three years a nutritional cooking class that educates La Cumbre parents about food choices and food preparations. Emphasis is placed on shopping smart and learning new techniques in preparing foods with more fiber and less fat.

2. In a short paragraph, tell us your project's (or organization's) goals and Specific outcomes you project for the grant period (i.e. numbers served Behavior or attitudes changed, capital project completed etc.)

Our Foundation goal is to make the La Cumbre Junior High School weight room the best equipped and most functional weight room in the entire Santa Barbara Unified School District. With the purchase of (3) additional spin bikes we will have sufficient spin bikes (8) to offer spin classes for evening adult classes, as well as, be in a better position to serve the cardio needs of La Cumbre Junior High School students. See attached list of equipment to be purchased for weight room. While the quote is for one elliptical machine, there is a good possibility that we will order an additional elliptical because it will greater serve the cardio needs of both students and adults. The weight room currently serves over 500 students each week, 2-3 times per week in P. E. Classes. Secondly, the weight room is used by adults four nights per week with an average of 20-25 participants between 5:00pm-7:00pm daily. We are optimistic that the evening classes may see a 50% increase with additional weight room equipment being added. This may necessitate additional instructional staff support. The purchases made if this grant request is approve will complete the weight room. Our Foundation will ensure that all equipment in the weight room is maintained by establishing a six month inspection program.

3. Describe your project or the capital items requested:

The project is not new. The initial upgrade and renovation of the weight room was implemented in 2011. With approximately \$50,000 already committed to the weight room this request will complete the expansion and will provide the Westside Community with a premiere weight room facility. The targeted audiences are La Cumbre Junior High School students and for the offering in the evening the classes are inclusive of La Cumbre Junior High School parents and adults that reside on the Westside. Evening classes are offered free of charge. Demographically, La Cumbre Junior High School is approximately 70-75% Latino, 25% White and 5% other. The evening classes are 85% Latino, 12% White and 3% other. We are excited about this grant opportunity with the St. Francis Foundation of Santa Barbara. If funding is approved, we will have a ribbon cutting event in the fall (beginning of the school year) and begin at once to market and promote the newly equipped facility both in print and hopeful media coverage from KEYT. Paula Lopez, KEYT Anchor is a graduate of La Cumbre Junior High School and has expressed a desire to provide air coverage of our Healthy Lifestyles Program. If funding is approved we would like to have the installation completed during the summer.

4. How do you plan to evaluate the effectiveness or impact of the project?

Our Foundation will work with the PE staff at La Cumbre Junior High School in designing a pre and post test for all students. Secondly, we will want to know if adult interest has increased in using the weight room. There will be a sign in sheet and an assessment of what exercise machines are being used, and by who (number of males vs. females). As indicated previously, with the purchase of (3) additional spin bikes an evening spin class will be offered 3-4 nights per week. We will track the interest and participation in spin classes. Lastly, we will establish a Healthy Lifestyles Club for adults made up of participating adults in both the weight training, cardio and nutrition classes. La Cumbre Junior High School beginning this spring will establish their own track and field team that will compete in local track and field tournaments.

5. Summarize the skills and relevant experience of key staff/volunteers essential to the project's success:

Healthy Lifestyles & Fitness is performed in coordination with La Cumbre Junior High School Physical Education Instructors. Each year an assessment is made of their needs in the weight room. These credential teachers supervise, coordinate and instruct every phase of the weight training and cardio program. The weight room in the evening has an adult instructor. In addition, with the hiring of a track and field coach for student athletes at La Cumbre we will also be utilizing her skills to assist with cardio exercise and fitness classes in the evening. The Healthy Lifestyles Club Membership will be introduced for the first time next school year and will provide parents with special membership privileges. Each member will need to commit to the weight training, cardio and nutrition classes offered during the evenings, Monday- Thursday. There will be no membership charge! All paid staff and volunteers must be approved by La Cumbre Junior High School Principal.

6. If full funding is not available, what is the contingency plan for securing additional support and/or how can you modify your proposal?

If full funding is not available we will probably want to reduce the number of apparatuses that we have ordered. Secondly, contact some of our donors to solicit their support using the donation from St. Francis Foundation of Santa Barbara as leverage. The initial monetary support for the renovation and equipping the weight room came from the Hutton Parker Foundation and Santa Barbara Foundation. We would therefore, hesitate in seeking their support for this project again.

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Board of Directors/Governing Body

Directions: Attach additional sheets if necessary.

Name	City	Affiliation/Profession	Board Position	Yrs. of Service
Paul Didier	Santa Barbara	CEO United Way of SB	President	Two years
Dorothy Griffin	Santa Barbara	Administrator Law Firm	Served as Treasurer for two years	Two Years
Cliff Lambert	Buellton	Retired	Secretary/Fundraiser	Two Years
Manuel Unzueta	Santa Barbara	SBCC Teacher/Muralist	Served as recording secretary	Two years
Judy Ricker	Santa Barbara	CEO/Property Management	Board Member	Six Months
Marie Boykin	Santa Barbara	Business Manager/Towbes	Current Treasurer	Six Months
Wei-Jara Johnson	Santa Barbara	Owner Tri-County Locksmith	Board Member	Six Months
Mark DePaco	Santa Barbara	Corporate Attorney	Board Member	Six Months
Mark Sherman	Santa Barbara	Entrepreneur	Board Member	Six Months
Frank Quezada	Santa Barbara	Supervisor/City Housing	Board Member	New

How often does your governing body meet? 6 Times Per Year

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Project Budget

Note: Check with each foundation to see if this form is required.

Organization Name: La Cumbre Junior High School Foundation
 Name of Project (if different): Healthy Lifestyles & Fitness
 Budget dates for grant period: April 1 - August 31 - 2013

INCOME

Possible categories: Government grants, foundation grants, individuals, business support, events, fees for service, etc.

Source	Total Project (\$)	Pending (\$)	Secured (\$)	Notes
St. Francis Foundation	\$16,329	\$16,329		
School Jog-A-Thon	\$1,195		\$1,195	
Renee Castagnola	\$1,000		\$1,000	
TOTAL INCOME	\$ 18,524	\$16,329	\$ 2,195	

List the In-Kind (non-cash) contributions: _____

EXPENSES

Possible categories: Salaries, professional fees, rent and utilities, travel, publicity/outreach, events, capital items, etc.

Item	Total Project (\$)	This Request (\$)	Notes
delivery&install	\$795.00		LCJHS Foundation will cover expense.
Hoist Machine	\$2999.00	\$2999.00	One Hoist multi station machine
Hoist Benches	\$1450.00	\$1450.00	Two Benches
Matrix Spin Bikes	\$2,985.00	\$2,985.00	Three Spin Bikes
Matrix Ellipticals	\$4,399.00	\$4,399.00	One Machine
Matrix Abdominal	\$3,549.00	\$3,549.00	One Machine
Freight Charges	\$1,400.00		LCJHS Foundation will cover expense.
Sales Tax	\$947.00	\$947.00	
TOTAL EXPENSES	\$18,524.00	\$16,329.00	

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Organization Financial Summary

Note: Check with each foundation to see if this form is required.

Organization Name: La Cumbre Jr. High School Foundation Fiscal Year Dates: July 1 - June 30th

INCOME

Possible categories: Government grants, foundation grants, individuals, business support, events, fees for service, etc.

Source	Prior Year's Actual	Projected Annual Budget (\$)	YTD Actual (\$) as of [03 / 07 / 13]
Event Income	\$57,747	\$67,000	\$11,483
Board Financial	0	\$3,000	\$100
Healthy Lifestyle	0	\$29,500	\$7,500
Westside Improvements	0	\$1,500	0
Gateway Sponsors	0	\$25,600	\$15,000
TOTAL INCOME	\$57,747	\$126,600	\$34,083

List the In-Kind (non-cash) contributions: _____

EXPENSES

Possible categories: Salaries, professional fees, rent and utilities, travel, publicity/outreach, events, etc.

Item	Prior Year's Actual	Annual Budget (\$)	YTD Actual (\$) as of [/ /]
Business Operations	\$1,718	\$2,100	\$1,836
Professional Accounting	\$2,698	\$3,000	\$664
Events: Cinco de Mayo	\$11,804	\$12,500	\$743
Healthy Lifestyles	\$500	\$29,500	\$6,000
Jog-A-Thon	\$2,922	\$3,000	\$1,480
LCJH Improvements	\$7,230	\$15,000	\$6,150
Surf Camp Sponsor	0	\$2,500	\$2,500
Westside Improvements	\$3,660	\$3,000	\$2,719
Los Lonely Boys Concert	\$16,000	0	0
Gateway Reserve	0	\$25,600	\$15,000
TOTAL EXPENSE	\$46,532	\$96,200	\$22,092
NET PROFIT OR LOSS	\$11,215	\$30,400	\$11,991

Total Capital Expenses	\$00.00	\$00.00	\$00.00
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i.e., computers, vehicles, building improvements, etc.:

Notes:

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Organization Balance Sheet Summary

Note: Check with each foundation to see if this form is required.

ASSETS	MOST CURRENT (\$) as of [3 / 4 / 13]	PRIOR YEAR CLOSE (\$)
Current Assets		
Cash and Equivalents	\$50,717	\$41,300
Accounts Receivable		
Prepaid Expenses		
Inventory		
Grants/Pledges Receivable		
Other		
Fixed Assets (Net)		
Property		
Buildings		
Equipment		
Investments		
Endowments		
Other		
TOTAL ASSETS	\$50,717 0	\$41,300 0
LIABILITIES		
Current Liabilities		
Accounts Payable		
Accrued Expenses		
Long Term Debt (Current Portion)		
Short Term Debt		
Other		
Long Term Debt (over a year)		
Loan		
Other		
TOTAL LIABILITIES		0 0
Net Assets		
Unrestricted	\$50,717	\$41,300
Temporarily Restricted		
Permanently Restricted		
TOTAL LIABILITIES AND NET ASSETS	\$50,717 0	\$41,300 0

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

DEPARTMENT OF THE TREASURY

Date: **APR 28 2010**

LA CUMBRE JUNIOR HIGH SCHOOL
FOUNDATION INC
C/O GARY SMITH
2255 MODOC RD
SANTA BARBARA, CA 93101-3980

Employer Identification Number:
26-2964339
DLN:
17053061316000
Contact Person:
BENJAMIN L DAVIS ID# 31465
Contact Telephone Number:
(877) 829-5500

Accounting Period Ending:
June 30
Public Charity Status:
509(a)(2)
Form 990 Required:
Yes
Effective Date of Exemption:
May 28, 2008
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.

Opti-Fit

4000 Pimlico Drive, Suite 114
 Pleasanton, CA 94588
 805-558-3301

Proposal

Name/Address
La Cumbre Junior High School Jo Ann Caines 2255 Modoc Road Santa Barbara, CA 93101

Date	Proposal #
2/2/2013	10483

TERMS	REP	PROJECT
50%Down50%COD	MA	Matrix

ITEM	DESCRIPTION	QTY	UNIT PRICE	TOTAL
HD1910	HOIST Multi Functional Trainer	1	2,999.00	2,999.00T
CF2160B	HOIST Super Flat/Incline Bench	2	725.00	1,450.00T
TOM-E	MATRIX Tomahawk E-Series Group Bike	3	995.00	2,985.00T
E5xc-02	MATRIX E5xc-02 Commercial Elliptical	1	4,399.00	4,399.00T
MATRIX	MATRIX G3 Abdominal Crunch	1	3,549.00	3,549.00
FR	Freight Charges	1	1,400.00	1,400.00
DI	Delivery and Installation	1	795.00	795.00
	Sales Tax		8.00%	946.64
			TOTAL	\$18,523.64

Acceptance of Proposal-

The above prices and specifications are satisfactory. You are authorized to do the work as specified. Payment will be made by one of the following: Cash, Check or Lease.

SIGNATURE _____



Mark's
FITNESS
SERVICES

Building better bodies and stronger minds everyday.

2219 E. Thousand Oaks Blvd., #433
Thousand Oaks, CA 91362
805-558-3301

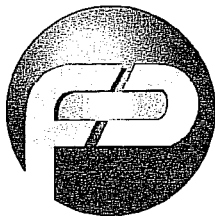
Proposal

Date	Proposal No.
2/2/2013	5010

Name / Address
La Cumbre Jr. High School 2255 Modoc Road Santa Barbara, CA 93101 Attn: Jo Ann Caines

Terms	Rep	Project
Due on receipt	MA	La Cumbre

Qty	Item	Description	Unit Price	Total
1	BH FITNESS	BH FITNESS D300 Dual Pulley	3,499.00	3,499.00T
2	NAUTILUS	NAUTILUS 30/90 Bench	699.00	1,398.00T
3	SCHWINN	Schwinn IC Pro Spinner	999.00	2,997.00T
1	OCTANE FITNESS	OCTANE FITNESS Pro 4700 Commercial Elliptical	4,799.00	4,799.00T
1	NAUTILUS	NAUTILUS S8AB Abdominal	3,299.00	3,299.00T
1	SH/FR	Freight	1,400.00	1,400.00
1	SC	Delivery/Installation	700.00	700.00
		Sales Tax	8.00%	1,279.36
Contact - Mark Alderette 805-558-3301			Total	\$19,371.36



Fitness Pro

560 S. A Street
Oxnard, CA 93030
Direct 805-483-7000 FAX 805-486-2221

Proposal

Bill To:

La Cumbre Foundation
2255 Modoc Road
Santa Barbara, CA 93101

Proposal Date: 2/2/2013**Proposal #:** 5002**Project:** New Equipment 2013**Rep:** AT

Description	Qty	Rate	Total
OCTANE FITNESS Pro 4700 Commercial Elliptical Trainer	1	4,499.00	4,499.00T
BH FITNESS B300 Dual Pulley	1	3,399.00	3,399.00T
NAUTILUS Abdominal (S8AB)	1	3,199.00	3,199.00T
NAUTILUS 30 to 90 Bench (F30-90)	2	679.00	1,358.00T
SCHWINN IC Pro Commercial Indoor Cycle	3	899.00	2,697.00T
Shipping/Freight	1	1,450.00	1,450.00
Delivery/Installation	1	675.00	675.00
Sales Tax		8.00%	1,212.16

Contact - Mark Alderette 805-558-3301

Total**\$18,489.16**