CITY OF COACHELLA, CA
COMMUNITY BASED GRANT PROGRAM
APPLICATION FOR FUNDS REQUEST

Please Type Information and Print
Information entered in the provided spaces cannot be saved.

(Attach additional pages as needed, however applicants are encouraged to be brief.)

1. **Application Funding Cycle:** **Date:** July 31, 2026

   July 1, 2026- June 30, 2027

2. **Total Amount Requested:** $ 1,000

   If requesting waiver of City fees or charges, please indicate the City service for which the waiver is being requested.

3. **Proposed Program/Service of Funding Request:**

The requested funds will help an underserved, City of Coachella student overcome financial barriers to higher education and gain the knowledge, opportunities, and career pathway needed to build a brighter future for themselves, their family, and their community.

4. **Agency/Organization:**

   Carreón Foundation

5. **Mailing Address:**

   41550 Eclectic Street

   City: Palm Desert **Zip:** 92260

6. **Telephone:** 858.344.4812

   Fax: N/A

7. **Official Contact Person:**

   Name: Ricardo Loretta

   Title: Executive Director

   Telephone:
   858.344.4812

   Fax: N/A

   E-mail: carreonfoundation@gmail.com

8. Does this organization have a non-profit status with the Internal Revenue Service (IRS)?
Yes ☒ No ☐ (Attach documentation) ☐

9. How long has this organization been in existence?
The Carreón Foundation was established in 1991 and has served students from the Coachella Valley and surrounding communities for approximately 35 years.

10. Has the organization previously received funding from the City of Coachella?
☐ **Yes** ☒ **No**
If yes, please identify the program/service, total prior grant allocation, and the fiscal year in which the funds were received. -
N/A

11. Is this request for a ☐ New or ☒ Existing program/service within the City?

12. What is the anticipated time frame to provide the proposed program/service and the expenditure of the requested funds?
The program will operate during the 2026–2027 fiscal and academic year. The Foundation will select an eligible City of Coachella student, provide scholarship and student-success support, and expend the requested funds no later than June 30, 2027.

13. Describe briefly how the requested funds will be used.
The requested $1,000 will provide direct scholarship assistance to a low-income or otherwise underserved student residing in the City of Coachella. Funding will help the student meet postsecondary education expenses such as tuition, required books, educational supplies, technology, and transportation. No City funds will be used for salaries, benefits, fundraising, or general administrative expenses.

14. Will the program/service require additional funding sources? If so, identify all funding sources and provide the steps taken to acquire funding.
Yes. The Foundation will combine the City's $1,000 award with its own secured charitable donations and scholarship funds to provide a larger scholarship award, with Foundation resources covering both the required dollar-for-dollar match and any additional amount awarded to the student. The project will also be supported through established partnerships with individual donors, businesses, charitable foundations, municipal partners, and OneFuture Coachella Valley. Documentation demonstrating at least $1,000 in secured matching support will accompany the application.

15. If the program/service is planned to continue beyond the period provided by this grant, what funding plans are there to sustain the program/service?
The Carreón Foundation has operated its scholarship program since 1991 and sustains it through individual contributions, business and foundation grants, community partnerships, municipal support, fundraising activities, and annual board commitments. The Foundation will continue seeking diversified funding to ensure scholarship and student-success services remain available to Coachella youth after the City grant period.

16. How will the proposed program/service serve City of Coachella residents? Will the proposed program/service also serve non-Coachella residents? Please describe.
The City's entire $1,000 award, together with the required match, will directly support a student whose primary residence is within the City of Coachella. The student will receive financial assistance and access to advising, mentoring, financial-aid guidance, career planning, and other college-success resources. Although the broader Foundation program serves students throughout the Coachella Valley and Eastern Inland Empire, City grant funds will be restricted to a verified Coachella resident. During the 2024–2025 academic year, four City of Coachella residents received Carreón Foundation scholarships, demonstrating the Foundation's established record of directly serving the city's youth.

17. Describe the characteristics of the clients the proposed program/service anticipates to serve (i.e. age group, gender, income level, ethnicity, etc.)

The program primarily serves high school seniors, college students, and vocational students from low-income and historically underserved communities. Participants include first-generation college students and students from Latino, Native American, African American, Asian American, and other backgrounds who face financial barriers to postsecondary education.

In the Foundation's recent cohort, 86% of scholars identified as Hispanic or Latino, 64% were female, 36% were male, and 36% were first-generation college students. The cohort achieved a 98% academic-year persistence rate. The selected participant for this City-funded project will be a verified City of Coachella resident with demonstrated educational commitment and financial need.

18. Attach a proposed budget for requested funds.

Attached

Authorized Official: Ricardo Loretta **Title:** Executive Director

Signature: Ricardo Loretta **Date:** 7/31/2026

PROPOSED PROJECT BUDGET

Dr. Reynaldo J. Carreón Foundation

City of Coachella Student Scholarship and Success Program

CITY REQUEST	FOUNDATION LEVERAGE	TOTAL SCHOLARSHIP
$1,000	**$2,000**	**$3,000**

Funding Sources

Funding Source	Amount
City of Coachella Community Based Grant	$1,000
Carreón Foundation secured scholarship funds	$2,000
Total Project Funding	**$3,000**

Project Expenses

Expense	Amount
Direct scholarship assistance for one City of Coachella student	$3,000
Total Project Expenses	**$3,000**

Budget Narrative

The City of Coachella's $1,000 investment will leverage $2,000 in secured Carreón Foundation scholarship funds, creating a $3,000 scholarship for one student residing in the City of Coachella.

All requested City funds will support direct scholarship assistance. No City funds will be used for salaries, benefits, fundraising, or general administrative expenses.

CARREON FOUNDATION Since 1991

Spark Good Grants Team
Spark Good Local Grant to Facility #8958 Status Update - Application ID 92292974
To: Matt Phillips, Cc: carreonfoundation@gmail.com

Inbox - iCloud March 9, 2026 at 2:01 PM

Details

Spark Good Local Grant to Facility #8958 Status Update – Application ID 92292974

Dear MATT,

Congratulations! Your Spark Good Local Grant request to Facility #8958 has been approved, and you will be receiving a $1500 grant.

The grant funds will be sent via electronic payment to the bank account set up with JPM. Please save the payment ID #132094866278347 for future use.

We encourage you to share the positive impact this grant will have on our community. Before moving forward, please review the Local Grant Recognition Toolkit. This provides brand and recognition guidelines agreed upon when applying for the grant as well as helpful tips for acknowledging Walmart or Sam's Club for this grant.

Visit Walmart.com/nonprofits to discover additional ways Spark Good may be able to support your organization.

Once again, congratulations on your grant, and thank you for your valuable contributions to the community.

Sincerely,
The Spark Good Team

3

INTERNAL REVENUE SERVICE
DISTRICT DIRECTOR
P O BOX 2350 ROOM 5127 ATTN: E.O.
LOS ANGELES, CA 900532350

DEPARTMENT OF THE TREASURY

Date: APR. 8, 1991

REYNALDO J CARREON MD FOUNDATION
C/O REYNALDO J CARREON MD
46-976 MONROE ST
INDIO, CA 92201

Employer Identification Number:
33-0426210
Case Number:
951058012
Contact Person:
TERRY IZUMI
Contact Telephone Number:
(213) 725-6641

Accounting Period Ending:
December 31
Foundation Status Classification:
See attached
Advance Ruling Period Begins:
July 5, 1990
Advance Ruling Period Ends:
Dec. 31, 1994
Addendum Applies:
no

Dear Applicant:

Based on information 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 be expected to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during an advance ruling period. 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 submit to us 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, you will be classified 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, you will be classified as a private foundation for future periods. Also, if you are classified as a private foundation, you will be treated as a private foundation from the date of your inception for purposes of sections 507(d) and 4940.

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

If notice that you will no longer be treated as a publicly supported organization is published in the Internal Revenue Bulletin, grantors and contributors may not rely on this determination after the date of such publication. 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 the Service 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 such knowledge was acquired.

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

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration 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 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 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.

Contribution deductions are allowable to donors 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. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

You are required to file Form 990, Return of Organization Exempt From Income Tax, only if your gross receipts each year are normally more than $25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, 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 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 $10 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 $5,000 or 5 percent of your gross receipts for the year, whichever is less. 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 need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

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 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,

Michael J. Quinn

Michael J. Quinn
District Director

Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See *Specific Instructions* on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

Reynaldo J Carreon MD Foundation

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . . ____

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☑ Other (see instructions) 501c3

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . ☐

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) ____

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) ____

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions.

41550 Eclectic St

6 City, state, and ZIP code

Palm Desert, CA 92260

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

___ - __ - ____

or

Employer identification number

33 - 0426210

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person** [signature] **Date** August 17, 2025

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they