



# AGENDA

CHINO HILLS COMMUNITY FOUNDATION  
REGULAR MEETING  
MONDAY, MARCH 17, 2025  
4:00 P.M. PUBLIC MEETING/PUBLIC HEARINGS

CIVIC CENTER, CITY COUNCIL CHAMBERS  
14000 CITY CENTER DR., CHINO HILLS, CALIFORNIA

This agenda contains a brief general description of each item to be considered. Except as otherwise provided by law, no action shall be taken on any item not appearing on the agenda unless the Chino Hills Community Foundation Board makes a determination that an emergency exists or that a need to take immediate action on the item came to the attention of the Board subsequent to the posting of the agenda. The Board Secretary has on file copies of written documentation relating to each item of business on this Agenda available for public inspection in the City of Chino Hills Community Services Department, and on the Board's website at [www.chinohillsfoundation.org/chcf-board](http://www.chinohillsfoundation.org/chcf-board). Materials related to an item on this Agenda submitted to the Chino Hills Community Foundation Board after distribution of the agenda packet are available for public inspection in the Chino Hills Community Services Department at 14000 City Center Drive, Chino Hills, CA during normal business hours.

Speaker Cards - Those persons wishing to address the Chino Hills Community Foundation Board on any matter, whether or not it appears on the agenda, are requested to complete and submit to the Board Secretary a "Request to Speak" form available at the entrance to the Chino Hills Community Room. In accordance with the Public Records Act, any information you provide on this form is available to the public. **You are not required to provide personal information in order to speak, except to the extent necessary for the Foundation Secretary to call upon you.** Comments will be limited to three minutes per speaker. Similarly, email addresses of attendees are captured by the zoom software and are subject to the Public Records Act.

Pursuant to the Executive Order, and in compliance with the Americans with Disabilities Act, if you need special assistance to participate in the Chino Hills Community Foundation Board, please contact the Community Services Department at (909) 364-2712 within 48 hours of the meeting.

**PLEASE SILENCE ALL ELECTRONIC DEVICES WHILE BOARD IS IN SESSION. Thank you.**

## FOUNDATION BOARD MEMBERS

PETER J. ROGERS, CHAIR  
CYNTHIA MORAN, VICE CHAIR  
MARY FAULHABER, SECRETARY  
PETER PIRRITANO, TREASURER

DARRIN LEE  
DELINA LEWIS  
GRACE CAPPS  
SAMANTHA JAMES-PEREZ

DARRYLL GOODMAN  
DENISE CATTERN  
KATHLEEN SMITH  
SPENCER BOGNER

DAVID KRAMER  
GLEN ANDERSON  
RICK SHIBA  
SYLVIA NASH

## **4:00 P.M. – CALL TO ORDER/ROLL CALL**

### **PLEDGE OF ALLEGIANCE TO THE FLAG**

1. **PUBLIC COMMENTS:** At this time members of the public may address the Board Members regarding any items within the subject matter jurisdiction of the Board, whether or not the item appears on the agenda, except testimony on Public Hearing items must be provided during those hearings. Please complete and submit to the Foundation Secretary a "Request to Speak" card. Comments will be limited to three minutes per speaker.

## **FOUNDATION DEPARTMENT BUSINESS**

**CONSENT CALENDAR (3 ITEMS)** – *All matters listed on the Consent Calendar are considered routine by the Foundation Board and may be enacted by one motion in the form listed below. There will be no separate discussion of these items unless, before the Foundation Board votes on the motion to adopt, Members of the Foundation Board or staff request the matter to be removed from the Consent Calendar for separate action. Removed consent items will be discussed immediately after the adoption of the balance of the Consent Calendar.*

2. Approve November 18, 2024, Foundation Meeting Minutes.
3. Receive and file Quarterly Investment Report as of December 31, 2024.
4. Receive and file Preliminary Financial Report as of February 28, 2025.

**DISCUSSION CALENDAR** – *This portion of the Foundation Agenda is for all matters where staff and public participation is anticipated. Please complete and submit a speaker card to the Foundation Secretary. Comments will be limited to three minutes per speaker.*

5. Open nomination process for executive board positions.
6. Review and provide direction on proposed FY 25-26 budget.
7. Discuss Donor Recognition Policy.
8. Discuss moving the regular meeting date of May 19, 2025, due to conflict with the Chino Valley Unified School District High School Graduations to May 12, 2025, and review calendar.
9. Discuss Foundation funding for future community projects.

## **COMMITTEE REPORTS**

Chair Rogers

- Executive Committee
- Board Development Committee
- Wine Walk Subcommittee

Treasurer Peter Pirritano

- Finance & Investment Committee
- Fund Development Committee

Board Member Denise Cattern

- Public Affairs Committee

Board Member Glen Anderson

- chARTS

Board Member Grace Capps

- Strategic Committee

Secretary Mary Faulhaber

- Volunteer Committee

## **BOARD COMMENTS**

## **ADJOURNMENT**

# MINUTES

## CHINO HILLS COMMUNITY FOUNDATION

NOVEMBER 18, 2024  
REGULAR MEETING

CHINO HILLS, CALIFORNIA

Board Chair Rogers called the Chino Hills Community Foundation Meeting to order at 4:02 p.m.

PRESENT: BOARD MEMBERS: PETER ROGERS  
GLEN ANDERSON  
SPENCER BOGNER  
GRACE CAPPS  
SAMANTHA JAMES-PEREZ  
DARRIN LEE  
SYLVIA NASH  
PETER PIRRITANO  
RICK SHIBA  
KATHLEEN SMITH

ABSENT: BOARD MEMBERS: CYNTHIA MORAN  
DENISE CATTERN  
MARY FAULHABER  
DARRYLL GOODMAN  
DAVID KRAMER  
DELINIA LEWIS

ALSO PRESENT: JONATHAN MARSHALL, COMMUNITY SERVICES DIRECTOR  
MELISSA ARMIT, COMMUNITY SERVICES MANAGER  
MARLENE SIU, FOUNDATION SECRETARY

### PLEDGE OF ALLEGIANCE TO THE FLAG

Led by Board Chair Rogers.

### PUBLIC COMMENTS

None.

### FOUNDATION DEPARTMENT BUSINESS

#### CONSENT CALENDAR

Board Chair Rogers announced the consent calendar and asked the Board if there were any items to pull.

A motion was made by Board Member Nash and seconded by Board Member James-Perez, to approve the Consent Calendar items, as presented:

### MINUTES

The Board members approved the September 16, 2024, Chino Hills Community Foundation Meeting Minutes, as presented.

**QUARTERLY INVESTMENT REPORT**

The Board members received and filed the Quarterly Investment Report as of September 30, 2024, as presented.

**PRELIMINARY FINANCIAL REPORT**

The Board members received and filed the Quarterly Investment Report as of October 31, 2024, as presented.

**APPROVE FY 23-24 REPORT**

The Board members approved the FY 23-24 Audit Report, as presented.

**APPROVE RE\_APPOINTMENT OF BOARD MEMBERS CYNTHIA MORAN AND PETER ROGERS FOR A TERM ENDING DECEMBER 31, 2028, TO THE CHINO HILLS CITY COUNCIL**

The Board members approved the re-appointment of Board Members Cynthia Moran and Peter Rogers, for a term ending December 31, 2028, to the Chino Hills Community Foundation.

Motion carried as follows:

AYES: BOARD MEMBERS: ROGERS, ANDERSON, BOGNER, CAPPS, JAMES-PEREZ, LEE, NASH, PIRRITANO, SHIBA, SMITH.

NOES: BOARD MEMBERS: NONE.

ABSENT: BOARD MEMBERS: MORAN, CATTERN, FAULHABER, GOODMAN, KRAMER, LEWIS.

ABSTAIN: BOARD MEMBERS: NONE.

**DISCUSSION CALENDAR**

**DISCUSS A DONATION TO THE CITY OF CHINO HILLS FOR THE BILL HUGHES ARENA SIGN AND DEDICATION PLAQUE IN THE AMOUNT OF \$2,500 AND APPROVE A BUDGET AMENDMENT IN THE AMOUNT OF \$2,500 FOR A DONATION TO THE CITY OF CHINO HILLS**

Community Services Manager Armit briefed the Board on the background of the decision to rename the main horseshow arena at the McCoy Equestrian and Recreation Center, after the late Board Member, William "Bill" Hughes. She stated staff are asking for the Foundation to make a donation to fund the signage and dedication plaque.

Board Member James-Perez questioned if she must abstain from voting to approve the donation, as she is also on the Parks and Recreation Commission. Staff responded there

is no conflict of interest. Discussion ensued and the Board agreed it was appropriate to donate towards the memoriam.

A motion was made by Board Member Nash and seconded by Board Member Smith, to approve the donation to the City of Chino Hills for the Bill Hughes Arena in the amount of \$2,500 and approve a budget amendment in the amount of \$2,500 for a donation to the City of Chino Hills, as presented. Community Services Manager Armit added as updates occur, staff will keep Board Members up to date, including when the unveiling ceremony takes place.

Motion carried as follows:

AYES: BOARD MEMBERS: ROGERS, ANDERSON, BOGNER, CAPPS, JAMES-PEREZ, LEE, NASH, PIRRITANO, SHIBA, SMITH.

NOES: BOARD MEMBERS: NONE.

ABSENT: BOARD MEMBERS: MORAN, CATTERN, FAULHABER, GOODMAN, KRAMER, LEWIS.

ABSTAIN: BOARD MEMBERS: NONE.

## **REVIEW CALENDAR**

Board Chair Rogers announced the annual calendar and asked if the Board noticed any conflicts. Board Member Bogner pointed out that Martin Luther King Junior Day for 2026 also fell on the planned meeting date for January's Board meeting. After some discussion, Secretary Siu stated a staff report could be added to permanently move the January meeting to the second Monday of every month, instead of the third, to avoid the meeting falling on the same day as the holiday, in the future.

## **COMMITTEE REPORTS**

### **Board Chair Rogers**

- EXECUTIVE COMMITTEE – Board Chair Rogers reported that the Executive Committee previously met to discuss future ideas for fundraising events. Board Member Capps added that discussion included the donor policy, retention, and ways of reaching out to potential and existing donors. She added they also discussed ways to publicize the Foundation and event/program goals. She recommended the Board reach out to the Board Committees to brainstorm and develop planning ideas for achieving the Board's goals.
- WINE WALK COMMITTEE – Board Chair Rogers announced that the Wine Walk Event was a great success, with approximately 1,450 tickets sold and a profit of \$159,000, which is an increase from the previous years. He stated that less people were going into the individual stores for tastings, except for the stores near the

main areas of the event. He thanked all volunteers for their assistance, and all Board members agreed that the event was successful.

### **Board Member Glen Anderson**

- **chARTS COMMITTEE –**
  - Concert Series – Board Member Anderson stated it was a great success. Profits were generated for the artist and the Foundation. He thanked Marianne Napoles for her advertisement in the Chino Valley Champion newspaper, which contributed to the successful attendance. He added the new concert dates will be set soon for the coming year. Board Member Lee asked if a donation was received from Graze Craze for proceeds from the Andy Vargas concert. Community Services Manager Armit confirmed that a donation was received, and she will later update the Board on the amount of the donation.
  - Art Gallery – Board Member Anderson informed the Board the Gallery is doing great. He thanked all the volunteers for their contribution to the success of the gallery. Board Member James-Perez added the art gallery is making good connections with other organizations. She recently made contact for collaboration at the gallery with a member from Artists in the Alley, a group from the City of Pomona’s Art District, and they will feature some of the groups’ art in the gallery. She informed the Board she also met with a contact from a non-profit Punk Rock Gives Back, and they will hold an auction for autographed Christmas Ornaments by popular punk rock singers. Proceeds will be donated to the Foundation. She informed the Board she recently received a \$500 donation from a member of the 55+ Club, for community artist Sharon Stuewe’s gingerbread house, from her The Art of Gingerbread Making event. She concluded the gallery recently held a movie screening event, attended by a local filmmaker, which proved to be a successful feature at the gallery.
  - Kids Art – Board Member Anderson stated the artists will be informed in the next two weeks, asking them to schedule dates for the upcoming Kids Art date events.

### **Board Member Capps**

- **FUND DEVELOPMENT COMMITTEE –** Board Member Capps highlighted that Fund Development Meeting will take place in January. She asked Board Members to think of new ideas that may require additional budget, and bring those ideas to the next meeting, so that they be incorporated into the budget for FY 2025-26.

### **Board Secretary Faulhaber**

- **VOLUNTEER COMMITTEE –** Board Chair Rogers commended Secretary Faulhaber for securing volunteers for this year’s Wine Walk event. Board Member

James-Perez questioned if a time and location has been set for this year's Volunteer Dinner. Board Chair Rogers responded it will be at the same time as previous years, around 6 p/m., and held at the McCoy Equestrian and Recreation Center. He added Save the Dates will be sent out shortly.

## **BOARD COMMENTS**

**Shiba:** Board Member Shiba wished everyone a Happy Thanksgiving.

**Pirritano:** Board Member Pirritano stated this year's Wine Walk event was a great success.

**James-Perez:** Board Member James-Perez wished everyone a Happy Holidays.

**Anderson:** Board Member Anderson commended Community Services staff for their wonderful service.

**Bogner:** Board Member Bogner praised Board Member Capps on her Executive Committee goals summary.

## **ADJOURNMENT**

Board Chair Rogers adjourned the meeting at 4:43 p.m.

Respectfully submitted by:

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Marlene Siu, Senior Administrative Assistant  
Community Services Department, City of Chino Hills





Date: 03-17-25  
Item No: 03

# City of Chino Hills

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## MEMORANDUM

**DATE:** JANUARY 27, 2025

**TO:** BOARD OF DIRECTORS  
CHINO HILLS COMMUNITY FOUNDATION

**VIA:** JONATHAN MARSHALL  
COMMUNITY SERVICES DIRECTOR

**FROM:** CHRISTA BUHAGIAR, INVESTMENT TRUSTEE *CB*

**SUBJECT:** QUARTERLY INVESTMENT TRUSTEE REPORT

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To comply with the Bylaws of the Chino Hills Community Foundation, attached is the Quarterly Investment Trustee Report for the quarter ended December 31, 2024.

In the event you have any questions, please feel free to contact Nicole Lugotoff, Accounting Supervisor, at (909) 364-2648.

CB:NL:lm

Attachment

cc: Melissa Armit, Community Services Manager

**Chino Hills Community Foundation  
Quarterly Investment Trustee Report  
For the Quarter Ending December 31, 2024**

Description	Cost Value	Market Value	% Yield Earned
<b>Cash and Cash Equivalents</b>			
Citizens Business Bank - Checking Account	\$ 73,386	\$ 73,386	0.02%
LAIF	921,294	920,946	4.43%
Petty Cash	300	300	N/A
Total Funds Held by Foundation	<u>\$ 994,980</u>	<u>\$ 994,632</u>	

<b>Blended Yield of Cash and Investments</b>	<b>4.11%</b>
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<b>Benchmarks:</b>	
LAIF	4.43%
6mo U.S. Treasury	4.24%
2yr U.S. Treasury	4.25%
5yr U.S. Treasury	4.38%

In accordance with the Bylaws of the Chino Hills Community Foundation Article XI, Section 1, the Investment Trustee shall render an accounting of the investment transactions concerning the Foundation to the Board of Directors at least quarterly.



\_\_\_\_\_  
Christina Buhagiar  
Investment Trustee

**Chino Hills Community Foundation**  
**Statement of Revenues, Expenditures and Changes in Fund Balances**  
**December 31, 2024**

		<u>Fiscal Year</u> <u>24/25</u>
Revenues:		
Interest income	\$	9,391
Other revenues		3,702
Donations		86,850
Ticket sales		115,185
Fair Market value		2,776
Total Revenues	\$	<u>217,904</u>
Expenditures:		
Computer services	\$	1,623
Contractual services		4,100
Financial services		564
Liability insurance		6,337
Printing and photocopy services		2,413
Special parts and supplies		13,294
Equipment rental		25,950
Total Expenditures	\$	<u>54,281</u>
Excess of revenues over (under) expenditures	\$	<u>163,623</u>
Fund Balances:		
Beginning of fiscal year	\$	831,357
Excess of revenues over (under) expenditures		163,623
End of fiscal year	\$	<u>994,980</u>



C. The Howard and Nikki Applebaum Foundation – In December 2019, the Applebaum Foundation donated \$3,000 for special needs programs.

Permanently Restricted:

At the May 22, 2023, board meeting, the board voted to dissolve the Endowment Fund. They voted to transfer \$100,764 to the Unrestricted Fund and donated \$25,000 to the City of Chino Hills for the All-Inclusive Crossroads Park project. The permanently restricted balance as of February 28, 2025, is \$47,142.

**CHINO HILLS COMMUNITY FOUNDATION**  
**Statement of Activities**  
**As of February 28, 2025**

	Adopted Budget	Amended Budget	Actuals					Total	Variance
			Unrestricted	Community Center Fund Temporarily Restricted	Cultural Arts Committee Temporarily Restricted	Special Needs Temporarily Restricted	Endowment Fund Permanently Restricted		
Operating Revenue:									
Contributions:									
Donations	\$ 75,000	\$ 75,000	\$ 85,950	\$ -	\$ 3,500	\$ -	\$ -	\$ 89,450	\$ 14,450
Special Events	91,250	91,250	105,575	-	13,683	-	-	119,258	28,008
Interest Income	-	-	22,861	-	-	-	-	22,861	22,861
Total Operating Revenue	<u>166,250</u>	<u>166,250</u>	<u>214,386</u>	<u>-</u>	<u>17,183</u>	<u>-</u>	<u>-</u>	<u>231,570</u>	<u>65,320</u>
Operating Expenses:									
Program Services:									
Adopt-A-Family Program	2,400	2,400	1,459	-	-	-	-	1,459	(941)
Summer Day Camps	17,200	17,200	-	-	-	-	-	-	(17,200)
Utility Box Art Program	10,000	20,000	-	-	-	-	-	-	(20,000)
AED Machines	4,200	4,200	-	-	-	-	-	-	(4,200)
Chino Hills Historical Society	2,500	2,500	-	-	-	-	-	-	(2,500)
McCoy Equestrian	-	2,500	-	-	-	-	-	-	(2,500)
Total Program Expenses	<u>36,300</u>	<u>48,800</u>	<u>1,459</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>1,459</u>	<u>(47,341)</u>
Supporting Services:									
Fundraising	60,631	60,631	38,321	-	6,280	-	-	44,600	(16,031)
Administration	17,800	18,510	12,232	-	-	-	-	12,232	(6,278)
Total Support Services	<u>78,431</u>	<u>79,141</u>	<u>50,552</u>	<u>-</u>	<u>6,280</u>	<u>-</u>	<u>-</u>	<u>56,832</u>	<u>(22,309)</u>
Total Operating Expenses	<u>114,731</u>	<u>127,941</u>	<u>52,012</u>	<u>-</u>	<u>6,280</u>	<u>-</u>	<u>-</u>	<u>58,291</u>	<u>(69,650)</u>
Changes in Net Assets	\$ 51,519	\$ 38,309	\$ 162,375	\$ -	\$ 10,904	\$ -	\$ -	\$ 173,278	\$ 134,969
Net Assets, beginning of the year	<u>811,314</u>	<u>708,514</u>	<u>733,954</u>	<u>7,127</u>	<u>40,134</u>	<u>3,000</u>	<u>47,142</u>	<u>831,357</u>	
Net Assets, end of the year	<u>\$ 862,833</u>	<u>\$ 746,823</u>	<u>\$ 896,329</u>	<u>\$ 7,127</u>	<u>\$ 51,038</u>	<u>\$ 3,000</u>	<u>\$ 47,142</u>	<u>\$ 1,004,635</u>	

**CHINO HILLS COMMUNITY FOUNDATION**  
**Statement of Functional Activities**  
**As of February 28, 2025**

	<b>PROGRAM SERVICES</b>	<b>Fundraising</b>			<b>Administration</b>	
		<b>2024</b>			<b>General</b>	
		<b>Wine Walk</b>	<b>chARTS</b>	<b>Total</b>	<b>Management</b>	<b>Total</b>
<b>Operating Revenues:</b>						
<b>Contributions:</b>						
Sales	\$ -	\$ 105,015	\$ 10,170	\$ 115,185	\$ -	\$ 115,185
Donations/Sponsorships	20,000	65,850	3,500	69,350	-	89,350
Other Revenues	100	560	3,513	4,073	-	4,173
Interest Income	22,861	-	-	-	-	22,861
	<u>42,961</u>	<u>171,425</u>	<u>17,183</u>	<u>188,608</u>	<u>-</u>	<u>231,570</u>
<b>Operating expenses:</b>						
Licenses & Permits	-	-	-	-	-	-
Memberships	-	-	-	-	450	450
Liability Insurance	-	-	-	-	6,337	6,337
Financial Services	-	480	-	480	176	657
Computer Services	-	-	-	-	1,623	1,623
Contractual Services	-	-	-	-	751	751
Advertising & Promotion	-	-	-	-	-	-
Printing Services	-	2,413	-	2,413	-	2,413
Postage	-	-	-	-	73	73
Office Supplies	-	-	-	-	-	-
Special Parts and Supplies	-	9,426	2,127	11,553	2,602	14,155
Concessions	-	-	-	-	-	-
Administrative Overhead	-	-	-	-	-	-
Entertainment	-	-	4,100	4,100	-	4,100
Catering and Refreshments	-	-	-	-	-	-
Rentals	-	25,949	-	25,949	220	26,169
Taxes	-	52	52	105	-	105
Scholarships, Grants & Awards	1,459	-	-	-	-	1,459
	<u>\$ 1,459</u>	<u>\$ 38,321</u>	<u>\$ 6,280</u>	<u>\$ 44,600</u>	<u>\$ 12,232</u>	<u>\$ 58,291</u>
<b>Changes in Net Assets</b>	<u>\$ 41,502</u>	<u>\$ 133,104</u>	<u>\$ 10,904</u>	<u>\$ 144,008</u>	<u>\$ (12,232)</u>	<u>\$ 173,278</u>

**CHINO HILLS COMMUNITY FOUNDATION**  
**Statement of Functional Activities**  
**Cultural Arts Committee**  
**As of February 28, 2025**

	Kids Art Exploration	Art Gallery	2024 Concert Series	Total
Operating Revenues:				
Contributions:				
Sales	\$ -	\$ -	\$ 10,170	\$ 10,170
Donations/Sponsorships	-	-	3,500	3,500
Advertising	-	-	-	-
Raffles & Auctions	-	-	-	-
Commission Sales	-	1,818	-	1,818
Concessions	-	-	1,695	1,695
Other	-	-	-	-
Interest Income	-	-	-	-
	<u>-</u>	<u>1,818</u>	<u>15,365</u>	<u>17,183</u>
Operating expenses:				
Licenses & Permits	-	-	-	-
Liability	-	-	-	-
Financial Services	-	-	-	-
Computer Services	-	-	-	-
Contractual Services	-	-	-	-
Advertising & Promotion	-	-	-	-
Printing Services	-	-	-	-
Postage	-	-	-	-
Office Supplies	-	-	-	-
Special Parts and Supplies	-	1,524	604	2,127
Concessions	-	-	-	-
Administrative Overhead	-	-	-	-
Entertainment	-	-	4,100	4,100
Catering and Refreshments	-	-	-	-
Rentals	-	-	-	-
Taxes	-	-	52	52
Scholarships, Grants & Awards	-	-	-	-
Donations	-	-	-	-
	<u>\$ -</u>	<u>\$ 1,524</u>	<u>\$ 4,756</u>	<u>\$ 6,280</u>
Changes in Net Assets	<u>\$ -</u>	<u>\$ 295</u>	<u>\$ 10,609</u>	<u>\$ 10,904</u>







# Administration

## Project #CHCF009

Memberships		Adopted Budget
Chino Valley Chamber of Commerce	7200-00-80-800-000000-600020	\$450.00
<b>Total</b>		<b>\$450.00</b>

Liability Insurance		Adopted Budget
Alliant Insurance	7200-00-80-800-000000-620045	\$6,645.00
<b>Total</b>		<b>\$6,645.00</b>

Financial Services		Adopted Budget
Merchant Services	7200-00-80-800-000000-610030	\$1,000.00
<b>Total</b>		<b>\$1,000.00</b>

Computer Services		Adopted Budget
Norwest Designs (website)	7200-00-80-800-000000-610010	\$3,000.00
Constant Contact	7200-00-80-800-000000-610010	\$1,000.00
DonorPerfect	7200-00-80-800-000000-610010	\$2,600.00
Go Daddy	7200-00-80-800-000000-610010	\$1,200.00
<b>Total</b>		<b>\$7,800.00</b>

Professional Services		Account Number	Adopted Budget
Tax Return	7200-00-80-800-000000-610060		\$725.00
<b>Total</b>			<b>\$725.00</b>

Special Parts & Supplies		Account Number	Adopted Budget
Board Member Shirts	7200-00-80-800-000000-620075		\$100.00
Table Linens	7200-00-80-800-000000-620075		\$350.00
<b>Total</b>			<b>\$450.00</b>

Office Supplies		Adopted Budget
General Office Supplies	7200-00-80-800-000000-620050	\$200.00
<b>Total</b>		<b>\$200.00</b>

Postage		Adopted Budget
Mailing of Checks	7200-00-80-800-000000-620055	\$100.00
<b>Total</b>		<b>\$100.00</b>

Printing		Adopted Budget
Business Cards	7200-00-80-800-000000-620060	\$100.00
<b>Total</b>		<b>\$100.00</b>

Licenses & Taxes		Adopted Budget
Attorney General (RRF-1)	7200-00-80-800-000000-650020	\$100.00
Department of Justice - Raffle Registry	7200-00-80-800-000000-650020	\$25.00
Secretary of State - Statement of Info	7200-00-80-800-000000-650020	\$25.00
<b>Total</b>		<b>\$150.00</b>

<b>Total Expenses</b>		Proposed Budget
		<b>\$17,620.00</b>

# Program Giving

Donations		Adopted Budget
Adopt A Family	7200-00-80-800-000000-700020	\$2,400.00
Summer Day Camp (15-18 Participants)	7200-00-80-800-000000-700020	\$17,160.00
Utility Box Art	7200-00-80-800-000000-700020	\$10,000.00
AED Machines (Chino Valley Fire Found)	7200-00-80-800-000000-700020	\$5,000.00
Chino Hills Historical Society	7200-00-80-800-000000-700020	\$2,500.00
<b>Total</b>		<b>\$37,060.00</b>

# Art Gallery

Project #CHCF011

Special Parts & Supplies	Account Number	Adopted Budget
Supplies	7200-00-80-800-000000-620075	\$2,500.00
<b>Total</b>		<b>\$2,500.00</b>

# Chino Hills Arts Committee (chARTS)

## Concert Series #CHCF008

2025 Concert #1  
Sept 2025

2026 Concerts #2 & 3  
April-June 2026

### Revenues

#### Ticket Sales

##### Attendance

	300

@	\$15.00
@	FREE
@	FREE
@	FREE

#### Adopted Budget

#### Adopted Budget

\$4,500.00

\$9,000.00

\$4,500.00

\$9,000.00

#### Sponsorships

##### Proposed Budget

1
1
1

Gold @	\$2,500.00
Silver @	\$1,500.00
Bronze @	\$1,000.00

#### Adopted Budget

#### Adopted Budget

\$2,500.00

\$1,500.00

\$1,000.00

\$5,000.00

\$0.00

#### Total Income

\$9,500.00

\$9,000.00

### Expenses

#### Licenses & Permits

##### Account Number

ABC License	7200-00-80-800-000000-600020
<b>Total</b>	

#### Adopted Budget

#### Adopted Budget

\$52.00

\$104.00

\$52.00

\$104.00

#### Contractual Services

##### Account Number

Entertainment	7200-00-80-800-000000-610015
Sound Equipment & Lighting	7200-00-80-800-000000-610015

#### Adopted Budget

#### Adopted Budget

\$3,500.00

\$7,000.00

\$600.00

\$1,200.00

\$4,100.00

\$8,200.00

#### Rentals

##### Account Number

Generator	7200-00-80-800-000000-630030
<b>Total</b>	

#### Adopted Budget

#### Adopted Budget

\$125.00

\$250.00

\$125.00

\$250.00

#### Printing

##### Account Number

Banner	7200-00-80-800-000000-620060
<b>Total</b>	

#### Adopted Budget

#### Adopted Budget

\$100.00

\$200.00

\$100.00

\$200.00

#### Special Parts & Supplies

##### Account Number

Concession Stand Supplies	7200-00-80-800-000000-620075
Miscellaneous Supplies	

#### Adopted Budget

#### Adopted Budget

\$200.00

\$400.00

\$100.00

\$200.00

\$300.00

\$600.00

#### Total Costs

\$4,677.00

\$9,354.00

#### Net Income (Loss)

\$4,823.00

(\$354.00)

# Kids Art Exploration

Project #CHCF005

Special Parts & Supplies	Account Number	Adopted Budget
Supplies	7200-00-80-800-000000-620075	\$500.00
<b>Total</b>		<b>\$500.00</b>

# Volunteer Reception

Project #CHCF006

Special Parts & Supplies	Account Number	Adopted Budget
Raffles: Gift Cards	7200-00-80-800-000000-620075	\$ 600
Décor	7200-00-80-800-000000-620075	\$ 200
Centerpieces	7200-00-80-800-000000-620075	\$ 100
<b>Total</b>		<b>\$ 900</b>

Contractual Services	Account Number	Adopted Budget
Catering & Refreshments	7200-00-80-800-000000-610015	\$ 1,700
Dessert	7200-00-80-800-000000-610015	\$ 300
Entertainment (performer)	7200-00-80-800-000000-610015	\$ 300
<b>Total</b>		<b>\$ 2,300</b>

Contractual Services	Account Number	Adopted Budget
<b>Total</b>		<b>\$ -</b>

Rentals	Account Number	Adopted Budget
Linens	7200-00-80-800-000000-630030	\$ 300
<b>Total</b>		<b>\$ 300</b>

Total Expenses	Adopted Budget
	<b>\$ 3,500</b>



# Wine Walk Expenses

Project #CHCF001

## Wine Walk

Wine Walk Tickets		Adopted Budget	
<b>Proposed Budget</b>			
1050	Pre-Sales @	\$75.00	\$ 78,750
25	Last Call @	\$85.00	\$ 2,125
155	VIP Package @	\$115.00	\$ 17,825
1230			
156	Sponsor/Comp @	\$0.00	\$ -
1,386			
25	DD @	\$30.00	\$ 750
			<b>\$ 99,450</b>

Sponsorships		Adopted Budget	
<b>Proposed Budget</b>			
8	Premier @	\$5,000.00	\$ 40,000
10	Vineyard @	\$2,500.00	\$ 25,000
10	Cellar @	\$1,000.00	\$ 10,000
4	Wine @	\$500.00	\$ 2,000
			<b>\$ 77,000</b>

Total Income	Adopted Budget
	<b>\$ 176,450</b>

Licenses & Permits (LICPERMS)	Account Number	Adopted Budget
ABC License	7200-00-80-800-000000-650035	\$ 100
Money order/Merchant Fees		
<b>Total</b>		<b>\$ 100</b>

Financial Services (FINSRVCS)	Account Number	Adopted Budget
Money order/Merchant Fees	7200-00-80-800-000000-610030	\$ 500
<b>Total</b>		<b>\$ 500</b>

Printing (PRINTING)	Account Number	Adopted Budget
Program	7200-00-80-800-000000-620060	\$ 700
Postcards	7200-00-80-800-000000-620060	\$ 500
Banners	7200-00-80-800-000000-620060	\$ 3,000
<b>Total</b>		<b>\$ 4,200</b>

Special Parts & Supplies (PARTS)	Quantity	Adopted Budget
Wristbands (qty = 1,000)	7200-00-80-800-000000-620075	\$ 350
Drink Tickets (qty = 12,000)	7200-00-80-800-000000-620075	\$ 350
Wine Glasses (qty = 1,620)	7200-00-80-800-000000-620075	\$ 7,000
Posterboard	7200-00-80-800-000000-620075	\$ 200
Corkscrews	7200-00-80-800-000000-620075	\$ 150

Wine Spouts	7200-00-80-800-000000-620075	\$ 150
Staff Lunch	7200-00-80-800-000000-620075	\$ 300
Wine Ice Buckets	7200-00-80-800-000000-620075	\$ 100
Wine	7200-00-80-800-000000-620075	\$ 2,500
Misc. Supplies	7200-00-80-800-000000-620075	\$ 1,000
<b>Total</b>		<b>\$ 12,100</b>

Rentals (EQUIPMENT)	Account Number	Adopted Budget
Tables/Chairs/Linens	7200-00-80-800-00000-630030	\$ 25,500
Ice & trailer rental	7200-00-80-800-00000-630030	\$ 700
<b>Total</b>		<b>\$ 26,200</b>

<b>Total Expenses</b>	Adopted Budget
	<b>\$ 43,100</b>

<b>Net Income</b>	Adopted Budget
	<b>\$ 133,350</b>





## CHINO HILLS COMMUNITY FOUNDATION Donor Recognition Policy

### **Purpose**

The purpose of this policy is to provide guidelines and establish procedures for the recognition of donations made to the Chino Hills Community Foundation (CHCF). Acknowledgement and accounting of all cash, equipment, in-kind services, or materials donated to the Foundation shall be made in accordance with the procedures in this policy.

Grants received by the Foundation in the ordinary course of business shall not be treated as donations and shall not be subject to this Policy.

### **Policy**

#### 1. Definitions

- a. Donation – A donation may consist of cash, real property (land), or in-kind contribution that is given without return consideration.
- b. In-Kind Contribution - any item or object other than cash or real property, which would serve a useful purpose in the provision of Foundation services
- c. Restricted Donation - a donation for a specified purpose indicated by the donor.
- d. Unrestricted Donation - a donation without any specific intent or purpose indicated by the donor for its use.
- e. Memorial Donations- a donation given to preserve the memory and to honor a deceased person(s) or an event that occurred in the past.
- f. Deferred Gift – A deferred gift is any charitable gift arrangement where the foundation's use of the gift is delayed to some future time. Some of these gifts may be revocable.

## 2. Donor Leaf Recognition

Donors who have contributed a cumulative total of \$5,000 or more will be recognized on the Foundation Donor Wall in the lobby of the Chino Hills Community Center. Donations will be tracked cumulatively over the donor's lifetime, beginning November 2009. Contributions made between July 1 and June 30 each year will be added to the previous year's donations, and donor recognition will be updated accordingly.

The donor wall showcases leaves of varying sizes to represent different levels of giving. If a donor moves up to a higher donation level, their existing donor leaf will be replaced with one reflecting their new level, and it will be repositioned accordingly on the tree display. New donor leaves will be purchased and displayed as donor levels change.

Recognition on the donor wall will cease if no donation has been made to the Foundation for at least five years. If a donor contributes again after this period, their recognition will be reinstated at the appropriate level, including their lifetime donation total.

### Donor Leaf Levels:

- Copper Leaf: \$5,000 to \$9,999
- Bronze Leaf: \$10,000 to \$24,999
- Silver Leaf: \$25,000 to \$49,999
- Gold Leaf: \$50,000 to \$99,999
- Platinum Leaf: \$100,000+

## 3. Gifts in-kind will be recognized as follows:

- a. The value of the Shoppes at Chino Hills hosting the Wine Walk will be valued at \$5,000. Donation will be included as part of the Donor Wall donations.
- b. Raffle, Live and Silent Auction items donated will be valued at market value at the time the donation was made. Live and silent auction donated items will be included as part of the Donor Wall donations.

## 4. Website Recognition

The Foundation will recognize donations on its website, categorized as follows:

- a. Monetary Donations: Total contributions exceeding \$5,000 will be listed on the Foundation's website.
- b. In-Kind Donations: Donations of services will be recognized as special "sponsors" and listed separately. Qualifying in-kind contributions include, but are not limited to, professional services such as legal, accounting, and consulting, as well as donated office space or free use of equipment (e.g.,

- computers). To qualify, the contributed services must either create or enhance non-financial assets or require specialized skills provided by qualified professionals (e.g., carpenters, doctors, accountants) that the Foundation would otherwise need to purchase.
- c. Recognition will cease if no donation has been made within the past five years.
5. Pledges will be recognized for their total value at the time they are made, provided the total gift will be received within a six-month period, to be approved by the Fund Development Committee.
  6. Memorial Donations may be recognized in one of two ways:
    - a. The donor may have the value of the gift added to his/her cumulative giving total, the recognition for which will be in his/her name.
    - OR
    - b. The donor may request that the gift be recognized “In Memory of” the deceased.
    - c. “In Honor of” Donors may request that their donations be recognized “in honor of” another individual, organization or event.
  7. Restricted donations may be made to the Foundation in cash or by in-kind contributions for specific purposes. The Board shall review the conditions of the restrictive donations and determine if the benefits derived from the donation warrant its acceptance.
    - a. Restricted funds may only be spent for the purpose to which they are designated.
    - b. If at any time the Foundation accepts custody of designated funds and does not intend to use the funds for the purposes designated, the Foundation shall return the monies to the donor.
    - c. Restricted donations of cash or in-kind contributions under \$10,000 may be accepted by the Foundation Chair.
    - d. Restricted donations of cash or in-kind contributions in the amount of \$10,000 or above shall be presented to the Board for acceptance.
  8. Donors’ requests to remain anonymous will be honored
  9. Deferred Gifts
    - a. Charitable Bequest – This is a deferred revocable gift made through a will. It can include cash, real estate, securities, and retirement plan accumulations. Donors that inform the Foundation of their bequest intentions will be recognized at the time of death and will receive recognition at the appropriate level.
    - b. Charitable Remainder Trust – This is an irrevocable deferred gift. The donor transfers assets to a trust that names the Foundation as the remainder

- beneficiary. The donor or someone named by the donor is the income beneficiary of the trust for life or a specific term. The donor will receive a receipt calculated on present value of the gift at the time of transfer. The donor will be recognized at the time of death of the donor and will receive recognition at the actual remainder amount.
- c. Gift of Residual Interest – This is an irrevocable deferred gift. The donor transfers ownership of personal property to the Foundation but continues to use the property during his or her lifetime. The donor receives a receipt for the present value of the property at the time of transfer. The donor will be recognized at the time of death and the donor will receive recognition at the actual residual amount received by the Foundation.
  - d. Life Insurance (New: Charity is the beneficiary only) – This is a deferred gift. A donor informs the Foundation that they have been named beneficiary only of a new life insurance policy. The donor pays premiums annually and no receipts are produced. When the donor dies, the charity receives the death benefit, a tax receipt is produced for this amount, and the donor is recognized for the amount received.
  - e. Life Insurance (New: Charity is the owner and beneficiary) – This is a deferred gift. A donor pays premiums annually for which receipts are given. When the donor dies, the charity receives the death benefit. No tax receipt is produced for this amount. The donor will not be recognized for premiums paid. At death the donor will receive recognition at appropriate level.
  - f. RRSP/RRIF – This is a revocable deferred gift. The donor names the charity as beneficiary and the balance remaining at the donor's death is paid to the charity. The donor's estate receives a tax receipt for that amount. Donors that inform the Foundation of their beneficiary designation will be recognized at death and will receive naming recognition for amount received.
  - g. Strip Bonds – This is an irrevocable deferred gift. The donor contributes strip bonds that have a maturity date. The Foundation provides the donor with a receipt for the current value of the bonds. Upon maturity of the bonds the donor will be recognized for the maturity value of the bonds.

#### 10. Charitable Gift Annuity

The donor contributes an amount to the Foundation that in turn uses a portion to purchase an annuity from a life insurance company and keeps the remaining amount as a gift. A tax receipt is issued for a portion of the gift amount. The donor will be recognized for the actual net amount received by the Foundation. In some instances, the donor may subscribe to an annuity that requires payments be made for a number of years and names the Foundation as beneficiary. In these instances, the donor at death, will receive naming recognition for any additional amounts received.



## CHINO HILLS COMMUNITY FOUNDATION Donor Recognition Policy

### **Purpose**

The purpose of this policy is to provide guidelines and establish procedures for the recognition of donations made to the Chino Hills Community Foundation (CHCF). Acknowledgement and accounting of all cash, equipment, in-kind services, or materials donated to the Foundation shall be made in accordance with the procedures in this policy.

Grants received by the Foundation in the ordinary course of business shall not be treated as donations and shall not be subject to this Policy.

### **Policy**

#### 1. Definitions

- a. Donation – A donation may consist of cash, real property (land), or in-kind contribution that is given without return consideration.
- b. In-Kind Contribution - any item or object other than cash or real property, which would serve a useful purpose in the provision of Foundation services
- c. Restricted Donation - a donation for a specified purpose indicated by the donor.
- d. Unrestricted Donation - a donation without any specific intent or purpose indicated by the donor for its use.
- e. Memorial Donations- a donation given to preserve the memory and to honor a deceased person(s) or an event that occurred in the past.
- f. Deferred Gift – A deferred gift is any charitable gift arrangement where the foundation's use of the gift is delayed to some future time. Some of these gifts may be revocable.



## CHINO HILLS COMMUNITY FOUNDATION

Donor Recognition Policy

Date Amended: ~~November 9, 2020~~

March 17, 2025

### 2. Donor Leaf Recognition

Donors who have contributed a cumulative total of \$5,000 or more will be recognized on the Foundation Donor Wall in the lobby of the Chino Hills Community Center. Donations will be tracked cumulatively over the donor's lifetime, beginning November 4, 2009. Contributions made between July 1 and June 30 each year will be added to the previous year's donations, and donor recognition will be updated accordingly.

The donor wall showcases leaves of varying sizes to represent different levels of giving. If a donor moves up to a higher donation level, their existing donor leaf will be replaced with one reflecting their new level, and it will be repositioned accordingly on the tree display. New donor leaves will be purchased and displayed as donor levels change.

Recognition on the donor wall will cease if no donation has been made to the Foundation for at least five years. If a donor contributes again after this period, their recognition will be reinstated at the appropriate level, including their lifetime donation total.

#### Donor Leaf Levels:

- Copper Leaf – \$5,000 to \$9,999
- Bronze Leaf – \$10,000 to \$24,999
- Silver Leaf – \$25,000 to \$49,999
- Gold Leaf – \$50,000 to \$99,999
- Platinum Leaf – \$100,000+

~~2. Donations will be cumulative over the lifetime of the donor; starting with November 4, 2009. Recognition of a donor will be permanent. Donations from July 1 through June 30 of every year will be calculated and added to previous years' donations and reflected on the Donor Tree located in the lobby of the Community Center. The donor tree has leaves of different sizes to reflect the various levels of donations. New donor leaves will be purchased and displayed on the donor wall to reflect any changes in donor levels.~~

~~3.—~~

~~4. The levels of major **annual** giving and recognition are as follows:~~

- ~~— "Platinum Friend" \$20,000 – \$99,999~~
- ~~— Invitation to Donor Recognition (10 guests)~~
- ~~— 6 tickets to Home Tour\*~~
- ~~— 4 Music Event Tickets~~
- ~~— 10 VIP tickets to Wine Walk\*~~

**CHINO HILLS COMMUNITY FOUNDATION**

Donor Recognition Policy

Date Amended: ~~November 9, 2020~~

March 17, 2025

~~Individual or company name displayed on all advertising materials including event programs.~~

~~Exclusive 2' x 4' banner at Foundation events depicting sponsorship level~~

~~Recognition on the Chino Hill Community Foundation website, quarterly City of Chino Hills Recreation Guide & City News~~

~~Recognition on the Donor Wall at the Chino Hills Community Center~~

~~"Gold Friend" \$10,000 - \$19,999~~

~~Invitation to Donor Recognition (6 guests)~~

~~5 tickets to Home Tour\*~~

~~3 Music event tickets~~

~~8 VIP tickets to Wine Walk\*~~

~~Individual or company name displayed on all advertising materials including event programs.~~

~~Recognition on the City of Chino Hills Community Foundation website, quarterly City of Chino Hills Recreation Guide & City News~~

~~Recognition on the Donor Wall at the Chino Hills Community Center~~

~~"Silver Friend" \$5,000 - \$9,999~~

~~Invitation to Donor Recognition (4 guests)~~

~~4 tickets to Home Tour\*~~

~~2 Music event tickets~~

~~8 VIP tickets to Wine Walk\*~~

~~Recognition on the Chino Hills Community Foundation website, quarterly City of Chino Hills Recreation Guide & City News.~~

~~Recognition on the Donor Wall at the Chino Hills Community Center~~

~~"Bronze Friend" \$2,500 - \$4,999~~

~~Invitation to Donor Recognition (2 guests)~~

~~Choice of 4 tickets to Home Tour\* or 4 VIP tickets Wine Walk\* and 2 music event tickets~~

~~Recognition in the quarterly City of Chino Hills Recreation Guide & City News~~

~~Recognition on the Donor Wall at the Chino Hills Community Center~~

~~"Copper Friend" \$1,000 - \$2,499~~

~~Invitation to Donor Recognition (2 guests)~~

~~Choice of 2 tickets to Home Tour\* or 2 VIP tickets to Wine Walk\*~~

~~Recognition in the quarterly City of Chino Hills Recreation Guide & City News~~

~~Recognition on the Donor Wall at the Chino Hills Community Center~~

~~\*Events may be subject to change, similar value for new event will be honored.~~

## CHINO HILLS COMMUNITY FOUNDATION

Donor Recognition Policy

Date Amended: ~~November 9, 2020~~

March 17, 2025

~~5. Unrestricted cash gifts will be recognized as outlined above.~~

~~6.3. Gifts in-kind will be recognized as follows:~~

~~a. Home Tour\*~~

~~i. The value of the Homeowner “donating” the use of their home for the event will be estimated at \$1,000. Homeowners will receive an invitation to the donor’s reception, but their donation will not be counted as part of the Donor Wall’s annual donations.~~

~~ii. Event sponsorships will be included as part of the Donor Wall’s donation.~~

~~iii. Raffle, Live and Silent Auction items will be valued at market value at the time the donation was made. Live and Silent Auction donations will be included as part of the Donor Wall donations.~~

~~b. Wine for Wine Walk\*~~

~~i. a. The value of the Shoppes @ Chino Hills hosting the Wine Walk will be valued at \$~~5,000~~2,500. Donation will be included as part of the Donor Wall donations.~~

~~ii. Event sponsorships will be included as part of the Donor Wall’s donation.~~

~~iii. b. Raffle, Live and Silent Auction items donated will be valued at market value at the time the donation was made. Live and silent auction donated items will be included as part of the Donor Wall donations.~~

~~7. Donation of services will be recognized as special “sponsors” and listed on the Foundation’s website. Donated services include, but not limited to, legal, accounting, and other professional services, donating office space, donating free use of equipment such as computers. To be recognized, the contributed services must create or enhance nonfinancial assets or require specialized skills, are provided by individuals possessing those skills (e.g. carpenters, doctors, and accountants) and would typically need to be purchased if not provided by donation.~~

~~4. Website Recognition~~

~~The Foundation will recognize donations on its website, categorized as follows:~~

~~a. Monetary Donations: Total contributions exceeding \$5,000 will be listed on the Foundation’s website.~~

~~b. In-Kind Donations: Donations of services will be recognized as special “sponsors” and listed separately. Qualifying in-kind contributions include, but are not limited to, professional services such as legal, accounting, and consulting, as well as donated office space or free use of equipment (e.g., computers). To qualify, the contributed services must either create or enhance non-financial assets or require specialized skills provided by qualified professionals (e.g., carpenters, doctors, accountants) that the Foundation would otherwise need to purchase.~~

**CHINO HILLS COMMUNITY FOUNDATION**

Donor Recognition Policy

Date Amended: ~~November 9, 2020~~

March 17, 2025

c. Recognition will cease if no donation has been made within the past five years.

~~8-5.~~ Pledges will be recognized for their total value at the time they are made, provided the total gift will be received within a six month period, to be approved by the Fund Development Committee.

~~9-6.~~ Memorial Donations may be recognized in one of two ways:

a. The donor may have the value of the gift added to his/her cumulative giving total, the recognition for which will be in his/her name.

OR

b. The donor may request that the gift be recognized "In Memory of" the deceased.

c. "In Honor of" Donors may request that their donations be recognized "in honor of" another individual, organization or event.

~~10-7.~~ Restricted donations may be made to the Foundation in cash or by in-kind contributions for specific purposes. The Board shall review the conditions of the restrictive donations and determine if the benefits derived from the donation warrant its acceptance.

a. Restricted funds may only be spent for the purpose to which they are designated.

b. If at any time the Foundation accepts custody of designated funds and does not intend to use the funds for the purposes designated, the Foundation shall return the monies to the donor.

c. Restricted donations of cash or in-kind contributions under \$10,000 may be accepted by the Foundation Chair.

d. Restricted donations of cash or in-kind contributions in the amount of \$10,000 or above shall be presented to the Board for acceptance.

~~11-8.~~ Donors' requests to remain anonymous will be honored

~~12-9.~~ Deferred Gifts

a. Charitable Bequest – This is a deferred revocable gift made through a will. It can include cash, real estate, securities, and retirement plan accumulations. Donors that inform the Foundation of their bequest intentions will be

## CHINO HILLS COMMUNITY FOUNDATION

Donor Recognition Policy

Date Amended: ~~November 9, 2020~~

March 17, 2025

- recognized at the time of death and will receive recognition at the appropriate level.
- b. Charitable Remainder Trust – This is an irrevocable deferred gift. The donor transfers assets to a trust that names the Foundation as the remainder beneficiary. The donor or someone named by the donor is the income beneficiary of the trust for life or a specific term. The donor will receive a receipt calculated on present value of the gift at the time of transfer. The donor will be recognized at the time of death of the donor and will receive recognition at the actual remainder amount.
  - c. Gift of Residual Interest – This is an irrevocable deferred gift. The donor transfers ownership of personal property to the Foundation but continues to use the property during his or her lifetime. The donor receives a receipt for the present value of the property at the time of transfer. The donor will be recognized at the time of death and the donor will receive recognition at the actual residual amount received by the Foundation.
  - d. Life Insurance (New: Charity is the beneficiary only) – This is a deferred gift. A donor informs the Friends that they have been named beneficiary only of a new life insurance policy. The donor pays premiums annually and no receipts are produced. When the donor dies, the charity receives the death benefit, a tax receipt is produced for this amount, and the donor is recognized for the amount received.
  - e. Life Insurance (New: Charity is the owner and beneficiary) – This is a deferred gift. A donor pays premiums annually for which receipts are given. When the donor dies, the charity receives the death benefit. No tax receipt is produced for this amount. The donor will not be recognized for premiums paid. At death the donor will receive recognition at appropriate level.
  - f. RRSP/RRIF – This is a revocable deferred gift. The donor names the charity as beneficiary and the balance remaining at the donor's death is paid to the charity. The donor's estate receives a tax receipt for that amount. Donors that inform the Foundation of their beneficiary designation will be recognized at death and will receive naming recognition for amount received.
  - g. Strip Bonds – This is an irrevocable deferred gift. The donor contributes strip bonds that have a maturity date. The Foundation provides the donor with a receipt for the current value of the bonds. Upon maturity of the bonds the donor will be recognized for the maturity value of the bonds.

### 13-10. Charitable Gift Annuity

The donor contributes an amount to the Foundation that in turn uses a portion to purchase an annuity from a life insurance company and keeps the remaining amount as a gift. A tax receipt is issued for a portion of the gift amount. The donor will be recognized for the actual net amount received by the Foundation. In some instances the donor may subscribe to an annuity that requires payments be made for a number of years and names the Foundation as beneficiary. In

**CHINO HILLS COMMUNITY FOUNDATION**

Donor Recognition Policy

Date Amended: ~~November 9, 2020~~

March 17, 2025

these instances the donor at death, will receive naming recognition for any additional amounts received.

CHINO HILLS COMMUNITY FOUNDATION  
THREE YEAR EVENT PLANNING SCHEDULE

\*\*\* Dates should be scheduled at least 6 months in advance \*\*\*

Dec			
	2025	2026	2027
JANUARY	TBD Volunteer Reception - Send Invitations 13 Board Meeting <b>CANCELLED</b>	TBD Volunteer Reception - Send Invitations 19 Board Meeting (conflict with MLK)	TBD Volunteer Reception - Send Invitations 18 Board Meeting (conflict with MLK)
FEBRUARY	8 Summer Rec Guide DEADLINE 3 Volunteer Recognition 6 Concert Series #1: Tickets on Sale	TBD Summer Rec Guide DEADLINE 2 Volunteer Recognition TBD Concert Series #1: Tickets on Sale	TBD Summer Rec Guide DEADLINE 1 Volunteer Recognition TBD Concert Series #1: Tickets on Sale
MARCH	17 Board Meeting 22 Kids Art Exploration 10 Wine Walk Vendor/Sponsors Live	16 Board Meeting TBD Kids Art Exploration TBD Concert Series #1: TBD	15 Board Meeting TBD Kids Art Exploration TBD Concert Series #1: TBD
APRIL	5 Concert Series #1: Derek Bordeaux 10 Concert Series #2: Tickets on Sale		
MAY	1 Wine Walk Planning Begins 8 Art Show #1: Fawn Whitten 19 Board Meeting 27 Wine Walk Webpage LIVE 28 Fall Rec Guide DEADLINE	1 Wine Walk Planning Begins 18 Board Meeting TBD Concert Series #2 - TBD TBD Wine Walk Webpage LIVE TBD Fall Rec Guide DEADLINE	1 Wine Walk Planning Begins 17 Board Meeting TBD Concert Series #2 - TBD TBD Wine Walk Webpage LIVE TBD Fall Rec Guide DEADLINE
JUNE	6 Concert Series #2: TBD	TBD Art Show #1	TBD Art Show #1
JULY	17 Concert Series #3: Tickets on Sale 21 Board Meeting 30 Wine Walk Tickets on Sale	20 Board Meeting TBD Art Show #1	19 Board Meeting TBD Art Show #1
AUGUST	14 Art Show #2: TBD 28 Winter Rec Guide DEADLINE	1 Wine Walk Tickets on Sale TBD Concert Series #3 - TBD TBD Art Show #2 TBD Winter Rec Guide DEADLINE	1 Wine Walk Tickets on Sale TBD Concert Series #3 - TBD TBD Art Show #2 TBD Winter Rec Guide DEADLINE
SEPT.	13 Concert Series #3 - Andy Vargas 15 Board Meeting	21 Board Meeting TBD Art Show #2	20 Board Meeting TBD Art Show #2
OCT.	11 Chino Hills Wine Walk	10 Chino Hills Wine Walk TBD Art Show #2	9 Chino Hills Wine Walk TBD Art Show #2
NOVEMBER	TBD Concert Series Planning Begins 17 Board Meeting 23 Spring Rec Guide (Feb -May) DEADLINE	TBD Concert Series Planning Begins 16 Board Meeting TBD Spring Rec Guide (Feb -May) DEADLINE	TBD Concert Series Planning Begins 15 Board Meeting TBD Spring Rec Guide (Feb -May) DEADLINE
DECEMBER	TBD Volunteer Reception - Save the Date TBD Concert Series webpage LIVE	TBD Volunteer Reception - Save the Date TBD Concert Series webpage LIVE	TBD Volunteer Reception - Save the Date TBD Concert Series webpage LIVE