Empower. Uplift. Unite.

Lifting Spirits. Spreading Joy.

Family Giving Tree™

CASE STATEMENT
Holiday Wish Drive 2023

fgt.org

Nearly 3.5 million Bay Area residents qualify as either low-income or very low-income.[1] For families making less than $108,000, the qualifying salary for subsidized housing, budgets have been worn thin. Employment decreases among lower-paying jobs, skyrocketing rent prices, and general costs of living have made it difficult for six out of ten very low-income adults to cover usual expenses.[2]

Most of the wages earned are spent on housing costs. San Jose recently replaced New York City as the most expensive city in the nation; the median rent is now $3,400 a month. With the increased gas and food prices, there is barely anything left over to provide something joyful, like a wished-for holiday gift or the necessary school supplies for children to succeed in the classroom. Rents and living costs throughout the San Francisco Bay Area make it almost impossible for many households to afford anything else.

3.5 million residents in the Bay Area are struggling. Within this economic environment, the pressures are compounded by the lingering effects of the pandemic and highlight the inequity in Silicon Valley. The health, budgets, and quality of life of many parents and individuals working frontline jobs are at stake. Facing instability, such people in Bay Area communities are at the highest risk of experiencing depression and anxiety in connection to stressful financial-related uncertainties around food and housing insecurities.[3]

1 Bay Area Equity Atlas. "Who is Low Income and Very Low Income in the Bay Area? (An Updated Look). January 27 2023. Accessed September 2023

2 NBC Bay Area. "Some Bay Area Populations Struggling Financially in Post-COVID Economy." https://www.nbcbayarea.com/news/local/bay-area-covid-financial-recovery/3193391/. Published March 2023. Accessed September 2023

3 Marbin, Derin, et al. "Perspectives in Poverty and Mental Health." Frontiers in Public Health, vol. 10, 2022, p. 975482, https://doi.org/10.3389/fpubh.2022.975482. Accessed 13 Sept. 2023.

Family Giving Tree (FGT) believes everyone should experience the joy of the holidays through a wished-for gift. With your help, we aim to uplift families and individuals working to overcome the obstacles of economic insecurity in the greater San Francisco Bay Area. Fulfilling a holiday gift-wish may seem like a small gesture, but it's everything to the child, senior, or adult transitioning from homelessness who may not otherwise receive a gift. That single, specially chosen present creates a ripple effect and lets them know that someone in the community cares.

Through fulfilling exact wished-for gifts and providing backpacks filled with STEAM-based school supplies to meet student needs, FGT inspires community kindness and generosity and highlights the power of collective volunteerism. Last year, we spread holiday joy to over 56,000 individuals throughout the Bay Area! We hope to spread more joy this holiday season by reaching additional individuals experiencing financial hardships.

Mission: Connecting those who can give to those in need with educational support, gifts, and volunteerism.

Vision: We envision a world where giving brings joy, offers hope, and creates learning possibilities.

Values

Community: We foster an inclusive culture of volunteerism and philanthropy with people of all ages and backgrounds. We strive to inspire people to "pay it forward" by uplifting others in our community.

Kindness: We demonstrate genuine empathy and compassion in all that we do. We are advocates for treating people with respect and consideration. We make giving back a joyful experience.

Empowerment: We recognize that we don't all start from the same place in the world. Through community alliances, we provide those we serve with gifts and tools to give them the equitable opportunity to dream and grow.

Adaptability: We collaborate creatively to adapt and provide relevant resources to meet community needs. Family Giving Tree tests new ideas and explores innovative ways of delivering value to our community.

Accountability: We take the initiative to meet our commitments to each other and our volunteers, agencies, donors, and community. We are responsible stewards of the gifts we receive on behalf of those we serve.

Holiday Wish Drive

Statement of Need

In Santa Clara, a family of four making between $50,550 and $84,250 is considered very low-income.[4] In addition to the inflated costs of goods due to economic circumstances, the average rent for a one-bedroom apartment in Santa Clara increased by 12%, costing $34,104[5] a year. The families who had already been struggling to keep food on the table and pay rent are finding it increasingly difficult, leaving already strained budgets with no room for joyful family traditions like gift-giving during the holidays.

The impact of a wished-for gift can lift a family's spirits and allow them to create holiday memories and celebrate the season. **In an article by the Dana Foundation, psychologists found, "Numerous studies of children in the US across decades have shown striking correlations between poverty and less-than-optimal physical and mental health and developmental outcomes."[6]** During hardships, the stability of social support, such as maintaining holiday traditions, is key to managing mental health and keeping debilitating stress and anxiety at bay.

4 Silicon Valley At Home. "Area Median Income & Eligibility for Affordable Housing." Updated May 25, 2022. Accessed: September 2023.

5 Rent. "Renter Market Trends". Updated August 31, 2022. Accessed: September 2023.

6 Dana Foundation. "Poverty and the Developing Brain." Published: April 15, 2022. https://dana.org/article/poverty-and-the-developing-brain/

Average Monthly Expenditures for a Family of Four

☐	💲	Salary (Two Parent Household)	$4,772
☐	🏠	Rent	$2,842
☐	💡	Utilities (Gas/Electricity)	$192.03
☐	💧	Water	$100.64
☐	🗑	Sanitation/Garbage	$41.41
☐		Food	$977
☐		Gas	$259.48
☐	🚗	Car Insurance	$107.41
☐	📱	Cellular Service	$114

TOTAL AFTER EXPENSES* **$138.03**

*Does not include Health insurance, out-of-pocket medical costs, internet, allocation of additional savings, 401k, or child care costs.

Holiday Wish Drive

DEMOGRAPHICS

ETHNICITIES SERVED

- Race Unknown 4.4%
- 2 or More Races 5.4%
- Pacific Islander 7.8%
- American Indian 2.9%
- White 9.4%
- Other 2.0%
- Asian 12.0%
- Black 21.3%
- Hispanic 34.8%
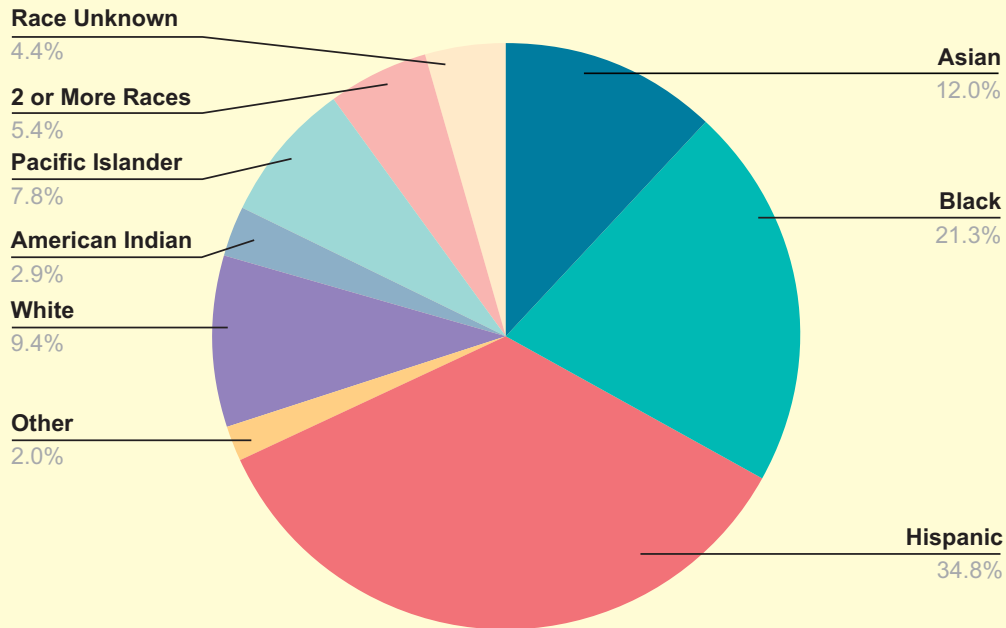
GIFTS DISTRIBUTED BY AGE

Age Group	Percentage	Count
Infants	2.3%	588
Toddlers	12.9%	3,258
Pre-schoolers	22.2%	5,601
Middle Childhood	31.9%	8,039
Young Teens	13.5%	3,389
Teenagers	3.9%	979
Young Adults	2.1%	518
Adults	3.7%	929
Seniors	7.5%	1,883

GENDER

Male	49.2%
Female	46.9%
Not shared	4%
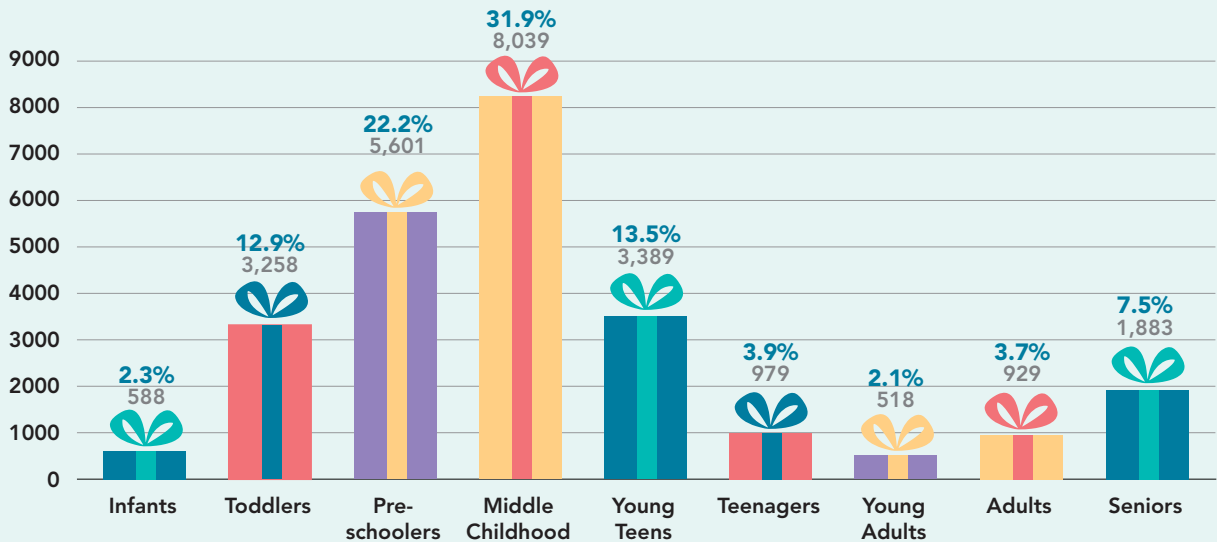
COUNTIES SERVED

Alameda
Contra Costa
Marin
Monterey
Sacramento

San Francisco
San Benito
San Mateo
San Joaquin
Santa Clara

Santa Cruz
Solano
Sonoma
Stanislaus

Why Family Giving Tree?

FGT Co-founders Jennifer Cullenbine and Todd Yoshida.

What began 33 years ago as an MBA project for our Founder and CEO, Jennifer Cullenbine, and provided 2,010 gifts in East Palo Alto in that inaugural year has expanded to over fourteen counties throughout the Bay Area, reaching over 2 million recipients. In addition to children, Family Giving Tree (FGT) spreads joy through wished-for gifts to adults experiencing homelessness, seniors experiencing financial hardships, and individuals with special needs.

FGT utilizes a structure that creates bridges within the community, connecting people, organizations, and businesses throughout the greater San Francisco Bay Area to impact families and individuals across 14 counties collectively. Anyone can register as a Drive Leader to fulfill and collect wishes and monetary donations, as no fees or minimum donation requirements exist. In early December, these frontline advocates deliver collected items to our donated Holiday Wish Drive Warehouse or at one of our single-day remote drop-off locations throughout the Bay Area.

In 2022, despite the continued challenges connected with the pandemic, with the help of more than 450 Bay Area nonprofit agencies and schools, 4,969 volunteers, and 1,002 individuals, groups, and businesses that helped us lead drives—we spread holiday joy to over 56,000 individuals and equipped more than 28,600 at-promise Bay Area students with supply-filled backpacks.

As we actively work to inspire the values of kindness, philanthropy, and volunteerism in our community, thanks to our unique program model that relies on collective community support, we're able to connect and serve thousands, despite a small staff of less than 20.

1 FGT interviews each recipient agency to ensure gifts are distributed to those who ask for them.

2 Wishes from recipients at over 400 partner agencies enter our database starting in August.

3 All wishes are printed and distributed by November.

In acting out our mission statement of promoting volunteerism, our model allows Bay Area residents to impact their communities directly. **Since FGT inclusively opens volunteering to all ages, families can volunteer side-by-side, showing that everyone can make an impact in the community.**

Improved Virtual Giving Tree

Our Virtual Giving Tree (VGT) is a proprietary giving tool where community members can track their progress as individuals "shop" for items online and help us deliver the tools for learning and gifts that bring joy in this ever-changing virtual environment. It continues to be a successful tool for fundraising in lieu of supporters donating physical gifts, backpacks, and school supplies. The funds raised through the VGT help cover the costs of prepurchased items from our vendors described in the next section, allowing us to forecast what FGT can buy ahead of time and make additional purchasing decisions in real-time.

We surveyed Drive Leaders for the Back-to-School and Holiday Wish Drive and used their feedback to improve the Virtual Giving Tree. Improvements include reporting features accessible to Drive Leaders, sorting gifts by multiple categories, and customizing donation amounts. Through the VGT, Drive Leaders can set goals for their drive and pull reports to track progress. These features enhance the user experience for Drive Leaders and donors alike.

Wish App

Other technology we invested in includes our proprietary Wish App. This app allows FGT's partner agencies to assign first and second wish choices from our list of gifts to their clients. Once an agency has finalized its selections, the data is auto-populated into our database. FGT's Agency Coordinators review the data. If all necessary information, such as age, name, etc., is correct, "gift recipients" for that agency are assigned to gifts which are then sorted in our warehouse. Once all of our agencies have been approved and assigned, we can schedule pick-up times with the click of a button.

RFID Tracking Codes

In November 2021, we started utilizing Radio Frequency Identification (RFID) for our 2021 Holiday Wish Drive wish cards. Each physical wish card sent to Drive Leaders has a unique RFID code. When gifts are returned to the warehouse with the wish card attached, they are automatically scanned, and the wishes are marked fulfilled in our Salesforce database, giving us a real-time sense of the number of gifts in our warehouse.

Ensuring the Impact of Every Donated Dollar:

We have negotiated bulk purchase agreements with several manufacturers, allowing us to purchase more supplies for each donated dollar. We can order school supplies and many popular gift items in bulk at 40-69% below retail prices through our partnerships with our vendors. These savings allow us to help more students. When our community commits to supporting HWD, they leverage our purchasing power.

"During this year I have been so proud of my achievements. I learned about my faults and how to fix them. I learned to be a dad that my son is counting on. And I just finished one semester at Mission College and earned 16 credits with all A's. During these hard times, the gifts mean the world to my family, especially when we know there are people out there who put the time and effort out to care for others and don't ask for anything in exchange. The gifts are especially important because although everyone says it's the thought that counts, it's really the smile on my son's face when he sees his new toy car that warms my heart. It's seeing my son's happiness. A little goes a long way."

CLIENT FROM ALUM ROCK COUNSELING SERVICES

Our goal is to reach at least **44,000** individuals this holiday season.
Here are a few ways you can help empower, uplift, and unite our community.

Contribute Financially
https://familygivingtree.org/donate
- Monthly giving
- Corporate matching & Drive sponsorship
- Proceeds of stocks
- Proceeds from property sale
- Donor Advised Funds
- Planned gifts/beneficiaries

Donate Items
https://familygivingtree.org/our-programs/
holiday/most-needed-gift-list
- Check our website for updates on the most-needed gifts

Volunteer or Run a Drive
https://familygivingtree.org/get-involved
- Host a Wrapping Party, Collect donations, Set up your Virtual Giving Tree - choose one or do all three!
- Sort, quality check, wrap and prepare the holiday gifts for distribution in our warehouse.
- Learn about opportunities to serve on our Board of Directors or committees.

Build Awareness
http://familygivingtree.org
- Follow, subscribe, and share Family Giving Tree's emails and social media posts.
- Become a PSA (Public Service Announcement) Sponsor
- Newsletter Sign-Up
- Invite your friends to volunteer with you
- Tell your friends about us!

Family Giving Tree

Leadership

Jennifer Cullenbine
CEO and Founder

Jill Mitsch
Deputy Director

Jess Gutierrez
Chief Financial Officer

Charlotte Wood
Director of Devlopment and Marketing

Staff

Amelia Capsuto
Development Manager

Celeste Delamore
Agency Coordinator II

Evelyn Hernandez
Agency Coordinator

Evelyn Huynh
Community Partnerships Manager

Kristina Afzal
Salesforce Tech Support Specialist

Kim Foster
Development Associate

Liza Levin
Executive Assistant

Margarita Galindo
Institutional Giving Officer

Shannon Fey
Volunteer Coordinator

Sofia Rocha
Programs Manager

Tennille Frye
Bookkeeper/Payroll Specialist

MikeyJ Smith
Community Marketing Coordinator

Ashley Jacques
Community Drive Coordinator

Board of Directors

BOARD CHAIR
Andrea Borch

FINANCE COMMITTEE CHAIR
Dominic Mills
Partner at Grant Thornton LLP

Mona Taylor
Senior Vice President Global Human Resources at NeoPhotonics

Sachi Patel
Trust Solutions Director at PwC

Shelene Huey-Booker
Executive Director at Youth Utilizing Power and Praise

Andrea Gray
Associate Director of Finance & Adminstration, Center for International Security and Cooperation at Stanford University

Malcolm Humphrey
Vice President and General Manager at Micron Technologies

Gagen Sekhon
Payment and Fraud Product Manager at Upgrade Inc.

John Mansperger
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