



# Agenda

## MEETING OF THE SAN MARCOS COMMUNITY FOUNDATION

**WEDNESDAY, NOVEMBER 9, 2016 – 6:00 P.M.**

### **MEETING OF THE SAN MARCOS COMMUNITY FOUNDATION**

#### **GRANT FUNDING COMMITTEE**

**SAN MARCOS ROOM**

**1 CIVIC CENTER DRIVE**

**SAN MARCOS, CA 92069**

**Cell Phones:** As a courtesy to others, please silence your cell phone or pager during the meeting and engage in conversations outside the meeting room.

**Americans with Disabilities Act:** If you need special assistance to participate in this meeting, please contact the Board Secretary at (760) 744-1050, ext. 3116. Notification 48 hours in advance will enable the City to make reasonable arrangements to ensure accessibility to this meeting. Assisted listening devices are available for the hearing impaired. Please see the Board Secretary if you wish to use this device.

**Public Comment:** If you wish to address the Board on any agenda item, please complete a “Request to Speak” form. Be sure to indicate which item number you wish to address. Comments are limited to FIVE minutes.

The Oral Communication segment of the agenda is for the purpose of allowing the public to address the Board on any matter NOT listed on the agenda. The Board is prohibited by state law from taking action on items NOT listed on the Agenda. However, they may refer the matter to staff for a future report and recommendation. If you wish to speak under “Oral Communications,” please complete a “Request to Speak” form as noted above.

**Agendas:** Agenda packets are available for public inspection 72 hours prior to scheduled meetings at the Administration Department located on the second floor of City Hall, 1 Civic Center Drive, San Marcos, during normal business hours.

## AGENDA

### **CALL TO ORDER**

### **ROLL CALL**

### **OLD BUSINESS**

#### **1. GRANT AWARD HISTORY**

*Recommendation:* **NOTE & FILE**

### **NEW BUSINESS**

- #### **2. MINI-GRANT PROPOSALS**
- Consider three (3) mini-grant proposals by nonprofit organizations requesting funds from the Foundation.
-

**(A) TERI, INC.** – Request for funding in the amount of \$1,500.00 to expand its Microgreens Social Enterprise program.

**Recommendation: CONSIDER/RECOMMEND**

**(B) SAN MARCOS HIGH SCHOOL PTO** – Request for funding in the amount of \$1,500.00 to support “San Marcos High School Grad Nite 2017” at Disneyland.

**Recommendation: CONSIDER/RECOMMEND**

**(C) SAN MARCOS UNIFIED SCHOOL DISTRICT FOR THE MISSION HILLS HIGH SCHOOL LINK CREW** – Request for funding in the amount of \$1,500.00 to purchase t-shirts for Link Crew Leaders.

**Recommendation: CONSIDER/RECOMMEND**

**3. REGULAR GRANT APPLICATION PROPOSALS** Consider six (6) Regular Grant proposals by non-profit organizations requesting funds from the Foundation. Recommend funding to the SMCF Board.

**(A) CANINE COMPANIONS FOR INDEPENDENCE SOUTHWEST** – Request for funding in the amount of \$5,000.00 to place one skilled dog with a San Marcos resident in need.

**Recommendation: CONSIDER/RECOMMEND**

**(B) PALOMAR HEALTH FOUNDATION** – Request for funding in the amount of \$4,050.00 to fund the training of staff to become facilitators and educate the community on preventing, identifying, and reporting child abuse.

**Recommendation: CONSIDER/RECOMMEND**

**(C) THE KID’S COLLEGE** – Request for funding in the amount of \$5,000.00 to continue the implementation and expansion of the Fortissimo Orchestral Music Program in SMUSD Title 1 schools.

**Recommendation: CONSIDER/RECOMMEND**

**(D) ALZHEIMER’S SAN DIEGO** – Request for funding in the amount of \$10,000.00 to address Alzheimer’s and dementia within the San Marcos community through the Safety and Independence workshop.

**Recommendation: CONSIDER/RECOMMEND**

**(E) SOLUTIONS FOR CHANGE** – Request for funding in the amount of \$8,000.00 to support a youth mentorship program for formerly homeless youth.

**Recommendation: CONSIDER/RECOMMEND**

**(F) RESTORATIVE JUSTICE MEDIATION PROGRAM** – Request for funding in the amount of \$10,000.00 to train 40 teachers from San Marcos schools in restorative practices through the Discipline That Restores program.

**Recommendation: CONSIDER/RECOMMEND**

**CONSENT CALENDAR**

4. **WAIVER OF TEXT** This item is to waive the reading of the text of all Resolutions and Policies adopted at this meeting. Resolutions and Policies shall be **adopted** by title.  
*Recommendation: WAIVE*
5. **APPROVAL OF MINUTES** SMCF Grant Funding Committee Meeting, October 13, 2016.  
*Recommendation: CONSIDER/APPROVE*
6. **ORAL COMMUNICATIONS** Speakers are limited to five minutes. Please complete a "Request to Speak" form and place in basket provided. According to Board policy, **FIFTEEN** minutes has been established during this portion of the Agenda to allow citizens to speak on any matter **NOT** listed. The Board is prohibited by state law from taking action on items **NOT** listed on the Agenda. However, they may refer the matter for a future report and recommendation.

#### **ITEMS FOR THE GOOD OF THE ORDER**

7. **NEXT MEETING DATE**

The next meeting of the Grant Funding Committee is scheduled for Wednesday, January 11, 2017. The next meeting of the SMCF Board of Directors is scheduled for Tuesday, November 15, 2016.

8. **MISCELLANEOUS**

9. **ADJOURNMENT**

AFFIDAVIT OF POSTING  
STATE OF CALIFORNIA     )  
COUNTY OF SAN DIEGO   ) ss.  
CITY OF SAN MARCOS     )

I, Michael Gordon, Secretary of the San Marcos Community Foundation Grant Funding Committee, hereby certify that I caused the posting of this agenda in the glass display case at the north entrance of City Hall on Thursday, November 3, 2016, at 5:00 pm.

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Michael Gordon, Secretary - SMCF

**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Award History FY2016-2017**

Organization	Type	Award	Date	Name of Project	Summary of Project
Luminary Arts Corporation	Mini	\$1,500.00	8/10/2016	Elementary Arts Education Classroom Instruction	To provide elementary arts education classroom instruction program at three San Marcos elementary schools. Serves 2,100 San Marcos residents.
Riding Emphasizing Individual Needs & Strengths (REINS)	Mini	\$500.00	8/10/2016	Therapeutic Horsemanship Program	To provide a scholarship for a student to ride in the Therapeutic Horsemanship Program. Serves 1 San Marcos resident.
Rancho Santa Fe Foundation	Regular	\$2,800.00	8/16/2016	North County Senior Connections	To help fund the North County Senior Connections program to provide access to food for vulnerable seniors. May serve up to 1,327 San Marcos residents.
North County Health Services	Regular	\$4,700.00	8/16/2016	ECG Machine	To purchase a new electrocardiograph (ECG) machine at its San Marcos Health Center. Serves 13,521 San Marcos residents.
Cal State University San Marcos Foundation	Regular	\$2,500.00	8/16/2016	The Alliance to Accelerate Excellence in Education at CSUSM: Roadshows and Coaching Cadres	To offer college readiness assemblies to 8th grade students and train current CSUSM students to support graduating San Marcos high school seniors transitioning to college. Serves 2,900 San Marcos residents
San Marcos Historical Society	Mini	\$894.00	10/13/2016	Ongoing Preservation Initiative	To purchase collection management software and training CDs. The group serves over 1,000 San Marcos residents.
Total Grants Awarded FY16-17		\$12,894.00			



## Summer Quarter 2016-2017: Funding Recommendation Worksheet

Asset Balance on 6/30/2016:	\$1,152,765
Available for Distribution for FY16-17:	\$46,111-\$57,638
Total FY16-17 Distributions Year to Date:	\$12,894.00
Total Remaining Funds for Quarter if Awarding Grants at 4% of Assets Available:	\$10,476
Total Remaining Funds for Quarter if Awarding Grants at 5% of Assets Available:	\$14,318

Name	Requested Amount	Type	Name of Project	Summary of Project	GFC Funding Recommendation
TERI	\$1,500.00	Mini	Need for Seeds -- TERI's Agriculture/Microgreens Enterprise	To expand its microgreens program into the San Marcos community. Serves 78 San Marcos residents.	
San Marcos High School PTO	\$1,500.00	Mini	SMHS Grad Nite 2017	To help fund San Marcos High School's "Grad Nite" at Disneyland. Serves 558 San Marcos residents.	
Mission Hills Link Crew (San Marcos Unified School District as the fiscal sponsor)	\$1,500.00	Mini	Mission Hills Link Crew	To purchase 150 t-shirts for the Mission Hills High School Link Crew. Serves 150 San Marcos residents.	
Canine Companions for Independence	\$5,000.00	Regular	Team Training	To place one skilled dog with a San Marcos resident in need. Serves 1 San Marcos resident	
Palomar Health Foundation	\$4,050.00	Regular	Forensic Health Services	To fund the training of staff to become facilitators and educate the community on preventing, identifying, and reporting child abuse. Served 58 San Marcos residents in 2015.	
The Kid's College	\$5,000.00	Regular	Fortissimo Orchestral Music Program for SMUSD	To fund the continuation, implementation, and expansion of the Fortissimo Orchestral Music Program in SMUSD Title 1 schools. Serves 200 San Marcos residents.	
Alzheimer's San Diego	\$10,000.00	Regular	Addressing Alzheimer's and Dementia within the San Marcos community	To fund the Safety and Independence workshop to address Alzheimer's and dementia within the San Marcos community. Serves 835 San Marcos residents.	
Solutions for Change	\$8,000.00	Regular	Youth Mentoring	To support a youth mentorship program for formerly homeless youth. Serves 30 San Marcos residents.	

Restorative Justice Mediation Program	\$10,000.00	Regular	Teacher Training in Restorative Practices	To train 40 teachers and administrators from 4 San Marcos schools in restorative disciplinary practices. Serves 1,164 San Marcos residents.	
<b>Total Grants Requested:</b>		<b>\$46,550.00</b>		<b>Recommended Funding:</b>	<b>\$</b>

**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**



(Choose one) ☒ **MINI-GRANT**    (Choose one) ☐ **REGULAR GRANT**

Project Name: <i>Need for Seeds-TERI's Agriculture/Microgreens Enterprise</i> Date Submitted: <i>October 5, 2016</i>	Total # of people served: <i>TERI serves 600+ students &amp; families monthly, 200 of those involved with the Agriculture Program, 13 Microgreens Customer Restaurants</i>  Total # of San Marcos residents served: <i>78</i>	Amount Requested: <i>\$1,500</i>
Non-Profit Organization Name and Address, Website <i>TERI</i> <i>251 Airport Road, Oceanside, CA 92058</i> <i>www.teriinc.org</i>	Contact Person – Name, Title & Phone, email <i>Ashley Klein -Marketing, Communications &amp; Development</i> <i>760-547-1892</i> <i>ashleyk@teriinc.org</i>	
<p><u>Briefly</u> describe your request for funds (to be expanded upon in narrative for regular grant):</p> <p><i>TERI has built an unparalleled reputation during more than three decades as a national leader providing innovative care and supportive services to children and adults with autism and developmental disabilities and their families. Our mission is to change the way the world sees and empowers individuals with autism &amp; developmental disabilities, and their families.</i></p> <p><i>As part of this mission, TERI has launched a robust agriculture program, providing vocational opportunities to people with developmental disabilities, a way to improve health for our students, and a means to financially sustain the program. Within this program is our Microgreens Social Enterprise, where we grow organic young greens for sale to local restaurants in the North San Diego area (see the attached TERI Microgreens Catalog). To expand our enterprise to up to four new restaurant customers in San Marcos (based on average orders), we are requesting \$1,500 from the San Marcos Community Foundation.</i></p> <p><i>The movement to organic foods at a reasonable cost, sourced locally is ideally suited to our agrarian community with its focus on health and wellness. Current literature describes Urban Farming benefits as resulting in optimized health, reduced risk of diet-related chronic diseases, and increased enjoyment of food among community members and those that are farming. Most importantly for TERI's students, education and vocational training in gardening and farming prepare students with autism and other developmental disabilities to launch agri-businesses/social enterprises, contributing to the local organic marketplace.</i></p> <p><i>Our Microgreens Social Enterprise has grown from selling to five restaurants to thirteen, and are expanding monthly. Over 30 adult students help throughout the growing, harvesting, packaging, and delivering process. Funding from the San Marcos Community Foundation will help TERI expand our social enterprise and customer base to four new buyers, creating more opportunities for our students during the production and delivery process, as well as interact with more businesses and community members in San Marcos. The budget is based on the average amount of product sold to our current customers per month-9 ounces each, multiplied by the average price per pound of organic microgreen seed over 12 months for four new customers.</i></p>		

Briefly describe the significance of your request to the San Marcos community:

*The movement toward sustainable, integrated communities builds a collective vision for the future paying special attention to environmental, economic, and social goals. This vocational enterprise provides rich opportunities for student farmers to integrate with their community, placing a focus on abilities rather than disabilities. Expanding our microgreens program further into the San Marcos community will allow it to become more socially aware, supportive of people with developmental disabilities, and a community known for its businesses being socially conscious- a major draw in our society today for prospective homebuyers, consumers, and entrepreneurs.*

Please attach the following items.

**Both Mini-Grant & Regular:**

1. Budget for request (use SMCF Budget Worksheet)
2. Annual Operating budget for the organization or unit
3. Federal & State Tax ID numbers
4. Board of Directors listing with affiliations

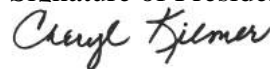
**5. Regular Grants Only:**

- a. 1-2 page narrative
- b. First 2 pages of Federal 990
- c. Most recent year-end Statement or Audit including any management letters associated with Audit.
- d. Signature of President or Authorized Officer on Application
- e. Optional: letters of support

Expected date project will begin/end:

Date by which funds will be expended:

Signature of President or Authorized Officer



10/5/2016

Name, Title

Date

Cheryl Kilmer, CEO & Founder of TERI

Submit Via Mail, In Person or Via Email to:

San Marcos Community Foundation

c/o City of San Marcos

1 Civic Center Drive

San Marcos, CA 92069

Email (PDF Format): [mgordon@san-marcos.net](mailto:mgordon@san-marcos.net)

**SAN MARCOS COMMUNITY FOUNDATION**  
**Budget Worksheet**

Provide an itemized list of expenses for this project:

(example – 72 bicycle helmets at \$7.80 each including tax = \$561.60)

*2.25lbs Organic Microgreens Seeds (average month of seed for up to 4 restaurants) at \$58.86*

*(average price of seed per pound-see attached list of seed prices) x 12 months=     \$ 1,589.22*

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

**Total budget for this PROJECT:**

**\$ 1,589.22**

**Grant Request Amount:**

*(Mini-grants not to exceed \$1,500, Regular grants not to exceed \$10,000.)*

**\$ 1,500**

Is this a challenge grant? *NO*

Could it be?

**Please list any other funding sources for this project.**

**\*\*Indicate if funds are committed (C), conditional (CD), or pending (P).**

\$ _____ (Name of source) _____	** _____
\$ _____ (Name of source) _____	** _____
\$ _____ (Name of source) _____	** _____
\$ _____ (Name of source) _____	** _____

## Micro Greens Comparison Charts



### HERBS — Slow-Growing Micro Green Varieties (16-25 days)

Part #	Variety	Description	1 Oz.	1/4 Lb. @/Lb.	1 Lb.	5 Lbs. @/Lb.	25 Lbs. @/Lb.
904M	<b>NEW</b> Anise	Bright green, round, toothed leaves, mild licorice flavor.	\$5.95	\$12.95	\$31.55	\$27.95	\$23.95
3123M	<b>NEW</b> Anise Hyssop	Light green and pink tinged leaves, licorice-mint flavor.	\$13.95	\$39.95	\$135.00	\$127.95	\$114.95
902M	Basil, Dark Opal	Purple and green leaves, sweet spicy flavor.	\$11.35	\$26.95	\$86.40	\$79.03	\$75.65
944M	Basil, Italian Large Leaf	Shiny green leaves, sweet spicy flavor.	\$4.75	\$6.95	\$21.95	\$20.95	\$18.95
774M	Basil, Lemon	Shiny green leaves, spicy lemon flavor.	\$6.60	\$14.05	\$45.25	\$36.25	\$32.60
3653MX	Basil, Purple Delight	Ruffled leaves, mostly purple plants. Sweet spicy flavor.	\$15.65	\$37.95	\$132.00	\$125.00	\$120.00
924M	Basil, Red Rubin	All purple leaves, sweet spicy flavor.	\$9.95	\$24.95	\$89.95	\$77.25	\$58.25
924MG OG	Basil, Red Rubin	All purple leaves, sweet spicy flavor.	\$13.20	\$29.95	\$97.90	\$93.33	\$85.86
2441M	Chervil	Intricate green leaves, anise flavor.	\$5.25	\$6.95	\$19.50	\$16.75	\$14.75
919M	Cilantro	Intricate green leaves, cilantro flavor.	\$4.50	\$6.90	\$12.95	\$12.00	\$8.95
922M	Cutting Celery	Finely-textured green leaves, mild celery flavor.	\$7.45	\$16.25	\$50.35	\$44.50	\$33.27
920M	Dill	Feathery leaves, mild dill flavor.	\$4.95	\$6.95	\$17.45	\$15.48	\$12.92
784MG OG	Fennel, Bronze	Feathery bronze leaves, mild fennel flavor.	\$16.95	\$42.15	\$144.15	\$136.00	\$122.45
3152M	Fennel, Green	Finely textured light green leaves. Great fennel flavor.	\$4.95	\$5.95	\$17.45	\$15.48	\$12.92
766M	Lemon Balm	Tiny, shiny green leaves, distinct lemon flavor.	\$14.50	\$38.50	\$120.60	\$104.50	\$93.34
6023M	<b>NEW</b> Marigold, Gem	Intricate leaves, spicy flavor.	\$23.50	\$90.60	\$340.00	\$310.50	—
2390M	Parsley	Intricately lobed leaves with mild parsley flavor.	\$4.80	\$8.30	\$21.50	\$19.01	\$16.89
839M	Salad Burnet	Intricate leaves, mild cucumber flavor.	\$7.80	\$19.05	\$64.40	\$56.43	\$53.44
2677M	Saltwort	Thread-like succulent leaves, mild earthy flavor.	\$12.85	\$30.05	\$108.30	\$89.81	\$76.25
2943M	Shiso, Britton	Purple ruffled leaves, mild licorice flavor.	\$14.65	\$35.00	\$122.70	\$115.20	\$109.40
383M	Sorrel	Lemon flavored.	\$7.00	\$15.40	\$47.55	\$42.97	\$39.78
2827M	Sorrel, Red Veined	Red-veined, lemon-flavored leaves.	\$22.50	\$57.05	\$193.05	\$172.00	\$164.08

### VEGETABLES — Slow-Growing Micro Green Varieties (16-25 days)

Part #	Variety	Description	1 Oz.	1/4 Lb. @/Lb.	1 Lb.	5 Lbs. @/Lb.	25 Lbs. @/Lb.
2247M	Amaranth, Garnet Red	Fuschia-colored leaves and stems, mild earthy flavor.	\$5.95	\$10.35	\$29.25	\$26.06	\$23.96
2247MG OG	Amaranth, Garnet Red	Fuschia-colored leaves and stems, mild earthy flavor.	\$5.95	\$10.35	\$29.25	\$26.06	\$23.96
2891MG OG	Arugula	Nutty, spicy flavor.	\$5.90	\$11.50	\$34.35	\$30.92	\$28.50
385M	Arugula	Nutty, spicy flavor.	\$5.05	\$8.10	\$23.10	\$20.39	\$18.56
2912MG OG	Beet, Bull's Blood	Lofty, red leaves, red stems, earthy flavor.	\$7.30	\$17.00	\$55.85	\$49.45	\$46.35
2912M	Beet, Bull's Blood	Lofty, red leaves, red stems, earthy flavor.	\$6.95	\$9.95	\$21.95	\$19.98	\$17.85
123M	Beet, Early Wonder Tall Top	Lofty, bright green leaves, red stems, earthy flavor.	\$4.40	\$5.35	\$11.35	\$10.05	\$9.39
3115M	Beet, Rubens	Lofty, red leaves and stems, earthy flavor.	\$3.50	\$9.55	\$20.55	\$19.59	\$17.50
2965M	Beet, Yellow	Lofty, bright green leaves, yellow stems, earthy flavor.	\$4.40	\$7.05	\$19.45	\$16.53	\$14.68
2468M	Carrot	Feathery leaves, mild carrot flavor.	\$4.50	\$7.20	\$19.85	\$16.86	\$14.97
703DM	Chard, Bright Lights	Lofty, red, yellow, pink, white stems, earthy flavor.	\$14.50	\$34.45	\$101.40	\$91.14	\$88.00
702MG OG	Chard, Ruby Red	Lofty, bright green leaves, red stems, earthy flavor.	\$6.75	\$14.95	\$36.95	\$32.76	\$31.20
702M	Chard, Ruby Red	Lofty, bright green leaves, red stems, earthy flavor.	\$4.95	\$6.95	\$14.95	\$12.39	\$11.80
337M	Komatsuna O.P.	Round green leaves, mild flavor.	\$6.50	\$12.65	\$39.95	\$35.55	\$32.45
2778MG OG	Magenta Spreen	Bright green leaves with hint of pink, early flavor.	\$15.75	\$39.70	\$132.30	\$120.37	\$115.08
378M	Mustard, Red Giant	Green leaves, red veins, spicy flavor.	\$7.55	\$15.95	\$51.40	\$46.47	\$43.02
2884MG OG	Mustard, Red Giant	Green leaves, red veins, spicy flavor.	\$7.00	\$15.40	\$47.55	\$42.97	\$39.78
3999MG OG	Orach, Ruby Red	Lofty, purple-red leaves and stems, earthy flavor.	\$17.30	\$42.35	\$136.50	\$125.83	\$113.25
3168M	Pac Choi, Red Pac	Dark red pac choi for micro greens.	\$8.75	\$22.60	\$71.70	\$68.39	\$62.93
2257M	Purslane, Red Gruner	Succulent leaves, white-pink stems, earthy flavor.	\$7.00	\$15.40	\$47.55	\$42.97	\$39.78
502M	Scallion, Evergreen Hardy White	Green thread-like leaves, onion flavor.	\$6.65	\$14.75	\$36.95	\$36.40	\$35.52
514M	Shungiku	Toothed leaves, mild flavor.	\$6.25	\$12.10	\$36.10	\$31.04	\$28.59



## VEGETABLES — Fast-Growing Micro Green Varieties (10-15 days)

Part #	Variety	Description	1 Oz.	1/4 Lb.	1 Lb.	5 Lbs. @/Lb.	25 Lbs. @/Lb.
2230M	<u>Cabbage, Red</u>	Dark green purple veined leaves, mild cabbage flavor.	\$6.25	\$12.40	\$39.95	\$35.65	\$32.45
2230MG OG	<u>Cabbage, Red</u>	Dark green purple veined leaves, mild cabbage flavor.	\$6.25	\$12.40	\$39.95	\$35.65	\$32.45
2942M	<u>Chinese Cabbage, Kogane</u>	Bright green leaves, mild sweet flavor.	\$5.95	\$10.15	\$28.70	\$26.00	\$23.95
366M	<u>Collard, Champion</u>	Mild kale flavor.	\$5.50	\$8.00	\$15.80	\$14.38	\$12.85
382M	<u>Cress, Cressida</u>	Fancy, three-lobed leaves, peppery flavor.	\$5.50	\$8.70	\$24.85	\$21.62	\$18.39
382MG OG	<u>Cress, Cressida</u>	Fancy, three-lobed leaves, peppery flavor.	\$5.95	\$9.65	\$27.55	\$23.97	\$20.39
2779MG OG	<u>Cress, Persian</u>	Strap leaves with small teeth, peppery flavor.	\$8.50	\$19.80	\$63.40	\$55.16	\$46.92
138M	<u>Hon Tsai Tai</u>	Green leaves, purple stems, mild radish flavor.	\$8.60	\$20.75	\$66.90	\$61.68	\$57.20
363M	<u>Kale, Red Russian</u>	Dark green, purple outlined leaves, mild kale flavor.	\$5.35	\$8.95	\$23.35	\$20.29	\$18.33
363MG OG	<u>Kale, Red Russian</u>	Dark green, purple outlined leaves, mild kale flavor.	\$6.50	\$12.70	\$40.30	\$36.93	\$33.94
2123M	<u>Kale, Toscano</u>	Waxy blue-green leaves, mild kale flavor.	\$8.75	\$12.90	\$40.80	\$37.08	\$30.90
2237M	<u>Kohlrabi, Purple</u>	Dark green leaves, purple stems, mild cabbage flavor.	\$5.15	\$9.10	\$23.80	\$20.50	\$18.65
2883MG OG	<u>Mizuna</u>	Toothed leaves, white stems, mild flavor.	\$6.15	\$11.85	\$35.40	\$32.60	\$30.25
2840M	<u>Mizuna, Dark Purple</u>	Toothed leaves, white-purple stems, mild mustard flavor.	\$10.80	\$25.05	\$84.35	\$77.78	\$72.12
2797M	<u>Mustard, Garnet Giant</u>	Darkest purple mustard, spicy flavor.	\$6.95	\$15.65	\$50.40	\$45.56	\$42.18
2738M	<u>Mustard, Golden Frills</u>	Bright green, intricately serrated leaves, spicy flavor.	\$8.80	\$21.15	\$67.65	\$61.17	\$56.64
2510M	<u>Mustard, Red Rain</u>	Red leaved, mild mustard flavor.	\$10.80	\$25.05	\$84.35	\$77.78	\$72.12
2740M	<u>Mustard, Ruby Streaks</u>	Serrated green and maroon leaves, sweet-spicy flavor.	\$8.80	\$21.15	\$69.00	\$62.39	\$57.77
2530M	<u>Mustard, Scarlet Frills</u>	Serrated green-red leaves, very spicy flavor.	\$9.30	\$21.80	\$70.40	\$63.64	\$58.93
377MX	<u>Mustard, Southern Giant Curled</u>	Heavily curled leaves, sharp spicy flavor.	\$5.15	\$8.75	\$22.65	\$19.65	\$17.80
2458M	<u>Mustard, Suehlihung No. 2</u>	Serrated leaves, sharp spicy flavor.	\$6.70	\$14.65	\$44.70	\$40.41	\$37.42
2736M	<u>Pac Choi, Red Choi</u>	Green-red splashed leaves, mild flavor.	\$8.75	\$22.15	\$70.30	\$67.05	\$61.70
3159M	<b>NEW</b> <u>Pac Choi, Rosie</u>	Round red leaves, mild flavor.	\$8.75	\$22.15	\$70.30	\$67.05	\$61.70
2155MG OG	<u>Radish, Daikon</u>	White stems, spicy flavor.	\$2.30	\$5.35	\$11.75	\$8.77	\$7.02
2155MX	<u>Radish, Daikon</u>	White stems, spicy flavor.	\$2.30	\$5.35	\$11.75	\$8.77	\$7.02
2461M	<u>Radish, Hong Vit</u>	Lofty, pink stems, mild radish flavor.	\$5.75	\$9.25	\$25.75	\$23.17	\$21.26
3111M	<u>Radish, Red Arrow</u>	Lofty, red stems, mild radish flavor.	\$5.15	\$10.70	\$22.90	\$19.10	\$17.90
2539M	<u>Radish, Red Rambo</u>	Lofty, purple and green leaves, mild radish flavor.	\$5.50	\$13.10	\$43.10	\$38.93	\$34.45
2539MG OG	<u>Radish, Red Rambo</u>	Lofty, purple and green leaves, mild radish flavor.	\$6.95	\$15.30	\$50.20	\$45.42	\$42.94
2897MG OG	<u>Tatsoi</u>	Spoon-shaped leaves, mild flavor.	\$6.15	\$11.85	\$35.40	\$32.60	\$30.25

### MICRO GREENS

**CULTURE:** Grow in a greenhouse or protected area. Since many different species can be grown for micro greens, we suggest that you follow the germination instructions for the specific variety being grown. However, success can generally be had by following these instructions for Brassica family members: Grow in shallow trays or 20-row flats. Broadcast seed thickly on the media surface with seeds 1/4"-1/2" apart, and cover lightly with sowing mix, vermiculite, etc. Ideally, soil temperature should be 75°F (24°C) until germination, then reduced to 60°F (16°C). Maintain air temperature around 60°F (16°C). Bottom water or mist to prevent sowing mix from splashing on the seedlings. Maintain even moisture and do not allow sowing medium to dry out. If fertilizing, incorporate fertilizer into the sowing mix before sowing, or use a bottom watering system for liquid applications to avoid residue on the leaves.

**HARVEST:** Once cotyledons have fully developed or once the first true leaves begin to emerge, depending upon your market. Typically micros range from 1/2" to 2" in height. For most items this will be 2-4 weeks after sowing, depending on the variety, growing conditions, and final product size desired. Cut with scissors or a sharp knife and minimize handling to reduce damage. Micro Greens must be washed before serving. Shelf life ranges from 5 to 10 days under proper storage conditions.

TERI INC  
2016 2017 Annual Budget  
BoardVersion

	<u>Total</u>
Revenues	
Residential	6,149,850.86
Day Programs	11,967,268.03
Fundraising/Donations	1,313,550.00
Other Income	548,645.79
Total Revenues	<u>19,979,314.68</u>
Expenses	
Administrative	778,342.00
Program Expenses	4,777,944.75
Wages	12,032,847.68
Benefits	2,260,486.70
Total Expenses	<u>19,849,621.13</u>
Revenues Over/(Under) Expenses	<u><u>129,693.55</u></u>



9661 6 0 DES

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
2 CUPANIA CIRCLE  
MONTEREY PARK, CA 91755-7406

DEPARTMENT OF THE TREASURY

Date: **SEP 06 1996**

T E R I INC  
3225 ROYMAR SUITE A  
OCEANSIDE, CA 92054-0000

Employer Identification Number:  
95-3532129  
Case Number:  
956176002  
Contact Person:  
HUGH RAMIREZ  
Contact Telephone Number:  
(213) 725-7002  
Our Letter Dated:  
September 1981  
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.

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).

You are required to file Form 990 only if your gross receipts each year are normally more than \$25,000. For guidance in determining whether your gross receipts are "normally" more than \$25,000, see the instructions for Form 990. 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.

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)

T E R I INC

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 "Steven A. Jeman". The signature is fluid and cursive, with a long horizontal stroke at the end.

District Director  
(Acting)

C1000431



August 21, 1980

In reply refer to  
344:RX:lb:g

T.E.R.I., Inc.  
c/o Cheryl Crouse and/or  
Phyllis McGrath  
5599 Coral Reef Ave.  
La Jolla, CA 92037

Purpose : Charitable  
Form of Organization : Corporation  
Accounting Period Ending: June 30  
Organization Number :

On the basis of the information submitted and provided your present operations continue unchanged or conform to those proposed in your application, you are exempt from state franchise or income tax under Section 23701d, Revenue and Taxation Code. Any change in operation, character or purpose of the organization must be reported immediately to this office so that we may determine the effect on your exempt status. Any change of name or address also must be reported.

You are required to file Form 199 (Exempt Organization Annual Information Return) or Form 199B (Exempt Organization Annual Information Statement) on or before the 15th day of the 5th month (4 1/2 months) after the close of your accounting period. See annual instructions with forms for requirements.

You are not required to file state franchise or income tax returns unless you have income subject to the unrelated business income tax under Section 23731 of the Code. In this event, you are required to file Form 109 (Exempt Organization Business Income Tax Return) by the 15th day of the 3rd month (2 1/2 months) after the close of your annual accounting period.

If the organization is incorporating, this approval will expire unless incorporation is completed with the Secretary of State within 60 days.

Exemption from federal income or other taxes and other state taxes requires separate applications.

Robert Lute, Manager  
Exempt Organization Section  
Telephone (800) 852-5711

cc: Secretary of State  
Registrar of Charitable Trusts

FTB 4206-ATS (7-78)


[Secretary of State Main Website](#)
[Business Programs](#)
[Notary & Authentications](#)
[Elections](#)
[Campaign & Lobbying](#)

## Business Entities (BE)

### Online Services

- [E-File Statements of Information for Corporations](#)
- [Business Search](#)
- [Processing Times](#)
- [Disclosure Search](#)

### Main Page

### Service Options

### Name Availability

### Forms, Samples & Fees

### Statements of Information

(annual/biennial reports)

### Filing Tips

### Information Requests

(certificates, copies & status reports)

### Service of Process

### FAQs

### Contact Information

### Resources

- [Business Resources](#)
- [Tax Information](#)
- [Starting A Business](#)

### Customer Alerts

- [Business Identity Theft](#)
- [Misleading Business Solicitations](#)

## Business Entity Detail

Data is updated to the California Business Search on Wednesday and Saturday mornings. Results reflect work processed through Tuesday, October 04, 2016. Please refer to [Processing Times](#) for the received dates of filings currently being processed. The data provided is not a complete or certified record of an entity.

<b>Entity Name:</b>	T.E.R.I., INC.
<b>Entity Number:</b>	C1000431
<b>Date Filed:</b>	08/21/1980
<b>Status:</b>	ACTIVE
<b>Jurisdiction:</b>	CALIFORNIA
<b>Entity Address:</b>	251 AIRPORT ROAD
<b>Entity City, State, Zip:</b>	OCEANSIDE CA 92058
<b>Agent for Service of Process:</b>	CHERYL KILMER
<b>Agent Address:</b>	251 AIRPORT ROAD
<b>Agent City, State, Zip:</b>	OCEANSIDE CA 92058

\* Indicates the information is not contained in the California Secretary of State's database.

- If the status of the corporation is "Surrender," the agent for service of process is automatically revoked. Please refer to California Corporations Code [section 2114](#) for information relating to service upon corporations that have surrendered.
- For information on checking or reserving a name, refer to [Name Availability](#).
- For information on ordering certificates, copies of documents and/or status reports or to request a more extensive search, refer to [Information Requests](#).
- For help with searching an entity name, refer to [Search Tips](#).
- For descriptions of the various fields and status types, refer to [Field Descriptions and Status Definitions](#).

[Modify Search](#)
[New Search](#)
[Printer Friendly](#)
[Back to Search Results](#)

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## Board of Directors

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### **President**

Cheryl Kilmer

Chief Executive Officer & Founder of TERI, Inc.

### **Vice President**

William Mara

Chief Operating Officer of TERI, Inc.

### **Treasurer**

Judy Remele

Educator

### **Board Member**

Laura White

Philanthropy Professional

### **Board Member**

Coni Cassiero

Family Member of Individual  
With Developmental Disabilities



# TERI Organic Farms Microgreens



A Social Enterprise of

**TERi** 

TRAINING • EDUCATION  
RESEARCH • INNOVATION

# About TERI



Since 1980, TERI has been changing the way the world views and cares for children, adults, and seniors with autism and other developmental and learning disabilities. With our 17+ programs and services, we work tirelessly to restore hope, provide solutions and empower our students and their families for a happy, fulfilling life.

As part of this mission, we have created social enterprises like TERI Organic Farms that allow our adult students to learn vocational skills and financially sustain our non-profit programs. Students who work in the Microgreens Program assist with planting, watering, harvesting, packaging, and delivering the product.

By purchasing organic microgreens from TERI, you are receiving a high-quality product while positively transforming the lives of people with special needs and your community.

*Learn more at [www.teriinc.org](http://www.teriinc.org)*







**36**  
years of  
changing lives

**600+**  
lives impacted  
monthly

**17+**  
innovative programs  
& services

**200+**  
dedicated  
volunteers

**150+**  
community  
partners



# Our Microgreens

Microgreens are tiny, young plants packed with nutrition that stylishly add flavor and vivid color to any dish. We grow our microgreens at our certified organic urban farm in Vista, CA with the help of our vocational students with special needs from TERI.



---

## Experience the TERI Organic Farms Difference

Certified Organic • Seeded & Grown to Order • Farm-to-Kitchen Delivery  
Competitive Prices • Helps Your Community



### Mild Micro Mix

Contains Mizuna, Cabbage, Kale, Kohlrabi. \*Varieties DOA  
4 oz • \$11



### Arugula

Spicy arugula flavor, purple stems and dark green leaves.  
4 oz • \$11



### Dark Opal Basil

Mostly purple leaves with green tinge, sweet-spicy flavor.  
3 oz • \$11



### Italian Basil

Shiny green leaves, sweet-spicy flavor. Excellent for adding flavor in a visually appealing way!  
3 oz • \$11



### Britton Shiso

Garnish desserts for a unique colors and subtle licorice flavor, or balance heat in spicy dishes.  
4 oz • \$11



### Purple/Red Cabbage

Mild flavor, dark green leaves with purple margins.  
4 oz • \$11



**Red Russian Kale**

Mild kale flavor, dark green, purple outlined leaves.

4 oz • \$11



**Tosceno Kale**

Mild kale flavor, waxy blue-green leaves.

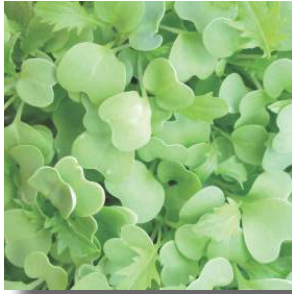
4 oz • \$11



**Purple Kohlrabi**

Mild cabbage flavor, dark green leaves, purple stems.

4 oz • \$11



**Mizuna**

Mild flavor, fancy toothed leaves, white stems.

4 oz • \$11



**Red Giant Mustard**

Spicy flavor, green leaves, red veins.

4 oz • \$11



**Ruby Streaks Mustard**

Sweet-spicy flavor, serrated green-maroon leaves.

4 oz • \$11



**Scarlet Frills Mustard**

Very spicy flavor, serrated green-red leaves.

4 oz • \$11



**Garnet Giant Mustard**

Mildly spicy flavor, purple-splashed leaves with slightly toothed margins.

4 oz • \$11



**Red Rambo Radish**

Mildly spicy, not harsh flavor, dark purple-green leaves with red stems.

4 oz • \$11



**Red Pak Choi**

Mild flavor, dark green leaves with maroon veins.

4 oz • \$11



**Daikon Radish**

Crisp, spicy flavor, green leaves and white stems.

4 oz • \$11



**Red Arrow Radish**

Spicy radish flavor, uniform, medium-green leaves with red stems.

4 oz • \$11



# Ordering & Delivery

## We grow for each restaurant...

We seed and grow the varieties you choose, giving you the advantage of product grown specifically for your restaurant and not just what's left on the market shelf!

Time from your first order to supply/delivery is approximately 2 weeks.

---

## Place Your Order:

### *By Email*

Send your completed Order & Billing Info Form:  
[andrewk@teriinc.org](mailto:andrewk@teriinc.org)

### *By Phone*

Call Andrew to place your order and give billing information:  
858.356.8149

Auto-Payment by credit card, bank/direct deposit available.  
Payment by cash or check at delivery also accepted.

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## Farm-to-Kitchen Delivery

Once you place your first order and set the schedule, we will deliver to your restaurant without the hassle of re-ordering each time!

Many deliveries are done by your farmers with special needs.

Be sure to say "hello", they love meeting our customers!

- Delivery on Mondays & Thursdays
- Weekly or Bi-Weekly





## Contact

### **Andrew Keener**

Organic Farmer/Microgreens Coordinator  
andrewk@teriinc.org • 858.356.8149




With 7 years' experience in the agriculture field and an industrious spirit, Andrew has helped TERI grow the Microgreens Enterprise for 2 years! Contact Andrew with questions or to visit TERI Organic Farms in Vista.





**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**

(Choose one) ☒ **MINI-GRANT** (Choose one) ☐ **REGULAR GRANT**

<b>Project Name:</b> SMHS Grad Nite 2017 <b>Date Submitted:</b> October 19, 2016	<b>Total # of people served:</b> 716 <b>Total # of San Marcos residents served:</b> 558	<b>Amount Requested:</b> \$1,500.00
<b>Non-Profit Organization Name and Address, Website</b>  San Marcos High School PTO 1615 San Marcos Blvd, San Marcos, CA 92078 www.smhspto.com		<b>Contact Person – Name, Title &amp; Phone, email</b>  Jenny Orlando VP Fundraising, SMHS PTO jennyorlando@cox.net 760-468-7272
<b>Briefly describe your request for funds (to be expanded upon in narrative for regular grant):</b>  San Marcos High School Grad Nite 2017 will be held at Disneyland on Saturday, June 17 <sup>th</sup> . The cost of this event is approximately \$62,800.00, which includes 600 Disney tickets at \$92 each and 10 busses at \$730 each. The cost of the event is split among each student that attends. Student ticket prices are approximately \$100 each. SMHS PTO will be providing some partial pay scholarships for need-based students, as identified by counselors.		
<b>Briefly describe the significance of your request to the San Marcos community:</b>  Students will depart SMHS on Saturday, June 17 <sup>th</sup> at 11:00 am and depart Disneyland on June 18 <sup>th</sup> at 2:00 am. This provides an opportunity to the graduating students to attend a safe and sober all-Knight party with their 2017 classmates. Any grant funds that are secured will lower the cost for each student. For many SMHS students, the lower the cost of the ticket, the more opportunity to attend.		
<b>Please attach the following items.</b> <b>Both Mini-Grant &amp; Regular:</b> 1. Budget for request (use SMCF Budget Worksheet) 2. Annual Operating budget for the organization or unit 3. Federal & State Tax ID numbers 4. Board of Directors listing with affiliations <b>5. Regular Grants Only:</b> a. 1-2 page narrative b. First 2 pages of Federal 990 c. Most recent year-end Statement or Audit including any management letters associated with Audit. d. Signature of President or Authorized Officer on Application e. Optional: letters of support		<b>Expected date project will begin/end:</b> 6/17/17-6/18/17  <b>Date by which funds will be expended:</b> 6/17/17  <b>Signature of President or Authorized Officer</b>  <b>Name/Title</b> <u>Sherry Clout, Co-President</u> <b>Date</b> <u>10-19-16</u>  <b>Submit Via Mail, In Person or Via Email to:</b> San Marcos Community Foundation c/o City of San Marcos 1 Civic Center Drive San Marcos, CA 92069 Email (PDF Format): <a href="mailto:mgordon@san-marcos.net">mgordon@san-marcos.net</a>

**SAN MARCOS COMMUNITY FOUNDATION**  
**Budget Worksheet**

Provide an itemized list of expenses for this project:  
(example – 72 bicycle helmets at \$7.80 each including tax = \$561.60)

600 tickets at \$92 each	\$55,200
10 busses at \$730 each	\$7,300
Misc.	\$300
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$

**Total budget for this PROJECT:** **\$62,800**

**Grant Request Amount:** **\$1,500**  
(Mini-grants not to exceed \$1,500, Regular grants not to exceed \$10,000.)

Is this a challenge grant?      No                              Could it be?

**Please list any other funding sources for this project.**

**\*\*Indicate if funds are committed (C), conditional (CD), or pending (P).**

\$1,000	(Name of source)	City of Carlsbad	**	P
\$1,000	(Name of source)	SMHS PTO	**	P
\$1,000	(Name of source)	Rincon	**	P
\$	(Name of source)		**	

**SMHS PTO**  
**Profit/Loss Budget**  
7/1/2016 - 6/30/2017

	Actual 14/15	Budget 15/16	Actual 15/16	Budget 16/17
Ordinary Income/Expense				
Gala - expenses				
Auction Cost				
Supplies	-695			
Credit card costs	-199		-105	
Printing & Postage				
Decorations	-705		-1,161	
Food & Drink & venue	-7112		-2,000	
Casino	-1310			
Payments for Booster Baskets				
Payment for Sponsor a Grad Night			-285	
Payment to Booster Clubs	-1070			
Total Auction Cost	-11091		-3551	
Gala Income				
Dessert Rush	2170			
Ticket Sales	4815		1717	
Live auction	10735			
Fund an item/sponsor a grad	990			
Silent Auction	7155		4695	
Auction - Corporate Donations	0			
Total Income	25865		6412	
Total Auction	14774	20000	2861	15000
E-Scrip	205	200	109	100
Finals Survival Kits - income				
Fall				
Spring				
Total Finals Survival Kits Income	12320		17205	
Final Survivor Kit Cost				
Fall Cost	-3027		-3804	
Spring Cost	-3159		-3612	
Total Final Survivor Kit Cost	-6186		-7416	
Net Final Survivor Income	6134	6000	9789	7000
Grad Nite				
Grad Nite Expenses				
Entertainment	-562		-437	
Other - Printing, Signs etc	-108		-744	
Decorations				
Security	-100		-225	
Transportation	0			
Venue	-25840		-25,500	
Total Grad Nite Expenses	-26610		-26,906	
Grad Nite Income				
Ticket Sales	20893		21,621	
Grad Nite - Other (City of Carlsbad)/Rincon	1840		1980	
Total Grad Nite Income	22733		23,601	
Total Grad Nite Cost to PTO	-3877	-10000	-3305	-5000
PTO Income				
Corporate Donations - Its Academic, Alliance	5000	4000	3975	4000
Donations - Sponsorships, matching	2294	500	100	0
HCF	15205	13000	15112	13000
Parent Donations	179	100	0	0
Total PTO income	22499	17600	19187	17000
Total Income	39,735.00		28,555.00	34,100.00

**Expenses****Hospitality**

Back to School Night	-121		0	
Day With A Knight	-105		-58	
Freshman Orientation	-374		0	
Staff Appreciation Day	-1898		-2008	
Teachers Back to School Lunch	-955		0	
Teachers Back to School Lunch - Other (WASC)	-199		0	

<b>Total Hospitality</b>	<b>-3453</b>	<b>-4000</b>	<b>-2066</b>	<b>-4000</b>
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<b>Printing &amp; Postage</b>	<b>-234</b>	<b>-500</b>	<b>0</b>	<b>-500</b>
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**Program Support**

Edline	-6114	-6300	-6230	-6300
EdConnect	-3595	-7000		-7000
Scholarship	-1000	-1000	-1000	-1000
Knights of Roundtable/AP Ambassadors	-946	-1000	-744	-1600
Seminars: Cyber Education, Mental Health			-650	-1300
Yearbook Ad	-400	-250	-350	-350
Newsletter Printing	-565	-500	0	-500
Support Fund	-372	-500	-300	-500

<b>Total Program Support</b>	<b>-12992</b>	<b>-16,550</b>	<b>-9274</b>	<b>-18550</b>
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**PTO Expenses**

Bank Charges	-155	-350	-78	-350
Credit Card Fees	0		-60	0
professional fees, late tax fees, accountant	0		-50	0
Insurance	-635	-650	-635	-650
PTO email account	-155	-200	-207	-200
Supplies (name badges/cc machine/external hard drive)	-33	-300	-72	-300
PTO Expenses - computer	0	-500	-597	0

<b>Total PTO Expenses</b>	<b>-978</b>	<b>-2000</b>	<b>-1699</b>	<b>-1500</b>
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<b>Total Expenses</b>	<b>-17,423.00</b>	<b>-23,050.00</b>	<b>-13,039.00</b>	<b>-24,550.00</b>
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<b>Net Ordinary Income</b>	<b>22,312.00</b>	<b>15,516.00</b>	<b>9,550.00</b>	
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**Principal's Fund**

John Moffat - Cyber Education Seminar	-650			
Quill- 106 Ti-84 Calculators	-11,447			
SMHS - 40 Chromebook Laptops and locking cart	-19,637			
Primesports -LLF hats	-918			
Buddy's Allstars - Staff SMHS logoed shirts	-6001			
SMUSD - NW Corner Exterior of Cube Signage	-5206			
SMHS - 2 Knights & 1 Pedestal	-3602			

<b>Total Principal's Fund Expenses</b>		<b>-47461</b>	<b>-50,000</b>	
--	--	---------------	----------------	--



San Marcos High School  
PTO

EIN: 20-0258130

2016-2017 PTO Officers:

President – Michelle Evangelista and Sherry Clouet

Treasurer – Lisa Sanchez

VP Fundraising – Jenny Orlando

VP Grad Nite – Nanette Clippinger

Secretary – Dena Malasek



**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**

(Choose one) ☒ **MINI-GRANT**    (Choose one) ☐ **REGULAR GRANT**

<b>Project Name:</b> Mission Hills Link Crew <b>Date Submitted:</b> 11/2/16	<b>Total # of people served:</b> 150 <b>Total # of San Marcos residents served:</b> Over 800 (650 Freshman, 150 Link Leaders plus families)	<b>Amount Requested:</b> \$1500						
<b>Non-Profit Organization Name and Address, Website</b> Mission Hills High School Link Crew 1 Mission Hills Ct. San Marcos, CA 92069 <a href="http://www.smusd.org/Domain/1964">http://www.smusd.org/Domain/1964</a>	<b>Contact Person – Name, Title &amp; Phone, email</b> Krista Horrigan Teacher/Link Crew Coordinator w.760-290-2700 ext. 3375 c. 760-579-1819 <a href="mailto:Krista.Horrigan@smusd.org">Krista.Horrigan@smusd.org</a>							
<p><b><u>Briefly describe your request for funds (to be expanded upon in narrative for regular grant):</u></b></p> <p>Link Crew is a high school transition program that welcomes freshmen and makes them feel comfortable as they start their high school experience. Built on the belief that students can help students succeed, Link Crew is a proven high school transition program that trains juniors and seniors to be Link Crew Leaders. As positive role models, Link Crew Leaders are mentors and student leaders who guide freshmen to discover what it takes to be successful during the transition to high school and help facilitate freshmen success.</p> <p>Link leaders attend leadership conferences to help support them become better mentors and they coordinate social and academic follow-ups with freshman after August's Freshman Orientation. Leaders have volunteered at school to help parents at back-to-school night and they also volunteer around the community. One of the ways we like to show our pride, is by wearing brightly colored t-shirts representing Link Crew. We want freshman to see a Link leader in their shirt and know they can feel comfortable and safe approaching them for help. Students who have the desire to be a leader on campus are also the ones who are volunteering to make our community a better place.</p>								
<p><b><u>Briefly describe the significance of your request to the San Marcos community:</u></b></p> <p>The goal of Link Crew is to help "link" freshman to their school and show them that they have a place in high school. High School can be a scary place for hundreds of kids, and when a high school student is caught up in a gang-related death, or commits suicide, Link leaders talk about ways they can seek out kids who are hurting or feeling lost. Link Crew students are the ones who want to stand out as a leader, helper, mentor, and friend. Through funding support to purchase Link Crew shirts, more positivity will be spread through the community. We hope to help all kids transition more smoothly into high school, feel like Mission Hills is their home, and most importantly, let them know that someone cares about them.</p> <p>The San Marcos Community Foundation's grant will allow Link Crew to focus freshman follow ups on social and academic meetings since the majority of our budget goes towards buying t-shirts. 90% of Mission Hills students qualify for free and reduced lunches; most students are unable to purchase a shirt. By providing them with a shirt, they are able to unite with other leaders and form bonds which help build the program and in return, makes our community stronger.</p>								
<p><b>Expected date project will begin/end:</b>                      begin: 12/1/16 end: 5/1/16</p> <p><b>Date by which funds will be expended:</b> 5/1/16</p>								
<p><b>Signature of President or Authorized Officer</b></p> <table style="width: 100%;"><tr><td style="width: 60%;">Krista Horrigan, Coordinator</td><td style="width: 40%;">11/2/16</td></tr><tr><td>_____</td><td>_____</td></tr><tr><td><b>Name, Title</b></td><td><b>Date</b></td></tr></table>			Krista Horrigan, Coordinator	11/2/16	_____	_____	<b>Name, Title</b>	<b>Date</b>
Krista Horrigan, Coordinator	11/2/16							
_____	_____							
<b>Name, Title</b>	<b>Date</b>							

SAN MARCOS COMMUNITY FOUNDATION

Budget Worksheet

Provide an itemized list of expenses for this project:

(example – 72 bicycle helmets at \$7.80 each including tax = \$561.60)

150 T-shirts at \$10 each including tax	\$ 1500
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$

Total budget for this PROJECT:

\$1500

Grant Request Amount:

(Mini-grants not to exceed \$1,500, Regular grants not to exceed \$10,000.)

\$1500

Is this a challenge grant?

Could it be?

Please list any other funding sources for this project.

\*\*Indicate if funds are committed (C), conditional (CD), or pending (P).

\$ (Name of source)	**
\$ (Name of source)	**
\$ (Name of source)	**
\$ (Name of source)	**

Mission Hills Link Crew Annual Operating  
Budget: \$3000

Federal & State Tax ID numbers 95-2939465  
For further questions regarding tax documentation,  
please contact [Jolene.Clark@smusd.org](mailto:Jolene.Clark@smusd.org), finance  
officer at Mission Hills High School

San Marcos Unified Governing Board of Directors:

Janet McClean

Jay Petrek

Pam Lindamood

Randy Walton

Stacy Carlson

Link Crew Statistics For over 19 years Link Crew has been making an impact at high schools across the nation; following are some examples of the many positive changes schools have experienced because of Link Crew.

Southwest High School, Green Bay, Wisconsin

- 38% reduction in freshman truancy
- 25% reduction in freshman who earned F's
- First semester freshman absences: the year before Link Crew, 144 after two years with Link Crew, 41

Yerington High School, Yerington, N Yerington High School, Yerington, Nevada

- 45% reduction in freshman teacher referrals after one year
- 50% reduction in freshman suspensions after one year
- 32% reduction in freshman failure after one year

David Douglas High School, Portland, Oregon

- 71% reduction in freshman disciplinary referrals
- 48% reduction in freshman absences

Dodgeland High School, Juneau, Wisconsin

- 13% reduction in freshman failure

Cathedral City High School, Cathedral City, California

- 58% reduction in freshman referrals

Apollo High School, Arizona

- 50% reduction in freshman truancy

Orono High School, Minnesota

- 45% reduction in freshman cigarette use
- 78% reduction in freshman male alcohol use

Henry Sibley High School, MN

- 50% reduction in freshmen failures

Atwater High School, CA

- 30% reduction in freshmen failures
- 15% reduction in freshmen absences within the first semester

Golden Valley High School, CA

- 72% Reduction in freshmen tardies
- 23% Reduction in freshmen fights

Rialto High School, Rialto, CA

In the first semester there was a...

- 75 % decrease in freshman absences
- 53% decrease in freshman suspensions

After one year there was a...

- 75% increase in freshman attendance

North Farmington High School, Farmington Hills, Michigan

- 38% reduction in freshman Saturday School detentions
- 30% reduction in unexcused freshman absences
- 24% reduction in overall freshman referrals
- 19% reduction in freshmen who earned Fs

North High School, North St. Paul, Minnesota

- 46% reduction in freshman failures
- 50% reduction in discipline referrals

Shawnee Mission East High School, Shawnee Mission, Kansas

- 96% reduction in discipline referrals

Foothill Technology High School, Ventura, California

- 12% increase in Renaissance

Academic Recognition Amphi High School, Tucson, Arizona

- 37% reduction in freshman failures

Lindbergh High School, St. Louis, MO

- 28% reduction in freshman D's and F's
- 18% reduction in freshman tardies

North High School, North St. Paul, Minnesota

- 46% reduction in freshman failures
- 50% reduction in discipline referrals • 78% freshmen surveyed:  
Link Crew made them feel more comfortable in high school

Washington High School, Washington, Missouri

- 50% reduction in freshman suspensions

Governor Livingston High School, Berkeley Heights, New Jersey

- 29% reduction in discipline referrals

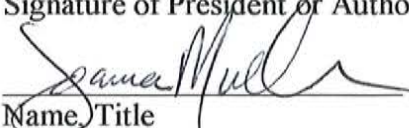
Gilroy High School, Gilroy, CA

- 73% reduction in freshman tardies
- 48% reduction in discipline referrals

**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**



(Choose one) ☐ MINI-GRANT (Choose one) ☒ REGULAR GRANT

Project Name: Team Training Date Submitted: September 23, 2016	Total # of people served: 53 Total # of San Marcos residents served: 1	Amount Requested: \$ 5,000
Non-Profit Organization Name and Address, Website Canine Companions for Independence Southwest 124 Rancho del Oro Drive Oceanside, CA 92057 cci.org		Contact Person – Name, Title & Phone, email Joanna Mueller Development Associate 760-901-4306 jmueller@cci.org
<p><u>Briefly</u> describe your request for funds (to be expanded upon in narrative for regular grant):</p> <p>Canine Companions for Independence is a non-profit organization that enhances the lives of people with disabilities by providing highly trained assistance dogs and ongoing support to ensure quality partnerships. We respectfully are seeking support to place one highly skilled dog with a resident from San Marcos who has applied for an assistance dog.</p>		
<p><u>Briefly</u> describe the significance of your request to the San Marcos community:</p> <p>People with disabilities find that their canine companion assists them in the ability to function more independently at home and when out in the community and serves as a bridge in social settings. Each team raises awareness in the community that people with disabilities can lead productive lives. Through awareness, the community learns tolerance and understanding.</p> <p>By pairing a Canine Companion to a San Marcos resident with disabilities, the San Marcos Community Foundation could profoundly change not only the life of the recipient, but also an entire community.</p>		
Please attach the following items. <b><u>Both Mini-Grant &amp; Regular:</u></b> 1. Budget for request (use SMCF Budget Worksheet) 2. Annual Operating budget for the organization or unit 3. Federal & State Tax ID numbers 4. Board of Directors listing with affiliations <b>5. Regular Grants Only:</b> a. 1-2 page narrative b. First 2 pages of Federal 990 c. Most recent year-end Statement or Audit including any management letters associated with Audit. d. Signature of President or Authorized Officer on Application e. Optional: letters of support		Expected date project will begin/end: 2017 Date by which funds will be expended: 11/15/2017  Signature of President or Authorized Officer  Name, Title Date Joanna Mueller, Development Associate 9/20/16  Submit Via Mail, In Person or Via Email to: San Marcos Community Foundation c/o City of San Marcos 1 Civic Center Drive San Marcos, CA 92069 Email (PDF Format): <a href="mailto:mgordon@san-marcos.net">mgordon@san-marcos.net</a>

**2016 Grant Proposal  
San Marcos Community Foundation**

Canine Companions for Independence respectfully requests your support to fund the cost of one graduate team from San Marcos for Team Training--a critical component in the process that prepares and provides persons with disabilities a skilled assistance dog. The two-week Team Training takes place at the Southwest Regional Campus in the neighboring community of Oceanside. Once a graduate completes the program, they will return to San Marcos and impact the entire community by living a fuller and more independent life. While our mission is to focus on the individuals with disabilities, the graduate team acts as an ambassador and helps build tolerance, understanding and acceptance within a community. Each time a team is out in public, there is an opportunity for teachable moments; to touch people, educate people both young and old and bring people together in a positive and impactful way. A community that supports all of their citizens through tolerance and understanding is healthier and more cohesive community and by supporting a graduate team from San Marcos is a visible reminder that taking care of its citizens makes communities better and stronger.

**About Canine Companions for Independence:** Canine Companions pioneered the concept of training dogs to assist adults and children living with physical and developmental disabilities. Founded in 1975, our work is driven by an important mission: *to enhance the lives of people with disabilities by providing highly trained assistance dogs and ongoing support to ensure quality partnerships.* Effective, quality services has earned Canine Companions its reputation as the leader and gold standard in the growing assistance dog industry. We are thrilled to be celebrating our 40<sup>th</sup> Year Anniversary.

The essence of Canine Companions' program involves:

- ❖ Breeding, raising and training assistance dogs.
- ❖ Strategically matching the dogs with qualified applicants during a two week training program.
- ❖ Providing long-term and life time support services to ensure success of every human-canine team.
- ❖ Providing each dog, free of charge, to the graduates.

**Need:** 11.9% of the civilian non-institutionalized population of the United States has been diagnosed with at least one disability. This includes 10% of adults from ages 18-64, and 4% of children under 18. (2010 US Census) Persons with developmental and physical disabilities often deal with limited mobility and social ostracism. Simple tasks that a non-disabled person may take for granted such as opening a door or picking up a dropped object, for example, can be impossible for some individuals with limited mobility. Moreover, people with disabilities are frequently left behind by a society that averts its eyes from those it finds different. Assistance dogs make an impactful difference in the well-being of children and adults with disabilities through their aptitude to aid with tasks of daily living and improving the emotional quality of the individual's life.

**Project purpose:** Funding from the San Marcos Community Foundation will enable Canine Companions to provide one highly trained assistance dog for one resident from San Marcos with disability free of charge, thereby making an immediate, tangible and dramatic impact in the quality of life on this population. The funds we seek will directly impact a resident of San Marcos, but one of our goals is to educate residents about the important role that service dogs play in the lives of an individual with a disability. A person who receives a dog from our program gains more confidence and lives a much more independent life. While in the community of San Marcos, the dog acts as an ice breaker to those who may have little to no direct contact with a person with a disability. Children who may feel uncomfortable seeing a person in a wheelchair is immediately put at ease by a service dog. Once that barrier is broken, the community at large is positively impacted the experience. There is a strong ripple effect from the canine human team that is felt throughout the entire community and each team acts as ambassadors to create a more cohesive and close knit community. Studies indicate that recipients of assistance dogs report that more people approached them (100%), their social interactions increased (87%), and that their number of friends expanded (59%) [Fairman & Huebner, 2001]. Overall, they describe a greater sense of belonging and they feel more socially accepted.

**Project:** A Graduate Sponsorship supports a student from San Marcos during an intensive two week period known as Team Training. During the two week program, students meet six days a week to learn about canine behavior and care, dog handling skills, and the commands that their future partners already know. Each class is led by Canine Companions professional instructors. The student and his or her family member(s) are taught how to work in partnership with their assistance dog through seminars, quizzes, hands-on instruction, and practice, both at the regional center and with frequent



field trips to locations such as shopping malls and restaurants. Staff members match each student with the assistance dog that best meets his or her needs, a skill that receives awed feedback from recipients who can't believe what an apt companion has joined their lives.

The Skilled Companion Graduate Sponsorship includes:

- Two weeks of thorough, professional instruction, monitoring and evaluation.
- Training manuals.
- Training equipment- leashes, collars, assistance dog vests etc.
- Field trips.
- Hands-on training with a dog.
- Private room and accessible bath for each student plus community kitchen and laundry facilities and meals at our Southwest Campus.
- 24-hour caretaker and security.
- "Going home" packet which includes grooming supplies, food bowls, toys and a limited food supply.
- Assistance Dogs International public access certification (upon successful completion of written and practical exams).

The students are administered written and practical tests to measure their level of knowledge and ability to be successful at home with their new assistance dog. In order to receive temporary home and public access with their canine companion, they must pass both tests. Six weeks after they have passed the Team Training, graduates return to the Canine Companions campus for their formal public access tests and certification using the standards of Assistance Dogs International. In total, students will learn the 40 + commands, experience 100+ classroom hours, 17 hours of lectures, 50 practice sessions, 10-12 hours on field trips, 25 hours outside the classroom for study and testing and 1.5 days of final evaluations.

**Intended results:** With the successful placement of an assistance dog with one person with a disability, Canine Companions intended results include:

- The team will gain enhanced self-confidence, loving companionship, hope, self-esteem and independence.
- The team will be able to take advantage of new opportunities that may not have been feasible prior to receiving an assistance dog.
- The team and family will gain an important new sense of responsibility in providing care and a safe, loving home for their dog.
- The team will make important new social connections with his/her peers and community that result in greater inclusion and disability awareness.
- General awareness of Canine Companions will grow, building a greater community understanding of assistance dogs and of the challenges faced by people with disabilities.

**Monitoring and Reporting Progress; Measuring Project Success:** Success will be determined by the following monitoring and evaluation tools, used at every stage of the process:

- ✓ Annual veterinary report.
- ✓ Thorough instruction, monitoring and evaluation throughout Team Training.
- ✓ Certification testing 45 days post-graduation and every one to three years thereafter.
- ✓ Regular reports, visits, workshops, phone calls and emails throughout the lifetime of the partnership to ensure ongoing success.

**Timeline:** This grant would provide a Canine Companions assistance dog for one person from San Marcos on Canine Companions' waiting list who has already passed through the extensive application and interview process. Following successful completion of Team Training, the new teams will graduate in a special public ceremony. The team will return to the Southwest Center 45 days later for public recertification testing and provide regular progress reports as required by Canine Companions. Home visits, workshops, seminars, special events, testing and reunions will be continually offered in addition to phone and email support to enable the team's long-term success. Each team that graduates will remain together between eight to ten years. Imagine the impact this team will have on the countless people they will touch in San Marcos over time. The ripple effects are endless.

**SAN MARCOS COMMUNITY FOUNDATION**  
**Budget Worksheet**

Provide an itemized list of expenses for this project:  
 (example – 72 bicycle helmets at \$7.80 each including tax = \$561.60)

<b>PROGRAM SERVICES</b>	<b>COSTS</b>
Breeding & Puppy Raising	\$ 84,000
Advanced Training	\$240,000
Graduate Follow-up Services	\$120,000
Veterinary	\$ 60,000
<b>Total Program Services</b>	<b>\$504,000</b>
<b>SUPPORT SERVICES</b>	
Outreach and Fund Development	\$77,000
General Administration	\$19,000
<b>Total Support Services</b>	<b>\$96,000</b>
<b>TOTAL SERVICES EXPENSES</b>	<b>\$600,000</b>

**Total budget for this PROJECT:** **\$ 600,000**

**Grant Request Amount:** **\$ 5,000**

*(Mini-grants not to exceed \$1,500, Regular grants not to exceed \$10,000.)*

Is this a challenge grant? NO Could it be?

**Please list any other funding sources for this project.**

**\*\*Indicate if funds are committed (C), conditional (CD), or pending (P).**

\$ 50,000	Harriet E Pfleger Foundation (C)
\$ 50,000	Sulentic Family Foundation (C)
\$ 50,000	Linden Root Dickenseon Foundation (P)
\$ 50,000	Sharon Lund Foundation (P)
\$ 15,000	Boeing Global Corporate Citizenship
\$ 10,000	Pacific Life Foundation
\$ 3,000	Henry Bull Foundation (C)
\$ 5,000	William Gillespie Foundation (C)
\$ 10,000	David Copley Foundation (C)
\$ 5,000	El Cajon Lions Club (C)
\$ 1,000	WD (Western Digital) Foundation (C)
\$ 1,000	The Gold Diggers (C)



**Canine Companions for Independence®**  
**Southwest Regional Center**  
**2016 Operating Budget**

Major Gifts/Solicited Individuals	\$	2,210,200
Special Events	\$	610,000
Foundation Grants	\$	575,000
Business/Corporate Gifts	\$	278,000
Direct Marketing (online/mail)	\$	558,200
United Way/Organizations/Clubs	\$	165,900
Fees/Proceeds	\$	375,000
		<hr/>
		4,197,600

Advertising	\$	1,650
Dues/Subscriptions	\$	3,850
Personnel	\$	2,048,420
Equipment	\$	40,700
Insurance	\$	21,670
Occupancy	\$	194,700
Postage & Shipping	\$	95,590
Professional Fees	\$	364,320
Marketing	\$	23,320
Supplies	\$	132,000
Taxes and Fees	\$	2,750
Data/Voice Communications	\$	36,000
Travel & Meeting Expenses	\$	176,000
National Support Services	\$	1,056,330
		<hr/>
<i>Total Operating Expenses</i>		4,197,600



**Canine Companions for Independence  
2016 Southwest Regional Board**

<i>Abramowitz, Paul</i> Investor Encino, California	<i>Hollenstein, Tommy</i> Artist, Canine Companions Graduate Canoga Park, California
<i>Bauce, Bill</i> Philanthropist Rancho Santa Fe, California	<i>Peluso, Jack</i> Financial Advisor San Diego, California
<i>Cartin, Robert, DVM</i> Business Owner Oceanside, California	<i>Small, Stephanie, LLC</i> Business Owner Phoenix, AZ
<i>Conlin, Col. Christopher C., USMC (Ret.)</i> Business Professional San Diego, California	<i>Street, Bob</i> National Board Member Business Owner/Civic Leader Colorado Springs, CO
<i>Gackstetter, Tim</i> Program Manager/Engineer Canine Companion Graduate San Diego, California	<i>Thiederman, Sondra, PhD., Vice President</i> Business Owner San Diego, CA
<i>Gregos, Glen</i> Retired Banker Canine Companions Graduate Woodland Hills, CA	<i>Ward, Mark</i> Customer Programs Policy Advisor, Utilities Industry Poway, California
<i>Haydel, Kim, President</i> Western Zone, Canon Business Solutions, Canine Companions Graduate Gardena, California	<i>Weir, Lance, USMC Reserve Veteran</i> Canine Companions Graduate Carlsbad, California
<i>Hennessy, Leslie</i> National Board Member Business Executive, Industry Council Colorado Springs, Colorado	<i>Wilson, Margaret</i> Retired Occupational Therapist Coronado, California

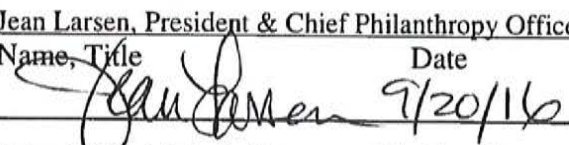
*It is Canine Companions' policy not to disclose individual board member addresses or telephone numbers.*

*If you would like to contact a board member, we would be happy to facilitate the communication. Our board meets four times a year.*



**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**

(Choose one) ☐ MINI-GRANT (Choose one) ☒ REGULAR GRANT

Project Name: Forensic Health Services Date Submitted: 9/21/2016		Total # of people served: 446 Total # of San Marcos residents served: 58 during 2015	Amount Requested: \$4,050
Non-Profit Organization Name and Address, Website Palomar Health Foundation 960 Canterbury Place, Suite 200 Escondido, CA 92025 www.palomarhealthfoundation.org		Contact Person – Name, Title & Phone, email Jaqueline Aranda Grant Manager (760) 739-2198 jaqueline.aranda@pph.org	
Briefly describe your request for funds (to be expanded upon in narrative for regular grant):  Forensic Health Services (FHS) works closely with investigative and prosecutorial agencies to provide state-of-the-art forensic evidence so that victims may pursue justice against their aggressors. Palomar Health Foundation would like to submit a grant request on behalf of FHS to fund the training of FHS staff to become facilitators and educate the community on: preventing, identifying, and reporting child abuse.			
Briefly describe the significance of your request to the San Marcos community:  Annually, approximately 60 adults, elderly adults, and children from the San Marcos community are brought through the Forensic Health Services facility doors in need of services. About 1 in 10 people that receive services from our facility are residents of San Marcos. Support from the San Marcos Community Foundation will allow Forensic Health Services to expand its scope of services to include prevention and community education.			
Please attach the following items. <b>Both Mini-Grant &amp; Regular:</b> <ol style="list-style-type: none"> <li>Budget for request (use SMCF Budget Worksheet)</li> <li>Annual Operating budget for the organization or unit</li> <li>Federal &amp; State Tax ID numbers</li> <li>Board of Directors listing with affiliations</li> </ol> <b>5. Regular Grants Only:</b> <ol style="list-style-type: none"> <li>1-2 page narrative</li> <li>First 2 pages of Federal 990</li> <li>Most recent year-end Statement or Audit including any management letters associated with Audit.</li> <li>Signature of President or Authorized Officer on Application</li> <li>Optional: letters of support</li> </ol>		Expected date project will begin/end: Feb. 2017 Date by which funds will be expended: July 2017  Signature of President or Authorized Officer  <u>Jean Larsen, President &amp; Chief Philanthropy Officer</u> Name, Title Date  Submit Via Mail, In Person or Via Email to: San Marcos Community Foundation c/o City of San Marcos 1 Civic Center Drive San Marcos, CA 92069 Email (PDF Format): <a href="mailto:mgordon@san-marcos.net">mgordon@san-marcos.net</a>	

**Program Mission**

Forensic Health Services (FHS) is based on a foundation of healing and justice, providing a professional, compassionate, and coordinated multi-disciplinary approach to the evaluation of abused children and adults, and their families.

**Program Background**

FHS consists of CAP and SART services. Palomar Health established the Child Abuse Program (CAP) in 1984 out of a growing national movement to improve child abuse investigations. Accredited by the National Children's Alliance, CAP is 1 of 54 such programs in the state of California and only 1 of 2 in San Diego County. In reaction to a local woman's sexual assault, a group of concerned nurses established the Sexual Assault Response Team (SART) in 1991 because forensic services were not available for adult victims in the entire county.

Since FHS's inception, more than 15,000 children, teens, adults, and elderly adults have received comprehensive services on their journeys to survivorship. Annually, FHS provides services and medico-legal evidence for approximately 300 children and 150 adults.

**Program Description**

Forensic Health Services provides crucial forensic services to victims of physical and sexual abuse. FHS' services are available 24 hours a day, seven days a week. Victims typically arrive to the facility accompanied by a police officer or sheriff's deputy. The FHS facility is centered on the victim's needs by providing: state-of-the-art evidence-gathering equipment and techniques, privacy, sensitivity, and a streamlined interview process by a multidisciplinary team of professionals that includes a forensic nurse examiner, detective, and victim advocate.

**Services Offered**

- Medical evaluations for sexual and physical abuse
- Post-mortem exams on an emergent basis
- Forensic examinations of suspects
- Videotaped interviews of children and developmentally delayed adults for: abuse, sexual assault, or witnesses to major crimes
- Referrals for follow-up treatment and counseling
- Trauma counseling
- Expert testimony in court
- Referrals to appropriate community resources

**Needs Addressed**

According to the San Diego County Health and Human Services Agency, approximately 70,000 cases of child abuse and neglect are reported annually in San Diego County. While advances in technology have made it possible to definitively prosecute more sexual predators, an overwhelming number of cases continue to be underreported. Programs like Forensic Health Services are necessary to the safety of a community; they keep aggressors off the streets and provide victims with the tools to cope following a traumatic episode. FHS

employs a unique model and techniques that decrease the amount of times a victim recounts their story, thereby limiting the amount of times they relive the experience. FHS is one of two centers in San Diego County offering forensic services for abused children. The center is also unique in that it is the only center in San Diego County that caters to both adult and child victims; other centers are age-specific.

Reporting physical and sexual abuse against children remains a constant challenge as the public is not educated enough on what constitutes as reportable abuse or what resources are available to victims. Members of the public oftentimes file a report or come forward once it is too late. There is also a lack of knowledge as to the proper procedure and channels to contact when witnessing cases of child abuse. Forensic Health Services will address these challenges by outreaching and educating the community on preventing abuse, recognizing the signs, and intervening on behalf of victims.

### **Program Impact**

Forensic Health Services has: increased the quality of child abuse investigations, improved concreteness of evidence presented, reduced the number of times a victim is questioned and re-traumatized, and ultimately prevented future violence by removing predators from the community. FHS representatives attend a monthly gathering of DA representatives, sheriff's offices, and local social workers to discuss sexual and physical abuse trends and cases that share similar characteristics. This gathering serves as a safeguard for victims to bring their attackers to justice.

Annually, FHS provides crucial forensic services for approximately 60 members from the San Marcos community.

### **Request**

Palomar Health Foundation would like to request a grant of \$4,050 from the San Marcos Community Foundation for the education of FHS staff to lead community-wide trainings on how to: prevent child sexual abuse, recognize signs of sexual abuse, react responsibly when receiving a disclosure, and how to intervene in grey areas when they see boundary violations.

The "Stewards of Children" Facilitator Workshop Training involves a 7.5 hour workshop conducted by an authorized facilitator who provides information on how to implement the "Stewards of Children" training instruction on the philosophy/purpose of the curriculum, mastery of the training curriculum, preparation for and promoting the training and facilitator policies/procedures. A minimum of 6 FHS staff members will receive training to become community facilitators.

Once staff members have received the aforementioned training, they will in turn host community trainings to educate members of the public and local organizations on the "Stewards of Children" training. Community trainings will be done in English and Spanish and will target parents, school district personnel, youth-serving organizations, and faith centers throughout North San Diego County, including San Marcos.

**SAN MARCOS COMMUNITY FOUNDATION**  
**Budget Worksheet**

Provide an itemized list of expenses for this project:

(example – 72 bicycle helmets at \$7.80 each including tax = \$561.60)

<u>9 FHS staff members receiving facilitator training at \$450 each</u>	\$ <u>4,050.00</u>
<u>2,000 community education workbooks at \$10 each</u>	\$ <u>20,000.00</u>
<u> </u>	\$ <u> </u>
<u> </u>	\$ <u> </u>
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<u> </u>	\$ <u> </u>
<u> </u>	\$ <u> </u>

**Total budget for this PROJECT:** **\$24,050.00**

**Grant Request Amount:** **\$ 4,050.00**  
(Mini-grants not to exceed \$1,500, Regular grants not to exceed \$10,000.)

Is this a challenge grant?      No                                      Could it be?

**Please list any other funding sources for this project.**

**\*\*Indicate if funds are committed (C), conditional (CD), or pending (P).**

\$ <u>10,000</u>	(Name of source) <u>Seth Sprague Charitable &amp; Educational Trust</u>	** <u>C</u>
\$ <u>\$3,066</u>	(Name of source) <u>Individual Donors (17)</u>	** <u>C</u>
\$ <u>10,000</u>	(Name of source) <u>McCarthy Family Foundation</u>	** <u>P</u>
\$ <u>5,000</u>	(Name of source) <u>Stewart J. Rahr Foundation</u>	** <u>P</u>



# San Diego County Sheriff's Department

Post Office Box 939062 • San Diego, California 92193-9062



*William D. Gore, Sheriff*

April 8, 2015

Kimberly Rideout Cardoso, MBA  
Director of Major Giving  
Palomar Forensic Health Services  
960 Canterbury Place, Suite 200  
Escondido, CA 92025

Dear Ms. Cardoso:

## LETTER OF SUPPORT FOR PALOMAR FORENSIC HEALTH SERVICES

Palomar Forensic Health Services serves the community with distinction by providing vital services to victims of sexual assault and child abuse as well as providing foster child health assessments. Our deputies accompany victims to the Forensic Health facilities where qualified forensic staff set about the important task of collecting evidence and conducting forensic interviews. The staff operates supportively and with compassion. Members of our Department are continually impressed by the professionalism at the facility.

In 2014, Palomar Forensic Health Services provided services to 912 adult and children from our communities. The Sheriff's Department brought 244 of those to the facility, which is the highest referral rate from a single law enforcement agency.

I am proud to support the forensic center and the important work that they perform. I know their work helps our investigators present the best scientific evidence possible to District Attorney Bonnie Dumanis' office so that her prosecutors can hold child molesters and sexual assault defendants accountable for their crimes.

Sincerely,

William D. Gore, Sheriff

WDG:JSD:np





## **Board of Directors FY2017**

**Thomas H. Silberg– Chair**

StemProtein  
Chief Executive Officer

**Kevin Harkenrider**

ViaSat  
Senior Vice President - Broadband Services

**Evangeline J. “Ginger” Larson– Vice Chair**

Larson & Solecki  
Attorney

**Harvey Hershkowitz**

Live Right Wellness Center  
Owner

**Craig S. Brown– Immediate Past Chair**

Rancho Financial  
President and Owner

**G. Douglas Moir, M.D.**

Graybill Medical Group  
Physician

**Donald Belcher**

Banta Corporation  
Chairman and CEO, Retired

**Fred Nasser**

Unicorn Jewelry  
Owner

**John Clark**

American Radiosurgery  
Chairman and CEO

**Tishmall Turner**

California State University San Marcos  
Tribal Liaison  
Rincon Band of Luiseño Indians

**Harold Dokmo**

Civic Leader  
Retired

**Debbie Young**

Sculpt Nouveau  
President & Owner

**Michael Dunlap**

The Rotary Foundation  
Major Gifts Officer

**Kim Young**

Union Bank  
Assistant Vice President

**Kirk Effinger**

Real estate  
Retired

## **Ex-Officio Members 2015-2016**

**Robert A. Hemker**

Palomar Health  
President and CEO

**Jean Larsen**

Palomar Health Foundation  
President and Chief Philanthropy Officer



October 3, 2016

Ms. Colleen R. Lukoff  
President  
San Marcos Community Foundation  
One Civic Center  
San Marcos, CA 92069

Dear Colleen and SMCF Board Members,

First, "thank you", for your past support in helping us start the Fortissimo Orchestral Music Program here in our SMUSD Title I Elementary schools. With your support we are now starting our third year with a goal of increasing our participation from 45 to 100 students, including opening of a second school.

To give you a current overview of our program, plans and impact it is having on our students I am enclosing our current Program Plan (approved by the SMUSD Superintendent and Board) and other information including fund raising status and student/teacher/parent survey results. If you should need any further information for your evaluation please let me know.

Sincerely,

Carole Beeson  
Program Director

- Enclosures: (A) Grant Application/Budget Worksheet  
(B) Program Plan, Fortissimo Orchestral Music Program (SMUSD)  
(C) List of Contributors/Supporters  
(D) Letter of Support/501(C)3 Authorization/990 Excerpt/Financial Statement/Board of Directors for Kid's College  
(E) Survey Results/Student Testimonials



**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**

(Choose one) ☐ **MINI-GRANT** (Choose one) ☒ **REGULAR GRANT**

Project Name: Fortissimo Orchestral Music Program for SMUSD Date Submitted: 10/3/16	Total # of people served: 100 Total # of San Marcos residents served: 200	Amount Requested: \$ 5,000
Non-Profit Organization Name and Address, Website Kid's College 570 Rancheros Drive, Suite 270 San Marcos, CA 92069 Web: www.thekidscollege.org		Contact Person – Name, Title & Phone, email Carole Beeson, Program Director (858) 922-7401 Cbeeson21@gmail.com

Briefly describe your request for funds (to be expanded upon in narrative for regular grant):

Requested funds are for the continued implementation and expansion of the Fortissimo Orchestral Music Program in SMUSD Title I elementary schools. The program, a partnership between Kid's College and the SMUSD, is beginning its third year with the goal of doubling our students from 45 to 100, including starting at one additional school. The funds are requested for instructors, instruments, music books, music stands and program management. Please see the enclosed Program Plan, dated July 2016 for a complete overview of the current plan.

Briefly describe the significance of your request to the San Marcos community:

The impact on the participating 3<sup>rd</sup>, 4<sup>th</sup>, and 5<sup>th</sup> graders in low socio-economic circumstances is transformational in terms of improving self-confidence, self-esteem, academic performance and social behavior. In short, they will become better, and productive, citizen as they mature to adulthood.

Please attach the following items.

**Both Mini-Grant & Regular:**

1. Budget for request (use SMCF Budget Worksheet)
2. Annual Operating budget for the organization or unit
3. Federal & State Tax ID numbers
4. Board of Directors listing with affiliations

**5. Regular Grants Only:**

Expected date project will begin/end: on-going

Date by which funds will be expended: 12/16

Signature of President or Authorized Officer

*Carole Beeson* 10-03-16  
Name, Title Date

# SAN MARCOS COMMUNITY FOUNDATION

## Budget Worksheet

Provide an itemized list of expenses for this project:

(example – 72 bicycle helmets at \$7.80 each including tax = \$561.60)

__ Violins (32 @ \$299)_____	\$ 9,568
__ Violas (12 @ \$365)_____	4,380
__ Cellos (6 @\$750)_____	4,500
__ Instrument Maint. _____	4,344
__ Music Books _____	500
__ Program Dirrect. _____	9,000
__ Instructors _____	31,600
__ Music Stands/Etc. _____	2,050
__ Admin (Acct, Etc) _____	6,594
_____	\$ _____
_____	\$ _____

**Total budget for this PROJECT:** **\$ 72,536**

**Grant Request Amount:** **\$ 5,000**

*(Mini-grants not to exceed \$1,500, Regular grants not to exceed \$10,000.)*

Is this a challenge grant?

Could it be?

**Please list any other funding sources for this project.**

**\*\*Indicate if funds are committed (C), conditional (CD), or pending (P).**

\$ 10,000 _____	(Name of source) _____	County of San Diego _____	** P
\$ 5,000 _____	(Name of source) _____	Classics for Kids _____	** P
\$ 35,000 _____	(Name of source) _____	Ann Hunter _____	** C
\$ 3,000 _____	(Name of source) _____	Staples Foundation _____	** C

<ul style="list-style-type: none"> <li>a. 1-2 page narrative</li> <li>b. First 2 pages of Federal 990</li> <li>c. Most recent year-end Statement or Audit including any management letters associated with Audit.</li> <li>d. Signature of President or Authorized Officer on Application</li> <li>e. Optional: letters of support</li> </ul>	<div style="border: 1px solid black; height: 20px; margin-bottom: 10px;"></div> <p>Submit Via Mail, In Person or Via Email to:  San Marcos Community Foundation  c/o City of San Marcos  1 Civic Center Drive  San Marcos, CA 92069  Email (PDF Format): <a href="mailto:mgordon@san-marcos.net">mgordon@san-marcos.net</a></p>
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# *FORTISSIMO!*

Program Plan  
Orchestral Music Program  
San Marcos Unified School District  
Title 1 K-5

Prepared By:  
Kid's College/SMUSD  
July, 2016

# Table of Contents

**I** Goals

**II** Background

**III** Student/Community Benefits

**IV** Program Implementation

**V** Management/Staffing

**VI** Financial Projections – Estimate of Costs

# GOALS:

## Goal 1

- Continue the implementation and expansion of the program in the San Marcos Unified School District Title I Elementary Schools modeled after the "El Sistema" program developed in Venezuela and currently conducted in some 90 school districts in the United States.

## Goal 2

- Create a transformational experience for students in low socio-economic circumstances at no cost to the students. Based on a foundation of music education guide and teach students in a collaborative team environment resulting in improved self-confidence, self-esteem, academic performance and social behavior.

## Goal 3

- Develop partnerships within the community--public and private--including music organizations, universities, colleges and community leaders to support and promote the program.





El Sistema started 36 years ago in Caracas, Venezuela with 11 children gathered together to play music. It now teaches 300,000 children of Venezuela's poorest children with dramatic results, both for the children and their communities.

The results through learning to play music include self-esteem, teamwork, improved academic skills and positive behavior changes.

The founder, Dr. Jose Antonio Abreu, says:

"The huge spiritual world that music produces in itself ends up overcoming material poverty. From the minute a child's taught how to play an instrument he, or she, is no longer poor. He, or she, becomes a child in progress, heading for a professional level, who'll later become a contributing citizen."

This program is now worldwide with some 90 school districts participating in the United States. Southern California has programs in Los Angeles, Riverside, Pasadena, Temecula, and Chula Vista. We have collaborated with the three year old Chula Vista "Opus" project leadership in developing our model.

For a visual overview please google "El Sistema" 60 Minutes segment.

# III Student/Community Benefits

## Student Benefits:

Learning and playing music in an ensemble environment teaches cooperation, collaboration and discipline. These behaviors translate into improved academic performance and improved social behavior.

An equally important benefit is family engagement including booster clubs, liaison with other parents and deeper engagement in their students' education.



## Community Benefits:

Performances by the students, both at school and in the community, strengthen neighborhoods and strengthen bonds between students, parents and other members of the community.

Community service with high school and college students fulfilling their "community service" requirements as coaches.



# IV Program Implementation

## **Phase 1** (January 2015-June 2015)

Establish an orchestral music program at one SMUSD Title I school - GOAL ACHIEVED

- Joli Anne Leichtag

**Grade Level** - 3<sup>rd</sup> grade only (25 students)

**Frequency** - Three days a week (Tues, Wed, Thurs) for two hours after school

**Instructors** - One professional per 25 students with coaches as assistants

**Measurement** - Monitor and measure musical, academic and behavioral performance using longitudinal techniques

**Performances** - Individual school performances for families and combined school performances (2/year) for the community

## **Phase 2** (September 2015 - June 2016)

One school:

- Joli Anne Leichtag: 3rd and 4th grade - 45 students - Goal Achieved

## **Phase 3** (September 2016- June 2017)

- Two schools - 3rd, 4th, and 5th grade at Joli Anne Leichtag and San Marcos Elementary 3rd grade

## **Phase 4** (Schedule to be determined)

Add orchestral program to other Title 1 Elementary Schools- after school, middle and high school curriculums in accordance with SMUSD Strategic Plan

# V Management/Staffing

The program will be sponsored and administered by Kid's College and in partnership with the SMUSD. Kid's College will conduct the program within the Policies and Procedures of the SMUSD and the individual schools.

## Program Director

Direct, coordinate and oversee all activities required to develop and implement the program, including instructor recruitment/selection, marketing, student/instructor administration, and liaison with all involved parties.

## Instructors

Develop music curriculum, instruct students, and coach attitude/behavior.

## Coaches

Assist Instructors before, during and after classes and performances as directed by the instructor





## VI Financial Projections

Estimates of cost for Phase 3 are based on the Program Implementation Plan and the following assumptions:

- Phase 1 and 2 costs are actual costs:
- \* Each school will have 25 students the first year and add 25 students each year for three years.

1/2 Year:  $25 \times 1 = 25$

Year 2:  $50 \times 1 = 50$

Year 3:  $(75 \times 1) + (1 \times 25) = 100$

- \* Student/Instructor Ratio: 25/1
- \* Program is being conducted within the partnership guidelines contained in the Memo of Understanding of 10/21/14 between Kid's College and SMUSD.
- \* Coaches are community service volunteers (Palomar College Music Department, CSUSM)
- \* Facility use fees waived by the SMUSD.
- \* Kid's College will provide:
  - Program Directors, Instructors, Coaches
  - Promotional/Collateral Material
  - Instruments/Maintenance
  - Website



# Estimates of Cost

	1/15-6/15 Phase 1		9/15-6/16 Phase 2		9/16-6/17 Phase 3	
	No.	Actual Cost	No.	Actual Cost	No.	Cost
Schools	1		1		2	
Students	25		50		100	
Violins/Bows/ Cases	16	\$4,784	16	\$4,784	32	\$9,568
Violas/Bows/ Cases	6	2,190	6	2,190	12	4,380
Cellos/Bows/ Cases	3	2,250	3	2,250	6	4,500
Instrument Maint.	25	1,250	50	2,172	100	4,344
Music Books	25	250	25	250	50	500
Program Director	1	3,000	1	6,000	1	9,000
Music Instructors	1	6,715	2	16,840	4	31,600
Coaches	1	N/C	2	N/C	4	N/C
Music Stands/ T-Shirts	25	875	25	875	50	2,050
Admin (Accounting, Payroll, Insurance)		2,080		3,536		6,594
Total		\$23,394		\$38,897		72,536

## Unit Cost:

Instructors: \$40/Hr

Violins: \$299

Violas: \$365

Cellos: \$750

Instrument Repair/Tuning: \$50/Unit 1st year; 10% of  
Cost After

Music Books: \$10

Music Stands: \$35

FORTISSIMO  
 SAN MARCOS UNIFIED SCHOOL DISTRICT  
 ORCHESTRAL PROGRAM  
 TITLE I ELEMENTARY SCHOOLS  
 October 1, 2016

CONTRIBUTORS/SUPPORTERS:

- San Marcos Unified School District Superintendent/Board (Authorized program/advocates and provides logistical support)
- San Diego Youth Symphony (Advisors and the loan of any string instrument needed as well as training our teaches and consulting—instruments valued at \$12,000)
- Classics for Kids Foundation (\$5,000 matching grant received in Jan. 2014 for our own instruments)(\$2,000 matching grant in 2015)
- Supervisor Bill Horn Community Reinvestment grant (\$5,000match grant for instruments) received June 2014
- San Marcos Community Foundation (\$5,000 donation)(\$2,000 in 2015)
- Hitzke Development Corporation (\$500 donation)
- Altman Nursery (\$200 donation)
- San Marcos Kiwanis Club (Hosted a \$200 Kick off Luncheon)
- Cal State University San Marcos Center/Artes (Advisors and coaches)
- Palomar College Music Department (Music students will receive credit for serving as coaches)
- San Marcos Historical Society hosted fundraiser
- Kid's College (Program development)
- Stone Brewery fund raiser support - \$300
- San Marcos Arts Council \$750
- Greg and Betty Evans Family \$1,400
- Dr. Ingrid Sharpf \$250
- Mission Federal Credit Union \$2,500
- Ann Hunter (Hunter Industries) - \$10,000
- Jim Desmond - \$250
- Charlie/Jane McGee - \$2,000



- Kiwanis Lake San Marcos - \$500
- Steve/DeeDee Beeson - \$200
- David/Laura Collins - \$250
- James Meade - \$250
- Larry/Linda Loughnane - \$100
- Pinkas Family Foundation - \$5,000
- San Marcos Rotary Club - \$250
- Roberto Mendoza (Parent) - \$20
- Belem & Gael Medina (Parents) - \$44
- Aaron Eighmey Memorial Foundation - \$2,300
- Sunwest Bank - \$2,000

2016:

- Ann Hunter (Hunter Industries) - \$20,000 (1/16)
- Supervisor Bill Horn Community Reinvestment grant - \$5,000
- Jim Desmond - \$100
- Mission Federal Credit Union - \$1,500
- Aaron Eighmey Memorial Foundation - \$1,000
- Ann Moore Corley - \$300
- Susan Halfaker - \$300
- Lusardi - \$1,000
- Ann Hunter (Hunter Industries) - \$20,000 (7/16)
- Don/Lone Beeson - \$100
- Staples Foundation - \$3,000

September 27, 2016

Ms Colleen R. Lukoff  
President  
San Marcos Community Foundation  
One Civic Center  
San Marcos, CA 92069

Dear Colleen and Members of the Board,

First, I would like to again thank you, and your Board Members, for their past support of the Fortissimo Orchestra Music Program in the SMUSD. Your grants in 2014 and 2015 for instruments and operating expenses were significant in getting the program started. This year Kid's College, through their continued management and funding of the program, plans to double the program size from 45 to 100 students by opening a second Title I elementary school. The requested \$5,000 grant would be a significant step in making this happen and accelerating our goal of eventually providing the program to all of our elementary schools.

I think you will agree after reviewing the enclosed Program Plan and supplemental material that the Program is meeting it's goals and, most importantly, positively impacting the lives of these young students from low socio-economic circumstances.

It is my continued hope that our community, businesses, and foundations will continue to stand alongside the San Marcos Unified School District and assist us in providing this transformational program to our most disadvantaged students.

Sincerely,



Kevin Holt, Ed.D

Superintendent, San Marcos Unified School District



**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**

(Choose one) ☐ **MINI-GRANT**    (Choose one) ☒ **REGULAR GRANT**

<b>Project Name:</b> Alzheimer's San Diego: Addressing Alzheimer's and Dementia within San Marcos Community <b>Date Submitted:</b> 10/5/16	<b>Total # of people served:</b> 30,000 <b>Total # of San Marcos residents served:</b> 835	<b>Amount Requested:</b> \$10,000
<b>Non-Profit Organization Name and Address, Website</b> Alzheimer's San Diego 6632 Convoy Court <a href="http://www.alzsd.org/">http://www.alzsd.org/</a>	<b>Contact Person – Name, Title &amp; Phone, email</b> Jessica Empeno, MSW Vice President Programs and Family Services <a href="mailto:jempeno@alzsd.org">jempeno@alzsd.org</a> (858) 966-3305	
<p><u>Briefly describe your request for funds (to be expanded upon in narrative for regular grant):</u> Alzheimer's San Diego is a dynamic, local nonprofit organization committed to supporting all individuals affected by Alzheimer's and dementia in San Diego County. As the only dementia-focused agency in the County, Alzheimer's San Diego is a powerful, local resource within communities like San Marcos to provide innovative, easy to access, specialized support services, educational programs, community support and discussion groups and a volunteer respite program. For San Marcos residents, Alzheimer's San Diego will pilot an innovative, education workshop; Safety and Independence, the first of its kind in North County. This exclusive educational workshop provides attendees current information on the risk of wandering, GPS technology, and simple home modifications to reduce the risk of injuries, falls and medication errors to ensure safety and quality of life for all individuals affected by Alzheimer's and dementia within the San Marcos community.</p>		
<p><u>Briefly describe the significance of your request to the San Marcos community:</u> According to the San Diego Public Health Report, North Inland Region has the second highest prevalence rate of residents living with Alzheimer's or other related dementia diagnoses within the County, illustrating the crucial need for Alzheimer's San Diego's dementia specific services. With one in six residents having a diagnosis of Alzheimer's or dementia it is imperative that San Marcos residents have access to innovative new programs like the Safety and Independence Workshop and specialized programming including educational classes, access to Alzheimer's experts, support and discussion groups, and respite volunteers to serve the growing community need.</p>		
<p>Please attach the following items. <b>Both Mini-Grant &amp; Regular:</b></p> <ol style="list-style-type: none"><li>1. Budget for request (use SMCF Budget Worksheet)</li><li>2. Annual Operating budget for the organization or unit</li><li>3. Federal &amp; State Tax ID numbers</li><li>4. Board of Directors listing with affiliations</li><li>5. <b>Regular Grants Only:</b><ol style="list-style-type: none"><li>a. 1-2 page narrative</li><li>b. First 2 pages of Federal 990</li><li>c. Most recent year-end Statement or Audit including any management letters associated with Audit.</li><li>d. Signature of President or Authorized Officer on Application</li><li>e. Optional: letters of support</li></ol></li></ol>		<p><b>Expected date project will begin/end:</b> 01/01/2017 <b>Date by which funds will be expended:</b> 12/31/2017</p> <hr/> <p><b>Signature of President or Authorized Officer</b>  Name, Title                      Date</p> <hr/> <p><b>Submit Via Mail, In Person or Via Email to:</b> San Marcos Community Foundation c/o City of San Marcos 1 Civic Center Drive San Marcos, CA 92069 Email (PDF Format): <a href="mailto:mgordon@san-marcos.net">mgordon@san-marcos.net</a></p>

Alzheimer's disease is a life-altering degenerative brain disease that slowly deteriorates an individual's memories, cognition, and thinking skills. Alzheimer's and other related dementias are progressive; resulting in drastic changes to one's personality and behaviors and is fatal. While tremendous and valiant efforts are being made within medical research there is no cure or treatment for this disease which can last from 2 to 20 years. Over 62,000 San Diego County residents are living with Alzheimer's or other related dementias and it is ranked the third leading cause of death within the County. Research shows that one in six individuals with Alzheimer's resides in San Marcos and North Inland Region giving it the second highest prevalence rate within San Diego County. By 2030, the number of individuals with a diagnosis of Alzheimer's or other related dementia is expected to increase by 41.8%, solidifying dementia as a serious health epidemic. This fatal disease wreaks havoc on individuals and families in communities like San Marcos, leaving them with lots of questions and limited access to resources. This is where Alzheimer's San Diego can help.

Alzheimer's San Diego is the only local nonprofit organization committed to supporting all individuals affected by dementia, including those with a diagnosis, family members, caregivers and professionals in San Diego County. Alzheimer's San Diego offers community members a multitude of dementia-specific resources to understand the effects of dementia in addition to offering Alzheimer's expert support. Clinical social workers will provide personalized care and guidance either by phone, in-person or over email to offer continual support throughout the disease progression. Within communities like San Marcos, Alzheimer's San Diego offers innovative, one of a kind programming including access to community education classes, support and discussion groups, and a volunteer respite program.

Due to the levels of emotional, physical, and social strain placed on families, Alzheimer's San Diego created ALZ Companions to provide in-home support from highly qualified and trained volunteers. Alzheimer's San Diego offers families respite volunteers to visit in-home and offer companionship to those with a diagnosis for up to 4 hours per week. Besides offering important social engagement opportunities for the client, this gives the family member or primary caregivers a much needed break to rest, relax and recharge. With visits taking place in the client's home, Alzheimer's San Diego is able to cater the experience to each family's needs, providing another level of specialized care.

In addition, many family members and caregivers find it helpful to seek emotional support from one of Alzheimer's San Diego's 37 community Support and Discussion Groups to help process the drastic changes taking place in their lives. Alzheimer's San Diego is currently offering two Support and Discussion Groups in San Marcos, catering to both English and Spanish speakers in addition to offering free respite care to caregivers at specific locations. By attending a Support and Discussion Group led by Alzheimer's San Diego's trained facilitators, community members

can receive the much needed emotional and social support with others who have common experiences in a safe space to grieve, process and grow.

Due to the decline in physical and cognitive abilities associated with dementia, family members are often concerned about the safety and independence of day-to-day life for those living with dementia. With a few simple alterations at home, family members can add years of independence and quality of life for those with a diagnosis. Offered for the first time in North County, Alzheimer's San Diego will pilot an innovative Safety and Independence Workshop to further community members' education in regard to home safety. The Safety and Independence Workshop, led by Alzheimer's San Diego experts, will begin a dialogue with families about how to reduce the risk of wandering incidents and review important home safety tips to reduce injuries, falls, hospitalizations and medication errors for individuals with Alzheimer's or dementia.

Considering six out of ten individuals with dementia will wander, it is imperative for Alzheimer's San Diego to provide San Marcos families the latest information on GPS technology in addition to wandering prevention techniques. At this exciting event, five complimentary, one year enrollments to MedicAlert San Diego will be offered. MedicAlert San Diego, offered in partnership with the MedicAlert Foundation, is a 24 hour emergency response service that provides immediate assistance to those who may wander or who are at risk of a medical emergency. This service offers families the security and satisfaction in knowing the individual with Alzheimer's and dementia will receive quick, medical assistance if necessary.

By having open and supported conversations early and often, individuals and families affected by dementia can continue to make gradual adjustments and receive ongoing support from Alzheimer's San Diego to help ensure access to continual professional guidance and resources which are desperately needed in North Inland Region. With the San Marcos Community Foundation, Alzheimer's San Diego will enhance the supports available to San Marcos residents, ensuring that the community has a one of a kind education with specialized engagement to support and guide individuals and family members through the life-changing event of Alzheimer's and dementia.





**Alzheimers San Diego**  
**FY17 Budget**  
July 1, 2016 through June 30, 2017

**Alzheimer's San Diego**

**FY17 BUDGET  
TOTAL**

**INCOME**

4000 · Contributed Support	\$350,000
4012 · Major Gifts	\$250,000
4100 · Planned Gifts	\$50,000
4200 · Grants	\$476,702
4321 · Corporate Sponsorships	\$220,500
4300 · Earned Revenues - Other	\$1,081,796
<b>Total Income</b>	<b>\$2,428,998</b>

**EXPENSE**

Total 6000 · Personnel Related Expenses	\$1,412,472
Total 6200 · Contract Service Expenses	\$301,558
Total 6300 · Postage, Printing and other Supplies	\$179,300
Total 6400 · Facility and Equipment Expenses	\$164,365
Total 6510 · Other Types of Expenses	\$371,303
<b>Total Expense</b>	<b>\$2,428,998</b>

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

DEPARTMENT OF THE TREASURY

Date: JAN 20 2016

ALZHEIMERS SAN DIEGO  
6632 CONVOY COURT  
SAN DIEGO, CA 92111

Employer Identification Number:  
47-5534541  
DLN:  
17053331316045  
Contact Person:  
JODI L GARUCCIO ID# 31481  
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 9, 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.

ALZHEIMERS SAN DIEGO

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

Sincerely,

A handwritten signature in dark ink, appearing to read 'J. Cooper', with a stylized flourish at the end.

Jeffrey I. Cooper  
Director, Exempt Organizations  
Rulings and Agreements



State of California

**Franchise Tax Board**

PO Box 1286

Rancho Cordova CA 95741-1286

Date: 04.04.16

In reply refer to: 760:GRW:F120

PAUL J. DOSTART, ESQ  
4180 LA JOLLA VILLAGE DR, STE 530  
LA JOLLA CA 92037

Regarding:

Account Number:

3841875

Taxpayer's Name:

ALZHEIMER'S SAN DIEGO

See the enclosed document(s).





State of California  
**Franchise Tax Board**

PO Box 1286  
Rancho Cordova CA 95741-1286

ALZHEIMER'S SAN DIEGO  
6632 CONVOY CT  
SAN DIEGO CA 92111

Date: 04.04.16  
Case: 30820602506309890  
Case Unit: 30820602506309893  
In reply refer to: 760:GRW:F120

Regarding:	<b>Tax-Exempt Status</b>
Organization's Name:	ALZHEIMER'S SAN DIEGO
CCN:	3841875
Purpose:	Charitable
R&TC Section:	23701d
Form of Organization:	Incorporated
Accounting Period Ending:	12/31
Tax-Exempt Status Effective:	11/09/2015

## Exempt Acknowledgement Letter

We have received your federal determination letter that shows tax exemption under Internal Revenue Code (IRC) Section 501(c)(3).

Under California law, Revenue and Taxation Code (R&TC) Section 23701 provides that an organization is exempt from taxes imposed under Part 11 upon submission of the federal determination letter approving the organization's tax-exempt status.

Generally, the effective date of an organization's California tax-exempt status is the same date as the federal tax-exempt status.

To retain tax-exempt status, the organization must be organized and operating for nonprofit purposes within the provisions of the above R&TC section. An inactive organization is not entitled to tax-exempt status.

In order for us to determine any effect on the tax-exempt status, the organization must immediately report to us any change in:

- Operation
- Character
- Purpose
- Name
- Address

For filing requirements, refer to FTB Pub.1068, *Exempt Organizations - Filing Requirements and Filing Fees*. Go to **ftb.ca.gov** and search for **1068**.

This exemption is for state franchise or income tax purposes only. For information regarding sales tax exemption, contact the State Board of Equalization at 800.400.7115 or go to their website at **boe.ca.gov**.

George R. Walker  
Telephone: 916.845.4171  
Fax: 916.845.9501

cc: PAUL J. DOSTART, ESQ



## Board of Directors

**Herb Schnall (Chair)**

Retired CFO, Tribune Publishing

**Marcea Lloyd (Vice Chair)**

Former SVP and General Counsel, Amylin

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Retired Newscaster, KNSD

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Attorney at Law, Dennis A. Schoville, APC

**Bill Smith**

Vice President, Wells Fargo Wealth Advisors

**Doug Sawyer**

Retired CEO, United Way of San Diego

## Latest 990 for Alzheimer's San Diego

The board of the San Diego chapter of the Alzheimer's Association announced on 12/3/15 that it decided to separate from the National Alzheimer's Association.

Alzheimer's San Diego, a new, locally-operated organization was formed in order to best serve those affected by Alzheimer's and dementia in San Diego. Since a full year has not yet passed since the formation of the new organization, no taxes have been filed. However, the organization has past tax records to demonstrate past performance, if applicable.




## Most Recent Audit for Alzheimer's San Diego

The board of the San Diego chapter of the Alzheimer's Association announced on 12/3/15 that it decided to separate from the National Alzheimer's Association. Alzheimer's San Diego, a new, locally-operated organization was formed in order to best serve those affected by Alzheimer's and dementia in San Diego. Since a full year has not yet passed since the formation of the new organization, no audit has been conducted. However, the organization has contracted to audit in October.



**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**

(Choose one) ☐ **MINI-GRANT**    (Choose one) ☒ **REGULAR GRANT**

Project Name: Youth Mentoring Date Submitted: 10/04/2016		Total # of people served: 350 Total # of San Marcos residents served: 30	Amount Requested: \$8,000
Non-Profit Organization Name and Address, Website  Solutions for Change, Inc. 722 W. California Avenue Vista, CA 92083 solutionsforchange.org		Contact Person – Name, Title & Phone, email  Tammy Megison Executive Vice President (760) 941-6545 ext. 304 tammy@solutionsforchange.org	
<p><u>Briefly</u> describe your request for funds (to be expanded upon in narrative for regular grant):</p> <p>Solutions for Change requests funding to support a budding <i>youth mentoring program</i> for formerly homeless youth. Solutions for Change has formed a partnership with the National Mentoring Resource Center to add trauma-informed youth mentoring to our array of services. These funds would help offset the cost of this program, including the hiring of a new Youth Services Director, and supplies and marketing materials. The Resource Center is already working to create custom guides and workbooks for the mentors and the youth.</p>			
<p><u>Briefly</u> describe the significance of your request to the San Marcos community:</p> <p>Family homelessness is a too-often-forgotten aspect of the larger homeless problem that confronts virtually every community, and San Marcos is sadly not immune to this plight. Nationally, regionally, and locally the plight of homeless children and their parents is almost invisible, despite that fact that staggeringly large numbers of people—and futures—are at risk. These children, and their parents require extensive social service intervention and generate huge costs as they ceaselessly cycle from the streets to emergency rooms, temporary shelters, mental health facilities, and other “assistance” that is not a permanent solution. People who could be an asset to society are a burden. The children, without the security of a home or the benefit of a consistent education, become innocent victims.</p>			
Please attach the following items. <b>Both Mini-Grant &amp; Regular:</b> <ol style="list-style-type: none"> <li>Budget for request (use SMCF Budget Worksheet)</li> <li>Annual Operating budget for the organization or unit</li> <li>Federal &amp; State Tax ID numbers</li> <li>Board of Directors listing with affiliations</li> </ol> <b>5. Regular Grants Only:</b> <ol style="list-style-type: none"> <li>1-2 page narrative</li> <li>First 2 pages of Federal 990</li> <li>Most recent year-end Statement or Audit including any management letters associated with Audit.</li> <li>Signature of President or Authorized Officer on Application</li> <li>Optional: letters of support</li> </ol>		Expected date project will begin/end: 1/1/2017 Date by which funds will be expended: 12/31/2017  Signature of President or Authorized Officer  <div style="display: flex; justify-content: space-between;"> <span>Name, Title</span> <span>10/4/2016</span> </div> <div style="display: flex; justify-content: space-between;"> <span>Tammy Megison, Executive Vice President</span> <span>Date</span> </div>	
		Submit Via Mail, In Person or Via Email to: San Marcos Community Foundation c/o City of San Marcos 1 Civic Center Drive San Marcos, CA 92069 Email (PDF Format): <a href="mailto:mgordon@san-marcos.net">mgordon@san-marcos.net</a>	

**SAN MARCOS COMMUNITY FOUNDATION**  
**Budget Worksheet**

Provide an itemized list of expenses for this project:  
(example – 72 bicycle helmets at \$7.80 each including tax = \$561.60)

<u>Manager of Youth Services – Part Time, 20 hours/week</u>	<u>\$18,554</u>
<u>Case Manager – Program Liaison, Part Time 8-10 hours/week</u>	<u>\$10,400</u>
<u>Payroll Expense (25%) – taxes, benefits, insurance</u>	<u>\$7,238</u>
<u>Supplies – office supplies, training supplies</u>	<u>\$3,600</u>
<u>Marketing Materials/Advertising</u>	<u>\$4,750</u>

**Total budget for this PROJECT:** **\$44,542**

**Grant Request Amount:** **\$8,000**  
(Mini-grants not to exceed \$1,500, Regular grants not to exceed \$10,000.)

Is this a challenge grant? No

Could it be? N/A

**Please list any other funding sources for this project.**

**\*\*Indicate if funds are committed (C), conditional (CD), or pending (P).**

<u>\$25,000</u>	<u>Welk Family Foundation</u>	<u>** C</u>
<u>\$2,500</u>	<u>National Mentoring Resource Center</u>	<u>** C</u>
<u>\$9,000</u>	<u>Country Friends</u>	<u>** P</u>
<u>\$5,000</u>	<u>Diane and Bruce Halle Foundation</u>	<u>** P</u>
<u>\$3,000</u>	<u>Boys and Girls Foundation</u>	<u>** P</u>

## Solutions for Change Organization Budget 2016

### Income

Fundraising	\$700,000
Foundations	\$650,000
Public Funds	\$319,100
Donations	\$400,000
Developer Fee	\$136,000
Property Management	\$125,106
Rent	\$550,000
Laundry & Vending	\$25,000
Damages & Cleaning Fees	\$2,000
NSF & Late Charges	\$1,200
Vacancy	(\$12,535)
Social Enterprise	\$55,000
<b>Total Income</b>	<b>\$2,950,871</b>

### Expenses

Salaries	\$1,210,708
Benefits	\$72,000
Payroll Taxes	\$103,035
Workers Comp	\$52,552
Meetings, Training & Travel	\$25,000
Advertising	\$90,000
Fundraising Expense	\$325,000
Professional Fees	\$145,000
Property and Liability Insurance	\$90,000
Rent	\$121,500
Repairs/Maintenance	\$131,000
Telephone/Communications	\$55,000
Utilities	\$190,000
Supplies	\$95,000
Dues/Subscriptions	\$2,500
IT	\$30,000
Payroll Expense	\$5,400
Interest	\$134,090
Taxes, license, permits & fees	\$37,500
<b>Total Expenses</b>	<b>\$2,915,285</b>

Sale 1148 Melrose net	\$208,683
Pledges Receivable	\$307,400
Other Costs:	
Replacement Reserves	(\$40,333)
Principal Payments	(\$303,416)
A/P 2015	(\$137,815)
Flexible Subsidy	(\$70,105)
<b>Total</b>	<b>\$0</b>

Non-cash Expenses:

Depreciation	\$517,505
Amortization	\$1,500

OGDEN UT 84201-0029

In reply refer to: 4077550286  
July 22, 2014 LTR 4168C 0  
33-0902617 000000 00  
00029243  
BODC: TE

SOLUTIONS FOR CHANGE INC  
% MICHAEL C MEGISON  
722 W CALIFORNIA AVE  
VISTA CA 92083-3565



003156

Employer Identification Number: 33-0902617  
Person to Contact: MS SINGLETON  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your June 05, 2014, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in JUNE 2000.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

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.

Please refer to our website [www.irs.gov/eo](http://www.irs.gov/eo) for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.



July 18, 2000  
NORTH COUNTY SOLUTIONS FOR CHANGE, INC.  
ENTITY ID : 2048058  
Page 2

under Section 23731 of the Code. In this event, you are required to file Form 109 (Exempt Organization Business Income Tax Return) by the 15th day of the 5th month (4 1/2 months) after the close of your annual accounting period.


Please note that an exemption from federal income or other taxes and other state taxes requires separate applications.


A copy of this letter has been sent to the Registry of Charitable Trusts.

J AMAYA  
EXEMPT ORGANIZATION SECTION  
PROCESSING SERVICES BUREAU  
TELEPHONE (916) 845-6644

EO :  
CC :LAWRENCE J KAPLAN

OGDEN UT 84201-0029

003156.318241.149844.7057 1 AT 0.406 536  


  
SOLUTIONS FOR CHANGE INC  
% MICHAEL C MEGISON  
722 W CALIFORNIA AVE  
VISTA CA 92083-3565

003156

CUT OUT AND RETURN THE VOUCHER AT THE BOTTOM OF THIS PAGE IF YOU ARE MAKING A PAYMENT,  
EVEN IF YOU ALSO HAVE AN INQUIRY.

The IRS address must appear in the window.  
BODCD-TE 4077550286

Use for payments

Letter Number: LTR4168C  
Letter Date : 2014-07-22  
Tax Period : 000000

INTERNAL REVENUE SERVICE

OGDEN UT 84201-0029  




\*330902617\*

SOLUTIONS FOR CHANGE INC  
% MICHAEL C MEGISON  
722 W CALIFORNIA AVE  
VISTA CA 92083-3565

330902617 NI NORT 00 2 000000 670 000000000000



STATE OF CALIFORNIA  
FRANCHISE TAX BOARD  
PO BOX 1286  
RANCHO CORDOVA CA 95741-1286

In reply refer to  
755:G :JCA

July 18, 2000

NORTH COUNTY SOLUTIONS FOR CHANGE INC  
245 BLOCKTON RD  
VISTA CA 92083-7671

Purpose : CHARITABLE  
Code Section : 23701d  
Form of Organization : Corporation  
Accounting Period Ending: December 31  
Organization Number : 2048058

You are exempt from state franchise or income tax under the section of the Revenue and Taxation Code indicated above.

This decision is based on information you submitted and assumes that your present operations continue unchanged or conform to those proposed in your application. Any change in operation, character, or purpose of the organization must be reported immediately to this office so that we may determine the effect on your exempt status. Any change of name or address must also be reported.

In the event of a change in relevant statutory, administrative, judicial case law, a change in federal interpretation of federal law in cases where our opinion is based upon such an interpretation, or a change in the material facts or circumstances relating to your application upon which this opinion is based, this opinion may no longer be applicable. It is your responsibility to be aware of these changes should they occur. This paragraph constitutes written advice, other than a chief counsel ruling, within the meaning of Revenue and Taxation Code Section 21012(a)(2).

You may be required to file Form 199 (Exempt Organization Annual Information Return) on or before the 15th day of the 5th month (4 1/2 months) after the close of your accounting period. Please see annual instructions with forms for requirements.

You are not required to file state franchise or income tax returns unless you have income subject to the unrelated business income tax



## 2016 Board of Directors

**David H. Crean, Ph.D.**, Chairman  
Managing Director, Life Sciences  
12520 High Bluff Drive, Suite 275  
San Diego, CA, 92130  
[davidhcrean@gmail.com](mailto:davidhcrean@gmail.com)  
(858)461-9490  
(858) 245-4905

**Mark Fingerlin**, Treasurer  
Vistage, Chair  
1441 Main St #315  
Ramona, CA 92065  
[Mark.fingerlin@vistagechair.com](mailto:Mark.fingerlin@vistagechair.com)  
(760) 846-6092

**Leanne Abraham**, Secretary  
Premierehire, President  
2382 Camino Vida Roble Suite 114  
Carlsbad, CA 92011  
[Leanne@premierehire.com](mailto:Leanne@premierehire.com)  
(760)-579-0248  
(760)-805-2688

**Teresa Shaffer**-Director  
Retired Teacher and Special Education  
Administrator  
[Teresashaffer7@gmail.com](mailto:Teresashaffer7@gmail.com)  
1-761-936-6609

**John Conrad**-Director  
Senior Accountant, Alvarado Hospital  
[Jpconrad69@att.net](mailto:Jpconrad69@att.net)  
619-229-3269

**Jack Landers**-Director  
Teague Insurance Agency  
4700 Spring St #400  
La Mesa, CA 91942  
[JLanders@teagueins.com](mailto:JLanders@teagueins.com)  
(619) 668-2379  
(619) 838-0359

**Chris Smith**-Director  
Director, St. Thomas More Catholic Church  
1450 South Melrose Drive  
Oceanside, CA 92056  
[ChrisS@stmoside.org](mailto:ChrisS@stmoside.org)  
(760) 758-4100

**Jerry Watson**-Director  
Retired Communication Specialist  
6648 Oakridge Road  
San Diego, CA 92120  
[jrwatson@cox.net](mailto:jrwatson@cox.net)  
(619) 287-0484

**Lenna Wright**-Director  
District Representative for Congressman Issa  
[wrightlenna@gmail.com](mailto:wrightlenna@gmail.com)  
760-599-5000

**Bret Schanzenbach**-Director  
Vista Chamber of Commerce  
[bret@vistachamber.org](mailto:bret@vistachamber.org)  
760-726-1122



Solutions for Change

### Solutions for Change

Regular Grant Request to the San Marcos  
Community Foundation



We feel that our mission of solving family homelessness is in close alignment with your goal “to enrich the quality of life for the community of San Marcos.” With this proposal, we request \$8,000 to support for the most vulnerable members of the North County community – homeless children.

### Background

Solutions for Change is a local nonprofit with 17 years of experience solving family homelessness in North San Diego County – an effort that has led more than 800 families and 2,000 children out of homelessness since 1999. We do this through a 1,000-day partnership with our homeless families which blends affordable housing, educational opportunities, employment training and health-related solutions to solve family homelessness *permanently*.

A homeless child is often the latest in a multi-generational cycle of poverty. We welcome a partnership that would help us *break this tragic cycle* by targeting the physical, psychological and emotional damage that often results from the circumstances under which they’ve lived. Our programs emphasize personal growth, bring families back together, and help individuals learn how to give back to their community as neighbors, employees, and volunteers. Communities cannot thrive with children, mothers, and fathers who do not have a safe and stable place to call home. In treating causative factors, Solutions also helps to prevent future families from ending up without a home.

The Solutions model is built on three pillars—Solutions University, Solutions Enterprises, and Solutions in the Community. Solutions University is a 1000-day partnership with a family to provide access to the skills, knowledge, and resources they need to gain and maintain physical, mental, and financial health.

Solutions Enterprises is a unique blend of experiential learning and revenue generating businesses. Our current portfolio consists of Solutions Farms, and our real estate enterprises. Each enterprise offers opportunities for residents to learn marketable, real-world skills, and gain knowledge of how the business world operates.



Meanwhile, Solutions in the Community allows resident families to give back through participation in events and charitable efforts. For many, this is their first such experience. They understand that they have responsibilities to others, and benefit from knowing that others feel that same responsibility and concern toward them.

### Youth Mentoring Program

In accordance with The National Center on Family Homelessness recommendations, Solutions for Change seeks to add trauma-informed youth mentoring to our toolkit of services to this vulnerable population. The youth and adolescents that enter the doors of Solutions for Change often require additional support in order to mitigate the stress that they have endured and set them on a course for success. Many of these youth are also in desperate need of a male role model.

With this need in mind, Solutions for Change has partnered with the National Mentoring Resource Center to build a robust and high-quality mentoring program for the youth of our community. Studies show that youth mentoring consistently produces positive improvements in confidence, social and academic competence, connection with others, integrity, and compassion for others. The Resource Center is creating custom guides and workbooks for the mentors and youth, which will include trauma-informed training. Solutions will also hire a Youth Services Director to oversee the program, and existing staff will receive extensive training on how to effectively mentor youth in this demographic. Solutions will also develop an advisory team to provide further guidance to the program.

At Solutions, we look at things differently. Our focus is assisting the whole individual and solving the problem. We know homelessness is not just about nutrition; not just about mental health; and, not just about having a roof over one's head. It is a multitude of causal factors that have led our families to this point, and it will be a targeted response to these factors that will lead them permanently out of homelessness.

If you agree that our goals are aligned, we would welcome the opportunity to partner, once more, with the San Marcos Community Foundation to benefit the homeless families of San Marcos. Solutions for Change is grateful to the San Marcos Community Foundation for its past support and its consideration of this request. We welcome any inquiries and look forward to a successful, ongoing partnership benefitting families in need and all of San Marcos.

**SAN MARCOS COMMUNITY FOUNDATION**  
**Grant Cover Page**



(Choose one) ☐ **MINI-GRANT**    (Choose one) ☒ **REGULAR GRANT**

Project Name: <b>Teacher Training in Restorative Practices</b>  Date Submitted: <b>October 5, 2016</b>	Total # of people served: <b>1,164</b>  Total # of San Marcos residents served: <b>1,164</b>	Amount Requested: <b>\$ 10,000.00</b>
Non-Profit Organization Name and Address, Website <b>Restorative Justice Mediation Program</b> <b>9747 Businesspark Ave., Suite 215</b> <b>San Diego, CA 92131</b> <b>www.sdrjmp.org</b>	Contact Person – Name, Title & Phone, email  <b>Mary Acosta, Program Manager</b> <b>619-280-1993</b> <b>macosta@sdrjmp.org</b>	
<p><u>Briefly</u> describe your request for funds (to be expanded upon in narrative for regular grant):</p> <p>RJMP is requesting funds for the training of 40 elementary/middle/high school teachers and administrators from 4 San Marcos schools in restorative practices, specifically the <i>Discipline That Restores</i> (DTR) program. In addition to providing training to teachers, selected schools will be accompanied in their implementation of the program and 2 teachers from the school district will be trained and certified as DTR trainers to prepare other educators in the process. An educational trip to a Fresno school successfully implementing the <i>Discipline That Restores</i> program will be conducted with up to 6 personnel from selected San Marcos schools.</p> <p>DTR is a step-by-step classroom discipline process designed to increase cooperation, mutual respect and responsibility among students and teachers. Using restorative justice skills and strategies, the DTR program trains educators and administrators in the DTR process, helping them to create a more positive learning environment while actively reducing suspensions and expulsions, including those due to “willful defiance.” The DTR curriculum was developed by Ron and Roxanne Claassen over 20 years ago, and is taught at Fresno Pacific University. RJMP has offered an abridged version of the curriculum to San Diego educators and has already trained dozens in the DTR process. The training and follow up consultations will be provided by certified DTR trainers.</p>		

Briefly describe the significance of your request to the San Marcos community:

Restorative practices such as those taught in the Discipline that Restores curriculum, have been shown to lower school suspensions and expulsions significantly, and empower students and teachers to develop constructive ways to resolve conflicts and reduce disciplinary problems. Research has shown a direct link between youth experiencing suspensions or expulsion from school and their future involvement with the criminal justice system. We hope to interrupt this "*school to prison pipeline*" for at-risk youth, especially for minority students, by preparing teachers and their students to address the conflicts that lead to suspensions and expulsions.

Funding for this project will contribute to the improvement of student/teacher relations and teacher/school relations by holding the parties accountable, and address harms and conflicts in restorative ways. San Marcos schools will experience reduced disciplinary problems and rates of suspensions & expulsions. For schools with already low rates, the training program will provide another effective tool to ensure that they maintain their low rates. Students will commit fewer behavioral and criminal offenses in and out of school. San Marcos teachers will benefit from classroom management skills learned in the DTR program and strategy, contributing to stronger campus communities.

Please attach the following items.

**Both Mini-Grant & Regular:**

1. Budget for request (use SMCF Budget Worksheet)
2. Annual Operating budget for the organization or unit
3. Federal & State Tax ID numbers
4. Board of Directors listing with affiliations

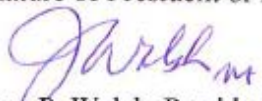
**5. Regular Grants Only:**

- a. 1-2 page narrative
- b. First 2 pages of Federal 990
- c. Most recent year-end Statement or Audit including any management letters associated with Audit.
- d. Signature of President or Authorized Officer on Application
- e. Optional: letters of support

Expected date project will begin/end: 12/1/2016-11/30/2017

Date by which funds will be expended:  
11/30/2017

Signature of President or Authorized Officer

  
James P. Walsh, President  
Name, Title

Oct. 4, 2016  
Date

Submit Via Mail, In Person or Via Email to:  
San Marcos Community Foundation  
c/o City of San Marcos  
1 Civic Center Drive  
San Marcos, CA 92069  
Email (PDF Format): [mgordon@san-marcos.net](mailto:mgordon@san-marcos.net)

1. Budget for Request

**SAN MARCOS COMMUNITY FOUNDATION**

**Budget Worksheet**

Provide an itemized list of expenses for this project:

<u>Item</u>	<u>Amount</u>
1. DTR Trainer stipends, 2 classes at \$1500 each plus follow up at \$400 each	\$3,800.00
2. Supplies- 40 sets of books, posters, cards at \$40/ set including tax & shipping	\$1,600.00
3. DTR Trainer travel stipends, 4 follow up sessions at \$25 each	\$ 100.00
4. RJMP Training Coordinator (10%)	\$3,120.00
5. RJMP Program Manager (4%)	\$2,780.00
6. Train the Trainer certification process (2 persons) with FPU and DTR authors	\$1,500.00
7. Educational learning trip to Fresno School implementing DTR, 6 persons	\$ 910.00

**Total budget for this PROJECT:** **\$13,810.00**

**Grant Request Amount:** **\$10,000.00**

Is this a challenge grant? NO Could it be? NO

**Please list any other funding sources for this project.**

**\*\*Indicate if funds are committed (C), conditional (CD), or pending (P).**

1. \$3,810.00 Catholic Campaign for Human Development, \*\* C

## 2. Annual Operating Budget

Restorative Justice Mediation Program			
2016 OPERATING BUDGET			
	<i>2016 Budget</i>	<i>In-kind Support</i>	<i>Budget plus In-Kind Support</i>
<b>Ordinary Revenue/Expense</b>			
<b>Revenue*</b>			
Donations, Grants, Training Revenue	149,086	113,950.00	263,036
<b>Total Revenue:</b>	<b>149,086</b>	<b>113,950.00</b>	<b>263,036</b>
<b>Expense</b>			
Operating expenses, payroll, travel, training	148,149	113,950.00	262,099
<b>Total Expense:</b>	<b>148,149</b>	<b>113,950.00</b>	<b>262,099</b>
<b>Surplus(Deficit):</b>	<b>937</b>	<b>0</b>	<b>937</b>



3. Federal and State Tax ID numbers

**Organization Name:** Victim Offender Reconciliation Program of San Diego County, Inc., DBA Restorative Justice Mediation Program

**Federal Tax ID#:** 33-0570564

**State Tax ID #:** 24-4122-8

4. Board of Directors

**Restorative Justice Mediation Program  
Board of Directors  
2015-2017**

**Jim Walsh**

**Board President**

Restorative Justice Program Director  
Office for Social Ministry  
Roman Catholic Diocese of San Diego  
San Diego

**John Cox**

**Board Secretary/Treasurer**

Founder  
Cox, Oakes & Associates, Ltd. Law Firm  
Cox Financial Group, Ltd  
San Diego

**John McGinnis**

**Member**

Co-founder  
Del Mar Pacific Construction  
San Diego

**Daniela Reali**

**Member**

Deputy Public Defender  
San Diego County Public Defender's Office  
San Diego

**Greg Potenziani**

**Member**

## 5. (a) Narrative

There is a strong link between students being suspended from school and the likelihood of dropping out of school. Youth who drop out of school are eight times more likely to be incarcerated.<sup>i</sup> Restorative Justice Practices can help disrupt this “school-to-prison pipeline.”

As a non-profit organization working with justice system-involved youth for over 23 years in San Diego County communities, including San Marcos, the Restorative Justice Mediation Program (RJMP) is vested in helping youth, especially those at risk of involvement with the justice system, to learn appropriate and healthy ways of dealing with conflict and staying in school. Schools that use restorative ways of handling student discipline experience fewer suspensions and expulsions and increased graduation rates.<sup>ii</sup> RJMP would like to partner with the San Marcos Community Foundation to offer San Marcos schools struggling with student misbehavior and suspensions, training in restorative practices in the classroom to combat these problems.

The School to Prison Pipeline (ibid.)

The metaphor “school-to-prison pipeline” is used to describe the increasing patterns of contact students have with the juvenile and adult criminal justice systems as a result of the practices implemented by educational institutions, specifically zero tolerance policies and the use of police in schools.

Exclusionary disciplinary policies that remove students from the school environment increase the probability of a youth coming into contact with the incarceration system. Punishing a disruptive student by taking a student out of the learning environment is counterproductive. It fails to address the problems a child is facing at school or at home. In fact, research indicates that a single suspension in 9th grade equates to a 32 percent risk of the student dropping out of school.<sup>iii</sup> San Marcos schools are not exempt from discipline, suspension and expulsion problems. District Accountability Report Cards of several San Marcos schools indicate a higher average of suspensions than the district average, and in some, the state average.

Research is increasingly examining the connections between school failure and later contact with the criminal justice system for minorities. Once a child drops out, he or she is eight times more likely to be incarcerated than youth who graduate from high school. Studies have found that 68% of all males in state and federal prison do not have a high school diploma.

To address and help dismantle the school to prison pipeline, a growing number of California school districts have adopted restorative justice practices as an alternative to traditional responses to student misbehavior in schools. With Assembly Bill 420 recently signed into law limiting suspensions and expulsions for the reason of “willful defiance”, the State of California is now strongly encouraging schools and districts to launch restorative justice based discipline.

Last year, RJMP brought to San Diego County schools a model for addressing the problem called *Discipline That Restores* (DTR). DTR is a step-by-step classroom discipline curriculum developed by leaders in the field of restorative justice and schools. Using restorative justice principles and strategies, the DTR program trains educators in a restorative discipline process, helping them to create a more positive learning environment while actively reducing suspensions and expulsions,

including those due to “willful defiance.” Several schools in Fresno and other northern California school districts have successfully implemented the model. This past year RJMP conducted training to dozens of San Diego County teachers, administrators and other school personnel in DTR with positive results. (See section 5)

School districts that have adopted *Discipline That Restores* have reported a stronger campus community, reduced bullying and fights, and a significant reduction in suspensions and expulsions. Students feel safer, teachers feel safer, and with reduced conflict and tension in the classroom, the learning environment becomes much more positive and productive. In San Diego, one school district that adopted restorative practices such as those used in DTR, experienced a 60% drop in expulsions across the district between the 2013/2014 and 2014/2015 school years.

RJMP is requesting funding from the San Marcos Community Foundation to help fund the training and support of 40 elementary/middle/high school teachers from four San Marcos schools (of the San Marcos Unified School District or Charter Schools) in the *Discipline that Restores* (DTR) program. Follow up sessions will be provided with newly trained teachers to support and accompany them in their implementation of the program. Two designated educators from the district will also be trained and certified as DTR trainers to be able to replicate the curriculum in San Marcos schools. Additionally, an educational trip will be arranged for selected school personnel to travel to a Fresno school successfully implementing DTR in order to gain first-hand knowledge about best practices and challenges, and to interact with school staff.

To date, RJMP has received expressions of interest from several SMUSD and Charter schools to participate in this training opportunity. (See section 5) With 40 teachers being trained and one administrator per school participating in implementation meetings and/or educational trip, 44 school personnel will be directly served. The activities of the grant will directly affect the classrooms of the 40 teachers participating, who, at an average of 28 students per classroom, would positively impact 1,120 San Marcos students each year. The total amount of San Marcos residents served during the grant period would be 1,164.

The total budget for this project is \$13,810. Funding from the San Marcos Community Foundation is being requested in the amount of \$10,000. RJMP has committed funding in the amount of \$3,810 from a grant received from the Catholic Campaign for Human Development, a department of the US Conference of Catholic Bishops, to support the DTR project in San Marcos. With full funding, RJMP will be able to serve dozens of San Marcos teachers, impacting over a thousand San Marcos school aged youth this coming year, helping to support positive school climates and fostering healthy resilient students.

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<sup>i</sup> See [https://en.wikipedia.org/wiki/School-to-prison\\_pipeline](https://en.wikipedia.org/wiki/School-to-prison_pipeline) for more information on this topic

<sup>ii</sup> See “Restorative Justice in US Schools: A Research Review”, [www.WestEd.org](http://www.WestEd.org)

<sup>iii</sup> “Sent Home and Put Off-Track”, Robert Balfanz, Vaughan Byrnes, and Joanna Fox, Johns Hopkins University, 2012.

**MINUTES  
SAN MARCOS COMMUNITY FOUNDATION  
GRANT FUNDING COMMITTEE  
SAN MARCOS ROOM  
1 CIVIC CENTER DRIVE  
SAN MARCOS, CA 92069**

**MEETING OF THE GRANT FUNDING COMMITTEE  
WEDNESDAY, OCTOBER, 13, 2016 – 6:00 PM**

**CALL TO ORDER** PRESIDENT LUKOFF called the meeting to order at 6:03 p.m.

**ROLL CALL**

PRESENT: BOARD MEMBERS: CONFREY, LUKOFF, MONAHAN

ABSENT: BOARD MEMBERS: NONE

**ALSO PRESENT** Recording Secretary, Michael Gordon, City Staff Sandra Gallegos, and Kelle Anzalone and Tanis Brown of the San Marcos Historical Society

**OLD BUSINESS**

**1. GRANT AWARD HISTORY**

Noted and filed.

**NEW BUSINESS**

**2. MINI-GRANT PROPOSALS**

**(A) TERI, INC.**

The committee discussed the request for funding in the amount of \$1,500 to fund the Microgreens Social Enterprise program. The committee took no action and deferred a decision to the next meeting.

**(B) SAN MARCOS HISTORICAL SOCIETY**

Kelle Anzalone and Tanis Brown from the San Marcos Historical Society spoke about their request for funding to purchase collection management software and training CDs for the ongoing preservation initiative, and they answered questions from the committee.

**BOARD MEMBER MONAHAN MOVED TO AWARD \$894.00 TO THE SAN MARCOS HISTORICAL SOCIETY TO PURCHASE AASLH MEMBERSHIP, ONLINE TRAINING, SOFTWARE AND SHIPPING. BOARD MEMBER CONFREY SECONDED. MOTION PASSED BY UNANIMOUS VOICE VOTE.**

AYES: CONFREY, LUKOFF, MONAHAN

NOES: NONE

ABSTENTION: NONE

ABSENT: NONE



### **3. REGULAR GRANT APPLICATION PROPOSALS**

#### **(A) CANINE COMPANIONS FOR INDEPENDENCE SOUTHWEST**

The committee discussed the request for funding in the amount of \$5,000.00 to place one skilled dog with a San Marcos resident in need.

#### **(B) PALOMAR HEALTH FOUNDATION**

The committee discussed the request for funding in the amount of \$4,050.00 to fund the training of staff to become facilitators and educate the community on preventing, identifying, and reporting child abuse.

#### **(C) THE KID'S COLLEGE**

The committee discussed the request for funding in the amount of \$5,000.00 to continue the implementation and expansion of the Fortissimo Orchestral Music Program in SMUSD Title 1 schools.

#### **(D) ALZHEIMER'S SAN DIEGO**

The committee discussed the request for funding in the amount of \$10,000.00 to address Alzheimer's and dementia within the San Marcos community through the Safety and Independence workshop.

#### **(E) SOLUTIONS FOR CHANGE**

The committee discussed the request for funding in the amount of \$8,000.00 to support a youth mentorship program for formerly homeless youth.

#### **(F) RESTORATIVE JUSTICE MEDIATION PROGRAM**

The committee discussed the request for funding in the amount of \$10,000.00 to train 40 teachers from San Marcos schools in restorative practices through the Discipline That Restores program.

The committee did not make any recommendations for funding at this time. They need additional information and will contact the applicants.

### **CONSENT CALENDAR**

#### **4. WAIVER OF TEXT – Waived**

#### **5. APPROVAL OF MINUTES – Approved – SMCF Grant Funding Committee Meeting minutes of August 10, 2016.**

#### **6. ORAL COMMUNICATIONS - No members of the public requested to speak.**

### **ITEMS FOR THE GOOD OF THE ORDER**

7. **NEXT MEETING DATE** – The next meeting of the Grand Funding Committee is scheduled for Wednesday, November 9, 2016. The next meeting of the SMCF Board of Directors is scheduled for Tuesday, November 15, 2016.

8. **MISCELLANEOUS**

9. **ADJOURNMENT**

**MOVED BY BOARD MEMBER CONFREY AND SECONDED BY BOARD MEMBER MONAHAN TO  
ADJOURN THE MEETING. MOTION PASSED BY UNANIMOUS VOICE VOTE.**

Meeting adjourned at 7:50 PM.

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Colleen Lukoff, Board President

ATTEST:

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Michael Gordon, Recording Secretary