



San Marcos Community Foundation
Report to City Council – June 28, 2011
Colleen R. Lukoff, President

Key Activities since November 2010 report:

1. Prepared to resume grantmaking from our core fund beginning July 2011 (suspended since November 2008 due to legal constraints and market conditions):
 - a. Updated website with information and links. Applications and calendar available.
 - b. **Educated new board members on grants process**
 - c. **Notified past grantees**
 - d. As of May 30, 2011, our fund balance was \$1,272,051! (Lowest point was March 30, 2009 at \$756,544.34. Highest previous point was June 30, 2008 at \$1,111,499.97). Practice of granting 4-5% of fund balance as of June 30 each preceding fiscal year.
2. **Developed plans to expand our fund through community engagement and fundraising efforts at two workshops in March and April, in addition to two board meetings. Work included benchmarking and review of local, regional, and sector data, and involved community members beyond the board. Committee tasked with developing details, timetable, etc. by August. More details to come as they are completed.**
3. City Arts & Culture grants for 2011 (\$5,500):
 - a. Boys & Girls Club of San Marcos - \$2,000 for Youth Fine Arts Program and Exhibit for youth aged six to 18. Program will be after school August to December 2011, with public display in 2012.
 - b. Friends of Richland Elementary School - \$1,700 for their art docent program, culminating in a community art fair on May 30, 2012.
 - c. Friends of San Marcos Library - \$700 for students to create a documentary about the library and its services to run continuously and feature events and activities.
 - d. San Marcos Historical Society - \$1,100 to help establish Phase One of the 1910 Culture Garden at Heritage Park.
4. Community Interest Fund - Wildlife preservation and education fund balance of \$8,907 available for grantmaking. (This is NOT an endowed fund.). Created from the efforts of the Royal Family and Eric Blehm (and Molly the Owl supporters) – grants are made through our regular process. Grants made:
 - a. San Marcos Rotary - \$1,500 for educational displays at Jack's Pond
 - b. Project Wildlife - \$1,500 for support of their work in San Marcos
5. Honored the Royal Family at the North County Philanthropy Council Volunteer Recognition event in November 2010.
6. Educated ourselves through participation in San Diego Grantmakers events, conferences, and meetings – with particular involvement in the local efforts on the needs of military families.
7. Raised the profile of the SMCF through active participation in North County Philanthropy Council, San Marcos Chamber of Commerce, and San Marcos based non-profit organizations, and by participating at CDBG community needs meeting with city staff.

Plans before our November 2011 report:

1. Begin grantmaking activities from our main fund, starting July 2011!
2. Refine plans and materials for growing the fund by August board meeting.
3. Meet one-on-one with key San Marcos leaders to share, and enlist support for, efforts to grow our fund by securing community donations.
4. Build a targeted constituent communications list, and begin quarterly communications to it.
5. Hold a community event to celebrate the Wildlife Fund and its grantmaking.