



# Laguna Niguel Military Support Committee AGENDA

**REGULAR MEETING OF  
May 17, 2021 - 12:00 p.m.**

*WELCOME TO YOUR MILITARY SUPPORT COMMITTEE REGULAR MEETING!*

In order to minimize the spread of the COVID-19 virus, Governor Newsom has issued Executive Orders that temporarily suspend requirements of the Brown Act which allows the Military Support Committee members to attend meetings virtually/telephonically. If you would like to participate in this meeting, you can participate via the Zoom platform.

Zoom Meeting Participation Information – May 17, 2021, 12:00 PM:

1. Please click the following link to participate in the meeting:  
<https://cityoflagunaniguel-org.zoom.us/j/93722409104?pwd=ODFNVGZoZ1o0U2p5VjJTemlvSnlyUT09>
2. If you do not join with computer audio, you can participate via telephone: US: **+1 888 475-4499; ID:937 2240 9104 Password: 627683** When the time for public comment is introduced for the item on which you wish to speak, press \*9 and let us know you wish to speak.
3. Members of the public who wish to make a comment on a specific agenda item, may submit their comment via email to the committee clerk at [tluketich@cityoflagunaniguel.org](mailto:tluketich@cityoflagunaniguel.org). Comments received by 10:00 a.m. on the date of the meeting will be provided to the Committee Members and will be part of the meeting record.

*Thank you for attending your Laguna Niguel Military Support Committee meeting.*

**City Hall  
30111 Crown Valley Parkway  
(949)362-4300 Fax (949)362-4340  
[www.cityoflagunaniguel.org](http://www.cityoflagunaniguel.org)**

**CALL TO ORDER**

**ROLL CALL**

**INVOCATION – Committee Member Humphrey**

**PLEDGE OF ALLEGIANCE – Committee Member Allen**

**PRESENTATIONS**

**PUBLIC COMMUNICATIONS**

**DISCUSSION ITEMS AND PRESENTATIONS**

**1. Foundation Financial Report**

**Recommendation**

Receive and file report.

**2. City Military Support Committee Account**

**Recommendation**

Receive and file report.

**3. Minutes of the Regular Military Support Committee Meeting on April 19, 2021**

**Recommendation**

Approve as written or amended.

**4. Reports from the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines, USS Stockdale, and 1<sup>st</sup> Assault Helicopter Battalion, 140<sup>th</sup> Aviation Regiment Representatives**

**Recommendation**

Hear reports.

**5. Discuss Returning to In-Person Military Support Committee Meetings**

**Recommendation**

Discuss and approve.

**6. Discuss Changes to the Military Support Foundation's Website**

**Recommendation**

Discuss and approve.

**7. Check Request for the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines Hump to the Cross Hike – Housing for Gold Star Parents**

**Recommendation**

Discuss and approve the check request for the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines Hump to the Cross Hike – Housing for Gold Star Parents, in the amount of \$1,940.00.

**8. Discuss and Approval of a New Logo for the Military Support Committee**

**Recommendation**

Discuss and approve a new logo for the Military Support Committee, not to exceed \$100.00.

**9. Corporate Donors - Report for Fundraising for the Military Support Committee**

**Recommendation**

Hear report.

**10. Approval of Donor Letter**

**Recommendation**

Discuss and approve.

**11. Project Reports from Fundraising Initiatives/Status Updates**

- a. Corporate Donors – Update
- b. Web Opportunities
- c. Legacy Planning (new) to be integrated with other endeavors
- d. Recycling Update
- e. Wine Tasting

**Recommendation**

Hear reports.

**12. Committee Reports**

**Recommendation**

Hear reports.

**ADJOURNMENT**

**LAGUNA NIGUEL MILITARY SUPPORT COMMITTEE**

**Council Member Sandy Rains – Co-Chair  
Council Member Rischi Paul Sharma – Co-Chair**

**Daniel Abrams  
Carole Allen  
Melissa Caldwell  
Elena Faita-Nguyen  
Debra Garnreiter  
John Harms  
Lynn Hoskins  
John Humphrey  
Matt Kenney**

**Kathy Khalifa  
Reed Malleck  
Frank McGrath  
Caroline Swift  
Bill Sundin  
David Tuma  
John Ulrich  
David Weiss  
Stephanie Winstead**

**Sebrina King, First Battalion, Fourth Marines  
Command Master Chief Eli Robles, USS Stockdale  
LT Col Dan Goldsmith, 1<sup>st</sup> Assault Helicopter Battalion,  
140<sup>th</sup> Aviation Regiment**

**Adam Liquori, Laguna Niguel Military Support Foundation Representative**

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Email address.....info@lnmilitarysupport.org  
Website address.....www.lnmilitarysupportfoundation.org

**AFFIDAVIT OF POSTING**

COUNTY OF ORANGE)  
CITY OF LAGUNA NIGUEL)

I, TAMBERLYN LUKETICH, POLICE SERVICES SECRETARY, hereby certify, under penalty of perjury, that I caused the posting of this agenda by 12:00 p.m. on Friday, May 14, 2021 at City Hall, 30111 Crown Valley Parkway, Crown Valley Community Park, 29751 Crown Valley Parkway, and Sea Country Senior and Community Center, 24602 Aliso Creek Road.

POSTED BY:

  
\_\_\_\_\_  
Tamberlyn Luketich, Police Services Secretary

# **Foundation Financial Report**

**Agenda Item No. 1**

2:19 PM  
05/12/21  
Cash Basis

Laguna Niguel Military Support Foundation  
**Income & Expense--Month Summary 2021 (unaudited)**  
March 2021

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	<u>Mar 21</u>
Ordinary Income/Expense	
Expense	
60000 · Program Expenses	<u>528.99</u>
Total Expense	<u>528.99</u>
Net Ordinary Income	<u>-528.99</u>
Net Income	<u><u>-528.99</u></u>

2:16 PM  
05/12/21  
Cash Basis

**Laguna Niguel Military Support Foundation**  
**Income & Expense Detail (Unaudited), 1-4 Marines**  
January through March 2021

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<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Memo</u>	<u>Paid Amou...</u>
<b>Ordinary Income/Expense</b>				
<b>Expense</b>				
<b>60000 · Program Expenses</b>				
<b>61100 · Supplies--Pgm Exp</b>				
03/19/2021		Gonzalez, Kayla	1-4 Marines Kickball Equipment	207.04
03/31/2021		Gonzalez, Kayla	1-4 Marines, Kickball Jerseys	252.00
		Total 61100 · Supplies--Pgm Exp		<u>459.04</u>
		Total 60000 · Program Expenses		<u>459.04</u>
		Total Expense		<u>459.04</u>
		Net Ordinary Income		<u>-459.04</u>
		<b>Net Income</b>		<u><u>-459.04</u></u>



2:08 PM  
05/12/21  
Cash Basis

Laguna Niguel Military Support Foundation  
Balance Sheet Summary (Unaudited)  
As of March 31, 2021

	<u>Mar 31, 21</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
10100 · US Bank Checking	
10110 · Unrestricted Amounts	40,063.85
10120 · Temporarily Restricted Amounts	
10125 · 1-4 Marines	17,845.32
10130 · USS Stockdale	-546.98
<b>Total 10120 · Temporarily Restricted Amo...</b>	<u>17,298.34</u>
<b>Total 10100 · US Bank Checking</b>	<u>57,362.19</u>
<b>10310 · PayPal New</b>	
10315 · PayPal New Unrestricted	1,532.55
10320 · Temporarily Restricted PayPal	
10322 · 1-4 Marines PayPal	104.74
<b>Total 10320 · Temporarily Restricted PayPal</b>	<u>104.74</u>
<b>Total 10310 · PayPal New</b>	<u>1,637.29</u>
<b>Total Checking/Savings</b>	<u>58,999.48</u>
<b>Total Current Assets</b>	<u>58,999.48</u>
<b>TOTAL ASSETS</b>	<b><u>58,999.48</u></b>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Equity</b>	
30000 · Unrestricted Net Assets	61,240.35
Net Income	-2,240.87
<b>Total Equity</b>	<u>58,999.48</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b><u>58,999.48</u></b>

2:17 PM  
05/12/21  
Cash Basis

**Laguna Niguel Military Support Foundation**  
**Income & Expense Detail (Unaudited), USS Stockdale**  
**January through March 2021**

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<u>Date</u>	<u>Name</u>	<u>Memo</u>	<u>Paid Amou...</u>
	<b>Ordinary Income/Expense</b>		
	<b>Expense</b>		
	<b>60000 · Program Expenses</b>		
	<b>61100 · Supplies--Pgm Exp</b>		
02/24/2021	City of Laguna Niguel Finance ...	USS Stockdale Painting Party - Retail Ord...	546.98
	Total 61100 · Supplies--Pgm Exp		546.98
	Total 60000 · Program Expenses		546.98
	Total Expense		546.98
	Net Ordinary Income		-546.98
	<b>Net Income</b>		<b>-546.98</b>

**City Military Support  
Committee Account**

**Agenda Item No. 2**



Laguna Niguel, CA

# Detail vs Budget Report Account Detail

Date Range: 07/01/2020 - 06/30/2021

Account	Post Date	Packet Number	Name	Source Transaction	Pmt Number	Description	Encumbrances	Fiscal Budget	Beginning Balance	Total Activity	Ending Balance	Budget Remaining	% Remaining
							Vendor	Project Account					
100-01-5750	08/19/2020	APPKT00272	Military Support	8/6/20 Luketich	7450	LN Military Support Foundation -	0.00	2,500.00	0.00	1,051.63	1,051.63	1,448.37	57.93 %
	08/27/2020	GLPKT01040	JN04241			Reimbursement for USS Stockdale - Baby Gift Cards purchase (Luketich Cal Card Sept 2020 Statement)			2667 - U.S. BANK NATIONAL ASSOCIATION				42.52
	09/15/2020	APPKT00285	9/6/20 Luketich		7588	Visa charges Tamberlyn Luketich			2667 - U.S. BANK NATIONAL ASSOCIATION				-939.60
	09/21/2020	GLPKT01092	JN04416			LN Military Support Foundation - Reimbursement for Baby Gift Cards and Shipping (McDaniel Cal Card 9/6/20 Statement)							939.60
	09/23/2020	APPKT00287	9/6/20 McDaniel		7588	Visa charges for Matt McDaniel			2667 - U.S. BANK NATIONAL ASSOCIATION				-782.40
	09/25/2020	APPKT00287	28455		7577	Printing for Military Support Committee			1041 - SOLINK INC.	CON0601000			782.40
	10/23/2020	APPKT00299	10/6/20 Luketich		7779	Visa charges for Tamberlyn Luketich			2667 - U.S. BANK NATIONAL ASSOCIATION				297.39
	12/17/2020	APPKT00318	12/7/20 Luketich		8133	Military Support cards/gift cards			2667 - U.S. BANK NATIONAL ASSOCIATION				7.20
	01/22/2021	APPKT00327	1/6/21 Luketich		8301	Military support supplies			2667 - U.S. BANK NATIONAL ASSOCIATION				690.12
	03/08/2021	GLPKT01270	JN05145			LN Military Support Foundation - Reimbursement for Painting with a Twist (Luketich Cal Card 3/8/21 Statement)			2667 - U.S. BANK NATIONAL ASSOCIATION				14.40
	03/10/2021	GLPKT01275	JN05154			Various - Reimbursement for shirt orders (Westway Inv #210412)							-546.98
	03/23/2021	APPKT00346	3/8/21 Luketich		8642	Military Support Committee			2667 - U.S. BANK NATIONAL ASSOCIATION				-105.00
	04/22/2021	APPKT00356	210412		8774	Shirts for Military Support Committee			1809 - MARJORIE S. MCKERNAN				546.98
<b>Report Total:</b>							<b>0.00</b>	<b>2,500.00</b>	<b>0.00</b>	<b>1,051.63</b>	<b>1,051.63</b>	<b>1,448.37</b>	<b>57.93 %</b>

**Detail vs Budget Report**

Date Range: 07/01/2020 - 06/30/2021

**Account Summary**

Account	Name	Encumbrances	Fiscal Budget	Beginning Balance	Total Activity	Ending Balance	Budget Remaining	% Remaining
100-01-5750	Military Support	0.00	2,500.00	0.00	1,051.63	1,051.63	1,448.37	57.93 %
<b>Report Total:</b>		<b>0.00</b>	<b>2,500.00</b>	<b>0.00</b>	<b>1,051.63</b>	<b>1,051.63</b>	<b>1,448.37</b>	<b>57.93 %</b>

### Fund Summary

Fund	Encumbrances	Fiscal Budget	Beginning Balance	Total Activity	Ending Balance	Budget Remaining	% Remaining
100 - GENERAL	0.00	2,500.00	0.00	1,051.63	1,051.63	1,448.37	57.93 %
<b>Report Total:</b>	<b>0.00</b>	<b>2,500.00</b>	<b>0.00</b>	<b>1,051.63</b>	<b>1,051.63</b>	<b>1,448.37</b>	<b>57.93 %</b>

**Minutes of the Regular Military Support  
Committee Meeting on  
April 19, 2021**

**Agenda Item No. 3**

**MINUTES OF THE  
CITY OF LAGUNA NIGUEL  
MILITARY SUPPORT COMMITTEE REGULAR MEETING  
April 19, 2021 @ 12:00 p.m.**

**CALL TO ORDER** Co-Chair Sharma called the Regular Meeting of the City of Laguna Niguel Military Support Committee to order at 12:01 p.m.

**ROLL CALL**

**Present** Dan Abrams, Carole Allen, Melissa Caldwell, Elena Faita-Nguyen, Debra Garnreiter, John Harms, Lynn Hoskins, John Humphrey, Kathy Khalifa, Reed Malleck, Caroline Swift, Bill Sundin, David Tuma, John Ulrich, Stephanie Winstead, Councilmember Sandy Rains, (Co-Chair), Councilmember Risch Paul Sharma (Co-Chair)

Commander Brandon Booher, USS Stockdale  
Tabby Jones, USS Stockdale FRG President  
Christina Garrison, Ombudsman, USS Stockdale

**Absent** Matt Kenney, Frank McGrath, David Weiss  
Sebrina King, 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines

**City Staff** Russell Narahara, Senior Management Analyst  
Tamberlyn Luketich, Police Services Secretary

**INVOCATION** Committee Member Ulrich led the Invocation.

**PLEDGE OF ALLEGIANCE** Committee Member Garnreiter led the Pledge of Allegiance.

**PRESENTATION**

Tamberlyn Luketich, Police Services Secretary presented, for Sebrina King, 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines, the Easter photos from their event.

**PUBLIC COMMUNICATIONS**

None

**DISCUSSION ITEMS**

**1. Foundation Financial Report**

Report received and filed.



## 2. **City Military Support Committee Account**

Tamberlyn Luketich, Police Services Secretary, was available for questions. Committee Member Allen asked what the expense of \$782.40 was charged for, by Matt McDaniel on September 6, 2020. Tamberlyn Luketich, Police Services Secretary, stated that his card was used because there was a limit on her card that was reached.

Report received and filed.

## 3. **Minutes of the Regular Military Support Committee Meeting March 15, 2021**

**A MOTION** was made by Committee Member Ulrich, seconded by Committee Member Allen to approve the Minutes of the March 15, 2021 Regular Meeting of the Military Support Committee.

**Motion Carried 17-0-3**, with Committee Members Kenney, McGrath and Weiss being absent.

## 4. **Reports from the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines, USS Stockdale, and 1<sup>st</sup> Assault Helicopter Battalion, 140<sup>th</sup> Aviation Regiment Representatives**

Commander Brandon Booher, USS Stockdale stated that they are currently located at Port Hueneme for a Combat Systems Assessment and thanked the committee for their support with the Easter event. They are approximately 75 days out from deployment and are in the same port that the ship was originally commissioned in, 12 years ago, so they were able to celebrate the 12<sup>th</sup> Commissioning Anniversary.

Tabby Jones, USS Stockdale FRG President is coordinating a fundraiser for the USS Stockdale and she will send Secretary Luketich the information so members of the Military Support Committee can order T-shirts.

## 5. **Updates on Fundraising Projects for the Military Support Committee**

Committee Member Khalifa and Committee Member Malleck created a corporate donation letter, to be approved by the Co-Chairs, and are asking other members for ideas and new contacts to add to their distribution list. Committee Member Khalifa would like the Military Support Committee Flyer to be updated with a new picture of the Committee Members.

Committee Member Sundin discussed holding a recycling event in conjunction with the car wash. It is labor intensive and not cost effective due to the amount of members needed, and receptacles required. He suggested that recycling of electronics might be more effective.

Committee Member Ulrich suggested having a wine tasting event at Salt Creek Winery and will follow up with more information for this event. Committee Member Faita-Nguyen has two corporations that are interested in donating so she would like the donation letter when it is completed. Committee Member Faita-Nguyen has a donor that would like to contribute \$3,000.00 to the Military Support Foundation.

Committee Member Hoskins had information on the Amazon Smile Campaign and stated that you need to use correct link for this campaign. Once you have the correct link, 5% of your purchase goes to your designated charity. The Go Fund Me Charity offers the lowest transaction fee of 1.9% and she recommends the Foundation sign up directly with Go Fund Me. The city has agreed that the Military Support Committee can advertise a link to direct donors to the Military Support Foundations' website monthly.

Co-Chairs Rains asked that Russell Narahara and Committee Member Hoskins coordinate verbiage for the social media platforms. Committee Member Winstead suggested having more depth to the Military Support Foundation's website including more pictures and a way to donate with various options. She suggested including a post in the Sea Country Newsletter. Co-Chair Rains asked that proposed changes and ideas to the foundation's website, be added to the agenda for the meeting on May 17<sup>th</sup>.

The sub-committee for virtual bingo suggested that the event is suspended and efforts coordinated towards the charity events already mentioned.

**6. Check Request for the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines Homecoming Support**

**A MOTION** was made by Committee Member Ulrich, seconded by Committee Member Abrams to approve the check request for the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines Homecoming Support, not to exceed \$1,500.00.

**Motion Carried 17-0-3**, with Committee Members Kenney, McGrath, and Weiss being absent.

**7. Check Request for the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines "Operation Help-A-Hero"**

**A MOTION** was made by Committee Member Abrams, seconded by Committee Member Tuma to approve the check request for the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines "Operation Help-A-Hero", not to exceed \$1,500.00.

**Motion Carried 17-0-3**, with Committee Members Kenney, McGrath, and Weiss being absent.

## **8. Committee Reports**

Committee Member Abrams mentioned the July 4<sup>th</sup> Run in the Parks will most likely be called off this year. Committee Member Hoskins mentioned Marnie White who delivered 506 boxes of girl scout cookies to Sebrina King, 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines. The Thank You Note Committee is working on getting enough cards to go with the cookies and will be coordinating with Sebrina King for distribution. Committee Member Winstead suggested verbiage on the cards use the term "Hero". Co-Chair Sharma stated that if Veteran is used on the card, the Committee should save those for the appropriate Veterans' event. Committee Member Allen stated that the shed has been given to the American Legion and vaccines will be given out April 22, 2021 from 9:00 a.m. to 5:00 p.m.

## **ADJOURNMENT**

There being no further business before the Committee, Co-Chair Sharma adjourned the meeting at 1:10 p.m. to the Regular Military Support Committee Meeting to be held on May 17, 2021, at 12:00 p.m. via Zoom

**Check Request for the 1<sup>st</sup> Battalion, 4<sup>th</sup> Marines  
Hump to the Cross Hike –  
Housing for Gold Star Parents**

**Agenda Item No. 7**

# LAGUNA NIGUEL MILITARY SUPPORT COMMITTEE/FOUNDATION EVENT PLANNING AND CHECK REQUEST FORM

EVENT/ACTIVITY INFORMATION	
Event Name:	<u>Hump to the Cross - hike</u>
Description:	<u>Reimbursement Housing for 1st Battalion, 1/4 Marines Gold Star Parents</u>
Location:	<u>Camp Pendleton</u>
Event Date:	<u>4/17/21</u> Date Funds Required By: <u>5/21/21</u>

Request Submitted by: <u>John Humphrey</u>	Marines Special Needs sub-committee
Sub-Committee Co-Chair	Sub-Committee Co-Chair

APPROVALS OBTAINED			
Command:	<input checked="" type="checkbox"/> 1/4 Battalion	<input type="checkbox"/> USS Stockdale	<input type="checkbox"/> 1/140th
			<input type="checkbox"/> NA
Committee:	<input type="checkbox"/> Yes	If Yes, approval date: _____	<input type="checkbox"/> Not Obtained

DESCRIPTION OF EXPENSE	UNIT(S) BENEFITED	AMOUNT \$
Housing for 1st Battalion, 4th Marines		\$1,940.00
Gold Star Parents		
<b>Total Amount Requested</b>		<b>\$1,940.00</b>

CHECK PAYABLE TO:	<u>Susan Covington</u>		
STREET ADDRESS:	<u>1164 Nimrod Circle</u>		
CITY:	<u>Corona</u>	STATE:	<u>CA</u> ZIP: <u>92878</u>
TELEPHONE:	<u>949-233-3646</u>	EMAIL:	<u>jjhumphrey606@gmail.com</u>

Submit form to Military Support Committee for approval. If approved, indicate approvals and submit form to the following **WITH ATTACHED RECEIPTS:**

William J. Kelley, III  
Treasurer, Laguna Niguel Military Support Foundation  
24495 Rue de Gauguin, Laguna Niguel, CA 92677  
Tel: (949) 363-7519                      Email: [wjk@kelleyandkelleylaw.com](mailto:wjk@kelleyandkelleylaw.com)

For LNMS Foundation Only:			
Auth 1:	Date:	Auth 2:	Date:

## Anaheim

### 4 nights in Anaheim

Thu, Apr 15, 2021 - Mon, Apr 19, 2021

Entire home/apt · 7 beds · 11 guests



9583 South Rosebay Street  
Anaheim, CA 92804  
United States

Hosted by Sam & Irene Senada

Confirmation code: NMCZFM42FC  
[Go to itinerary](#) · [Go to listing](#)

Traveler: Susan Covington

### Cancellation policy

Cancel before 4:00 PM (on Apr 10) and get a full refund, minus the service fee. [More details](#)

Cutoff times are based on the listing's local time.

### Have a question?

[Visit the Help Center](#)

## Price breakdown

\$375.00 x 4 nights	\$1,500.00
Cleaning fee	\$200.00
Service fee	\$240.00
<b>Total (USD)</b>	<b>\$1,940.00</b>

## Payment

VISA — 4506	\$1,940.00
March 3, 2021 · 7:05:08 PM PST	
<b>Amount paid (USD)</b>	<b>\$1,940.00</b>

#### Airbnb service fee

Includes applicable VAT charges. [Go to Payment Details](#) to view VAT invoice.

#### Airbnb Payments, Inc.

Airbnb Payments is a limited payment collection agent of your Host. It means that upon your payment of the Total Fees to Airbnb Payments, your payment obligation to your Host is satisfied. Refund requests will be processed in accordance with: (i) the Host's cancellation policy (available on the Listing); or (ii) Airbnb's Guest Refund Policy. Terms applicable at [www.airbnb.com/terms](http://www.airbnb.com/terms). Questions or disputes, contact Airbnb Payments, Inc. at +1 (844) 234-2300.

# **Corporate Donors- Report for Fundraising for the Military Support Committee**

**Agenda Item No. 9**

**Report: 17 May 2021**

**Kathy Khalifa  
Reed Malleck**

Thanks to Co-Chairs Rains and Sharma for the guidance which is summarized below (also to Stephanie, who forwarded many of these ideas in the last Meeting)

Corporate fundraising program has overlaps with individual donor programs, website Development etc; so the scope of this project has increased

Fundraising from events (car wash etc) not included here

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### **LNMSC Fundraising**

#### **GOALS:**

- Efficiently provide funding necessary to fulfill the Mission of the LNMSC
- Enhance the visibility and the professionalism of the MSC (Branding; Logo, other)
- \$ Targets for: Corporate donations, Individual donations, Events/programs donations (Do we have these, do we want these?)

#### **GUIDING PRINCIPLES:**

- Communications to be simple, precise, professional; (Ease of use for Donors)
- Easily repeatable, systematized steps for raising funds/collecting donor information.

#### **CONTENTS OF THIS PRESENTATION:**

- Elements of Fundraising Efforts; Corporate and Individual Donors
- Tasks and Assignments
- Draft Donor Letter
- Sample of Remittance Letter



## LNMSC Fundraising; Corporate and Individual Donors

### ELEMENTS

		Corporate donors	Individual donors
Target Audience		Laguna Niguel Businesses	Residents
How to Reach Audience		Chamber of Commerce; list of businesses	?
Solicitation vehicles		Letter (attached) Website Other ?	Letter? Website Other?
Form (options):  Remittance Letter and Website	Cash options	-Check (rtn with remittance ltr) -Credit Card -ACH	
	Estate options	-Will, trust, life insurance	
	Other options	-GoFundMe -Roundup	-Amazonsmile -GoFundMe -Roundup
	Frequency	-One time -Annual -Quarterly -Monthly	
	Donor Contact Info	-In remittance letter -Website (?)	-Remittance letter? -Website (?)
	Donor Honoraria	-In Memory Of -In Honor Of -Other	
	Choice of Unit	-USS Stockdale -1 <sup>st</sup> Battalion, 4 <sup>th</sup> US Marines -1 <sup>st</sup> Assault Helicopter Battalion, 140 <sup>th</sup> Aviation -No choice	
	Notifications	-Donor wishes to notify 'x' -Donor wishes to remain anonymous -Donor does/does not want to be on mailing lists	
Other	Follow-up ('thank you')	-Letters -Other?	
	Tax deduction	-Provide 501( c ) 3 info for donors	

## LNMSC Fundraising; Corporate and Individual Donors

### TASKS and ASSIGNMENTS:

		Corporate donors			Individual donors		
		What	Who	When	What	Who	When
Reaching Target Audience		Obtain updated CC List	Reed M Kathy K		?	?	
Solicitation vehicles		Letter (already drafted): -On letterhead -Mail Merge for mailing/follow up	Tamberlyn? Tamberlyn?		Same letter for individual donors?		
		Website: Update to reflect new fundraising efforts	Webmaster (?)		Same		
Form (options):  Remittance Letter and Website; must have the same form/options.  (From previous page)		Remittance Letter; Design Form Order stock	Kathy K Reed M		Same for individual donors if Letter and Remittance Form are going to be used		
		Website: Design Form	Webmaster (?) Coordinate with Kathy K and Reed M		Same		
		Incorporate Roundup, GoFundMe, Amazonsmile	TBD		TBD		
		Incorporate Estate Elements	TBD, Stephanie?				
Other	Follow-up ('thank you')	Draft letter Logistics/tracking	TBD				
	Tax deduction		-Provide 501( c ) 3 info for donors				

## **Approval of Donor Letter**

**Agenda Item No. 10**

## DRAFT DONOR LETTER

Date  
Name  
Street  
City, State, Zip

Dear (Name)

Formed in 2007, the Laguna Niguel Military Support Committee (LNMSC) consists of 18 citizen volunteers. The Commission serves the needs of military service members and their families from three adopted units:

- **The U.S.S. Stockdale:** a guided missile destroyer home-ported in San Diego.
- **The 1<sup>st</sup> Battalion, 4<sup>th</sup> U.S. Marine Regiment:** based out of Camp Pendleton.
- **The 1<sup>st</sup> Assault Helicopter Battalion, 140<sup>th</sup> Aviation Regiment:** a Blackhawk Combat Helicopter Battalion home based at the Joint Forces Training Base in Los Alamitos.

The Committee volunteers work closely with command-appointed liaisons from our adopted units to determine and address the needs of men and women of the United States Armed Forces.

The LNMSC conducts a variety of fundraising activities that, amongst many things, enables us to:

- Send care packages to deployed units.
- Collect and assemble baby gifts to expectant mothers.
- Assist with travel expenses when service members are injured or deceased.
- Create welcome home packages including linens, basic toiletries, and snacks.
- Provide funds for special medical and/or educational needs.

A 501(c)(3) non-profit corporation, our activities fully rely on generous donations of time, goods, and money.

**Please help our service members and their families with a donation today.**

With Gratitude,

Sandy Rains  
Co-Chair/Council Member

Rischi Paul Sharma  
Co-Chair/Council Member

# SAMPLE REMITTANCE ENVELOPE

GLUE AREA - ANYTHING PRINTED IN THIS AREA MAY BE DESTROYED WHEN OPENED.

**PERSONAL INFORMATION:**

(please circle one) Mr. Mrs. Ms. Miss Rev. Dr.

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

**PREFERENCES:**

- I/we prefer to pay by check. My/our first payment is enclosed.
- Please keep our names anonymous in Neighborhood House publications.
- Do not add me to your email newsletter list.
- I would like to receive regular mailings.

**THIS GIFT IS MADE:**

- IN MEMORY OF \_\_\_\_\_
- IN HONOR OF \_\_\_\_\_
- OTHER \_\_\_\_\_

**PLEASE NOTIFY THE FOLLOWING INDIVIDUAL(S) OF MY GIFT:**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

**MONTHLY GIFT**

- \$20 00 PER MONTH
- \$40 00 PER MONTH
- \$60 00 PER MONTH
- \$80 00 PER MONTH
- \$100 00 PER MONTH

**QUARTERLY GIFT**

- \$200 00 PER QUARTER
- \$300 00 PER QUARTER
- \$400 00 PER QUARTER
- \$500 00 PER QUARTER

**ANY GIFT AMOUNT**

- \$ \_\_\_\_\_ PER MONTH
- \$ \_\_\_\_\_ PER QUARTER
- \$ \_\_\_\_\_ PER YEAR

GLUE OVERLAP - ANYTHING PRINTED IN THIS AREA MAY BE DESTROYED WHEN OPENED.