

# Walter S. Johnson Foundation

May 27, 2004

- Mi. Fred Slone  
Workforce Development Manager  
San Mateo County, Human Services Agency  
400 Harbor Boulevard, Bldg. B  
Belmont, CA 94002

Dear Mr. Slone:

We are pleased to inform you that the trustees of the Walter S. Johnson Foundation have approved a grant of \$225,000 to San Mateo County, Human Services Agency. This grant is for the San Mateo County Workforce Investment Board.

- Enclosed are two copies of your grant contract. The contract should be signed and dated by you and a member of your governing board. Please return a copy with original signatures to the foundation and retain one copy for your files.

- Also, please note that the contract indicates approval of subsequent year funding is contingent upon performance satisfactory to the Foundation. Specifically, as part of the annual *review*, the foundation will request information regarding progress made on the attached goals and outcomes and an expenditure report (see enclosed Guidelines for Interim Grant Review). We will forward a reminder letter to you regarding this reporting deadline as the date draws nearer.

We are delighted to support this project and look forward to hearing of its progress.

Sincerely,

Pancho Chong  
Executive Director

Enclosures

## Waiter S. Johnson Foundation Guidelines for Interim Grant Review

The Waiter S. Johnson Foundation is interested in learning about your experiences this past year and asks that you be candid, reflective and as succinct as possible in this interim report. While the specific information of interest to the Foundation is outlined below, your report may, however, extend beyond the topics identified and may address questions that are not applicable to your grant. If you have any questions about this report, contact your program officer. In your report, please be sure to include information from each of the five areas identified below.

- (1) **Goals and Outcomes.** Attached are the goals and outcomes submitted as an addendum to your original proposal. Describe your progress toward each of these goals including any information collected on related outcomes and measure of success. Note any unanticipated challenges encountered in reaching these goals and what adjustments were undertaken, or expect to be undertaken, to address these challenges. If the project was unable to accomplish a specific goal, please explain why. In addition, beyond the goals and outcomes identified, provide a broader discussion of progress made with respect to the core of the project. Briefly summarize the results of any evaluation related to the project undertaken during the interim period.

*Lessons Learned.* Describe the key lessons learned during this interim period. Identify any critical factors that promoted or inhibited the successful implementation of the grant.

- (2) **Revised Goals and Outcomes.** Submit a concise, yet specific, statement of your goals and outcomes for the coming year (see attached Guidelines for Evaluation). The Foundation will again request you report on progress toward these goals at the next interim review (or at the close of this grant).

(3) **Expenditure Report on Current Project Budget.** Attached is a copy of the project budget; please report actual expenditures to date.

(4) **Project Budget for Upcoming Year.** Submit your project budget for the upcoming fiscal year, including confirmed and/or projected revenue sources.

(5) **Financial Statements and Fiscal Year Budgets:** Submit your organization's most recent audited financial statements and current and upcoming fiscal year budgets.

# SAN MATEO CAREER PATHWAYS FOR DISADVANTAGED YOUTH AND ADULTS

## GOALS AND OUTCOMES

### Client Outcomes

Goals	Outcomes
Enable disadvantaged youth and adults to gain the skills necessary to bridge the gap into traditional career training opportunities	<ul style="list-style-type: none"> <li>• Enroll 65 client-teen bridge classes at community colleges</li> <li>• Graduate 80% (52) of those students from the bridge classes</li> </ul>
Provide access and opportunity for clients to move into Life Sciences or Allied Health related career training	<ul style="list-style-type: none"> <li>• Enroll 35 students in allied health or life Sciences career training courses</li> </ul>
Create awareness, opportunity, and ability for clients to pursue post-secondary education opportunities	<ul style="list-style-type: none"> <li>• Enroll 17 students in post-secondary education courses</li> </ul>

### System Outcomes

Goals	Outcomes
Increase the effectiveness and efficiency of employment and educational programs for disadvantaged populations through collaboration and communication among the providers	<ul style="list-style-type: none"> <li>• An increase in the number of collaborative efforts between the Workforce Investment Board, Human Services Agency, and area post secondary education institutions</li> </ul>
“Do more with less.” Provide additional avenues, opportunity, and encouragement for providers and funders to work together, leading to less duplication and a further leveraging of existing efforts	<ul style="list-style-type: none"> <li>• An increase in the number of projects funded through multiple sources, particularly in regards to the key partners mentioned above in employment and educational services.</li> </ul>
Increase the resources for disadvantaged youth and adults to access traditional career training opportunities	<ul style="list-style-type: none"> <li>• Additional bridge programs launched after the end of this project</li> </ul>

WALTERS. JOHNSON FOUNDATION

Organization: Multi-Year Grant Contract

Grant Number: 04-17

The undersigned acknowledges notification of a grant of \$225,000 to be made by the Walter S. Johnson Foundation to:

**San Mateo County, Human Services Agency  
for San Mateo County Workforce Investment Board**

Grant period: May 15, 2004 to August 1, 2005

*Payment of the grant shall be as follows:*

<u>Year.</u>	<u>Date.</u>	<u>Amount</u>
1	08/01/04	37,500
	11/01/04	37,500
	02/01/05	37,500
	05/01/05	37,500
2	08/01/05	37,500
	10/01/05	37,500

*The grant is subject to the following conditions:*

- (1) Funds may be used only for expenses in the attached **budget** incurred, during the grant **period**.
- (2) **Permission to** make any changes in the **'attached budget must be requested in writing.**
- (3) If there are any unanticipated finds **at the end of the grant period, they must be returned to the foundation, or a request for an extension of time in which to spend the funds must be approved by the foundation.**
- (4) **Requests to make changes in the purpose of, the grant shall be considered as a new grant application.**
- (5) **Publicity and/or published materials referring to the project should include acknowledgment of the grant from the Walter S. Johnson Foundation.**
- (6) **Complete records of expenditures should be maintained for at least four years after completion of the use of the grant funds.**
- (7) **Grant funds may not be used to influence legislation or the outcome of a public election.**
- (8) **Approval of subsequent year funding is contingent upon performance satisfactory to the foundation. The grant will be considered for renewal in May, 2005. In preparation for that review we will forward a request for narrative and financial reports several months in advance.**
- (9) **At the end of the grant period, we request that you submit final narrative and financial reports. We have enclosed our Guidelines for Final Grant Review with this contract. You are welcome to submit your own, more comprehensive report in lieu of this abbreviated version...**

WALTER S. JOHNSON FOUNDATION

Organizations: Multi-Year Grant Contract

Grant Number: 04-17..

*The undersigned agrees to the conditions and certifies that*

San Mateo County, Human Services Agency is a branch of government which may receive tax-deductible contributions under **The Internal Revenue Code**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
(SIGNATURE)

\_\_\_\_\_  
(TITLE-SECRETARY)

\_\_\_\_\_  
(BOARD MEMBER)

\_\_\_\_\_  
(ORGANIZATION)

\_\_\_\_\_  
(ORGANIZATION)

\_\_\_\_\_  
(DATE)

\_\_\_\_\_  
(DATE)

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Organizations: Multi-Year Grant Contract

Grant Number; 04-17

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<b>Year</b>	<b><u>Date.</u></b>	<b><u>Amount</u></b>
1	08/01/04	37,500
	<b>11/01/04</b>	<b>37,500</b>
	<b>02/01/05</b>	37,500
	05/01/05	37,500
2	08/01/05	37,500
	<b>11/01/05</b>	37,500

*The grant is subject to the following conditions:*

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**WALTER S. JOHNSON FOUNDATION**

**Organizations:** Multi-Year **Grant Contract'**  
Grant Number: **04-17**

*The undersigned agrees to the conditions and certifies that:*

San **Mateo County**, Human Services Agency **may receive tax-deductible contributions under the Internal Revenue Code.**

\_\_\_\_\_  
(SIGNATURE)

\_\_\_\_\_  
**H. (BO-DMBER)**

\_\_\_\_\_  
(ORGANIZATION)

\_\_\_\_\_  
(DAm)

# SAN MATEO CAREER PATHWAYS FOR DISADVANTAGED YOUTH AND ADULTS

## EIGHTEEN MONTH BUDGET

### EXPENSES :

<ul style="list-style-type: none"> <li>Curriculum development</li> <li>- 127 hours ~ \$63/hr for Bridge class and Allied Health curriculum development, including incorporation of employer feedback.</li> </ul>	\$ 8,000
<ul style="list-style-type: none"> <li>Bridge class program</li> <li>- 3 classes, \$75,000/class, 65 students total</li> </ul>	225,000
<ul style="list-style-type: none"> <li>Customized training</li> <li>- 2 classes, 300 hour training for each class, 40 students ~ \$3,000 per student.</li> </ul>	120,000
<ul style="list-style-type: none"> <li>Paid try-out employment</li> <li>- 40 students @ \$3,250/student. This is 50% of total cost, employer matches the other 50%.</li> </ul>	130,000
<ul style="list-style-type: none"> <li>Client supportive services</li> <li>- For child care, transportation, and other ancillary expenses for clients while in the Bridge class program. 65 students @ \$1,000/student</li> </ul>	65,000
<ul style="list-style-type: none"> <li>Contract Services: Employer development, technical assistance</li> <li>- Services to be provided by Gruber and Pereira, LLC, \$1,200/day for 75 days. For development of employment opportunities at Genentech, recruiting additional life science employers, development of program framework and strategy at new life sciences employers, including customized internships and externship structures.</li> </ul>	90,000
<ul style="list-style-type: none"> <li>Case Management (.8 FTE, County Employee)</li> <li>- includes benefits @ 27%</li> <li>(Benefits include health, insurance, retirement. Sick and vacation days part of salary)</li> <li>Function will include program eligibility, job readiness, resume building, job coaching and interface, candidate recruitment and assessment.</li> </ul>	107,000
<ul style="list-style-type: none"> <li>Program management (1.0 FTE, County Employee)</li> <li>- includes benefits @ 27%</li> <li>Overall program coordination including defining roles and responsibilities, oversight of subcontractors, MIS tracking, fiscal and contract monitoring of multiple funding sources and preparing required fiscal and program reports.</li> </ul>	125,000
<ul style="list-style-type: none"> <li>Operating Expenses</li> <li>- includes costs for telephone and automation, services and supplies.</li> <li>- WSJF will not be billed for this expense item.</li> </ul>	30,000
<b>TOTAL EXPENSES</b>	<b><u>\$900,000</u></b>

### FUNDING (REVENUE)

Walter S. Johiison Foundation grant	\$225,000
San Mateo County youth funding (in-kind)	\$100,000
San Mateo Workforce Investment Act (in-kind)	\$40,000
Federal Chafee grant	\$50,000
Federal Pell grant	\$100,000
Regional Allied Health EDD grant (proposed)	\$275,000
William and Flora Hewlett Foundation (proposed)	<u>\$110,000</u>
<b>TOTAL FUNDING</b>	<b>~ _____</b>



**WSJ Grant**  
**Salary & Benefits %'s**

	% of Total
Salary:	<b><u>S&amp;B</u></b>
4111 Regular Perm Positions	<u>72.8%</u>
<b>Benefits:</b>	
4451 Unemployment Insurance	0.2%
4311 FICA	4.5%
4312 Medicare Contribution	1.1%
4511 Workers Comp Ins Contrib	0.5%
4321 County Retirement Contrib	12.1%
4412 Kaiser Health Plan	7.5%
4422 County Dental Plan	1.0%
4431 Vision Insurance Plan	0.2%
4441 Life Insurance Plan	<b>0.1%</b>
4442 Long Term Disability	<b><u>0.2%</u></b>
	<b><u>27.2%</u></b>
<b>Total Salary &amp; Benefits</b>	<b>100.0%</b>