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Form 990

Return of Organization Exempt From Income Tax

OMB No 1545-0047

2016

Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public

Information about Form 990 and its instructions is at [www.irs.gov/form990](#)

A For the 2016 calendar year, or tax year beginning 01-01-2016 , and ending 12-31-2016

B Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Final

☒ Return/terminated

☐ Amended return

☐ Application pending

C Name of organization

THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY

Doing business as

Number and street (or P O box if mail is not delivered to street address)

550 DANA STREET

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

SAN LUIS OBISPO, CA 93401

F Name and address of principal officer

HEIDI MCPHERSON

550 DANA STREET

SAN LUIS OBISPO, CA 93401

H(a) Is this a group return for subordinates?

☐ Yes ☒ No

H(b) Are all subordinates included?

☐ Yes ☐ No

If "No," attach a list (see instructions)

H(c) Group exemption number ▶

D Employer identification number

77-0496500

E Telephone number

(805) 543-2323

G Gross receipts \$ 24,387,385

I Tax-exempt status

☒ 501(c)(3) ☐ 501(c) () ◀(insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ WWW.CFSLOCO.ORG

K Form of organization

☒ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation 1998

M State of legal domicile CA

Part I Summary

1 Briefly describe the organization's mission or most significant activities

SEE SCHEDULE O TO PROVIDE LEADERSHIP AND TO ENCOURAGE CHARITABLE GIVING FOR THE ISSUES THAT IMPROVE AND ENHANCE LIVES IN THE COUNTY IT SERVES THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY FULFILLS ITS MISSION BY -ENGAGING PRIVATE GIVING FOR PUBLIC GOOD, -BUILDING AND MAINTAINING PERMANENT ENDOWMENTS TO RESPOND TO CHANGING COMMUNITY NEEDS, -PROVIDING FLEXIBLE TAX-EXEMPT VEHICLES FOR DONORS WITH VARIED CHARITABLE INTERESTS AND ABILITIES TO GIVE, -SERVING AS A CATALYST AND RESOURCE TO EFFECTIVELY RESPOND TO COMMUNITY NEEDS THROUGH SCHOLARSHIPS, AND- STRENGTHENING THE NON-PROFIT SECTOR THROUGH GRANTS AND DEVELOPMENT ASSISTANCE

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3 Number of voting members of the governing body (Part VI, line 1a)

4 Number of independent voting members of the governing body (Part VI, line 1b)

5 Total number of individuals employed in calendar year 2016 (Part V, line 2a)

6 Total number of volunteers (estimate if necessary)

7a Total unrelated business revenue from Part VIII, column (C), line 12

7b Net unrelated business taxable income from Form 990-T, line 34

Revenue

8 Contributions and grants (Part VIII, line 1h)

9 Program service revenue (Part VIII, line 2g)

10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)

11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)

12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)

Prior Year

Current Year

Expenses

13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)

14 Benefits paid to or for members (Part IX, column (A), line 4)

15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)

16a Professional fundraising fees (Part IX, column (A), line 11e)

b Total fundraising expenses (Part IX, column (D), line 25) ▶150,921

17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)

18 Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)

19 Revenue less expenses Subtract line 18 from line 12

Beginning of Current Year

End of Year

Net Assets or Fund Balances

20 Total assets (Part X, line 16)

21 Total liabilities (Part X, line 26)

22 Net assets or fund balances Subtract line 21 from line 20

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge

Signature of officer

HEIDI MCPHERSON CHIEF EXECUTIVE OFFICER

Type or print name and title

2017-05-03

Date

Paid Preparer Use Only

Print/Type preparer's name

KIMBERLYN SPILLER

Preparer's signature

KIMBERLYN SPILLER

Date

Check ☐ if self-employed

PTIN

P01491937

Firm's name ▶ CALIBER AUDIT & ATTEST LLP

Firm's EIN ▶ 26-2350873

Firm's address ▶ 265 SOUTH STREET SUITE A

Phone no (805) 888-0240

SAN LUIS OBISPO, CA 93401

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No 11282Y

Form 990 (2016)

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III ☐

1 Briefly describe the organization's mission:

TO PROVIDE LEADERSHIP AND TO ENCOURAGE CHARITABLE GIVING FOR THE ISSUES THAT IMPROVE AND ENHANCE LIVES IN THE COUNTY IT SERVES

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code) (Expenses \$ 2,711,338 including grants of \$ 2,148,335) (Revenue \$)
 THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY SERVES THE ENTIRE COUNTY OF SAN LUIS OBISPO, FUNDING A WIDE RANGE OF INITIATIVES, PROJECTS AND ORGANIZATIONS THROUGH THE GENEROSITY OF OUR DONORS, PAST AND PRESENT, PHILANTHROPY IS PROMOTED THAT STRENGTHENS CIVIC LIFE ACROSS THE SAN LUIS OBISPO COUNTY REGION IN RESPONSE TO THE EVER CHANGING DEMOGRAPHICS AND NEEDS OF OUR COMMUNITIES. WE FOCUS OUR GRANTMAKING ON THE FOLLOWING CORE AREAS: ARTS & CULTURE, EDUCATION, HEALTH, HUMAN SERVICES, SCHOLARSHIPS, ENVIRONMENT AND COMMUNITY ENHANCEMENT.

4b (Code) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O)
 (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 2,711,338

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	1 Yes	
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	2 Yes	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	3	No
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	4	No
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III	5	No
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6 Yes	
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7	No
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	8	No
9 Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV	9 Yes	
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V	10 Yes	
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI	11a Yes	
b Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b Yes	
c Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c	No
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	11d	No
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e Yes	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f Yes	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	12a	No
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b Yes	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13	No
14a Did the organization maintain an office, employees, or agents outside of the United States?	14a	No
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	14b	No
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	15	No
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16	No
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)	17	No
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18 Yes	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19	No

Part IV Checklist of Required Schedules (continued)

	Yes	No
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		No
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	Yes	
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	Yes	
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>		No
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		No
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		No
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		No
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i>		No
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>		No
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions) a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		No
b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		No
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>		No
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	Yes	
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		No
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		No
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		No
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		No
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>	Yes	
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	Yes	
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	Yes	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		No
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		No
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	Yes	

Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V ☐

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable.	11	
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	0	
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	Yes	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.	9	
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	Yes	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		No
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O.		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		No
b	If "Yes," enter the name of the foreign country: _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	Yes	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	Yes	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		No
d	If "Yes," indicate the number of Forms 8282 filed during the year.	7d	
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		No
9a	Did the sponsoring organization make any taxable distributions under section 4966?		No
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		No
10	Section 501(c)(7) organizations. Enter		
a	Initiation fees and capital contributions included on Part VIII, line 12.	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.	10b	
11	Section 501(c)(12) organizations. Enter		
a	Gross income from members or shareholders.	11a	
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	12b	
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.	13b	
c	Enter the amount of reserves on hand.	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	No
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.	14b	

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI ☒

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	15	
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O			
b	Enter the number of voting members included in line 1a, above, who are independent	15	
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3	No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5	No
6	Did the organization have members or stockholders?	6	No
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	No
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b	No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	8a	Yes
b	Each committee with authority to act on behalf of the governing body?	8b	Yes
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9	No

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a	No
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	12c	Yes
13	Did the organization have a written whistleblower policy?	13	Yes
14	Did the organization have a written document retention and destruction policy?	14	Yes
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a	The organization's CEO, Executive Director, or top management official	15a	Yes
b	Other officers or key employees of the organization	15b	Yes
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	No
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed: CA

18 Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☒ Own website ☒ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records.
 ▶ DONNA JONES 550 DANA STREET SAN LUIS OBISPO, CA 93401 (805) 543-2323

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(1) STEVE MCCARTY PRESIDENT	4 00 1 00	X		X				0	0	0
(2) JIM BRABECK DIRECTOR	4 00	X						0	0	0
(3) STEVE JOBST DIRECTOR	4 00	X						0	0	0
(4) MIKE PATRICK DIRECTOR	4 00 1 00	X						0	0	0
(5) TOM SHERMAN CFO/TREASURER	4 00	X		X				0	0	0
(6) JOHNNIE TALLEY DIRECTOR	4 00	X						0	0	0
(7) JIM GLINN SECRETARY	4 00	X		X				0	0	0
(8) GWEN ERSKINE DIRECTOR	4 00 1 00	X						0	0	0
(9) JEFF BUCKINGHAM DIRECTOR	4 00	X						0	0	0
(10) MARY VERDIN VICE PRESIDENT	4 00	X		X				0	0	0
(11) CLAIRE CLARK DIRECTOR	4 00	X						0	0	0
(12) GREENDA ERNST DIRECTOR	4 00	X						0	0	0
(13) JOAN PARKER DIRECTOR	4 00	X						0	0	0
(14) ANN ROBINSON DIRECTOR	4 00	X						0	0	0
(15) BEN MCADAMS DIRECTOR	4 00	X						0	0	0
(16) HEIDI MCPHERSON CHIEF EXECUTIVE OFFICER	50 00 5 00			X				131,049	0	4,064
(17) DONNA JONES DIRECTOR OF FINANCE AND AD	40 00 5 00			X				76,188	0	1,626

[illegible]

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ▶ 1

Section B. Independent Contractors

(A)	(B)	(C)
Name and business address	Description of services	Compensation

Form 990 (2016)

Part VIII **Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII ☐

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns . . .	1a				
	b Membership dues . . .	1b				
	c Fundraising events . . .	1c	92,475			
	d Related organizations	1d				
	e Government grants (contributions)	1e				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	3,209,538			
	g Noncash contributions included in lines 1a-1f \$		263,066			
	h Total. Add lines 1a-1f		3,302,013			
Program Service Revenue	2a _____	Business Code				
	b _____					
	c _____					
	d _____					
	e _____					
	f All other program service revenue					
	g Total. Add lines 2a-2f					
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		1,220,522			1,220,522
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6a Gross rents	(i) Real (ii) Personal				
	b Less rental expenses					
	c Rental income or (loss)					
	d Net rental income or (loss)					
	7a Gross amount from sales of assets other than inventory	(i) Securities (ii) Other				
	b Less cost or other basis and sales expenses					
	c Gain or (loss)					
	d Net gain or (loss)		565,692			565,692
	8a Gross income from fundraising events (not including \$ 92,475 of contributions reported on line 1c) See Part IV, line 18	a 51,600				
	b Less direct expenses	b 27,238				
	c Net income or (loss) from fundraising events		24,362			24,362
	9a Gross income from gaming activities See Part IV, line 19	a				
	b Less direct expenses	b				
	c Net income or (loss) from gaming activities					
	10a Gross sales of inventory, less returns and allowances	a				
	b Less cost of goods sold	b				
	c Net income or (loss) from sales of inventory					
Miscellaneous Revenue Business Code						
11a CHANGE IN SPLIT INTEREST	900099	356,268	356,268			
b OTHER REVENUE	900099	28,011	28,011			
c INCOME HELD FOR OTHERS	900099	-590,508	-590,508			
d All other revenue						
e Total. Add lines 11a-11d		-206,229				
12 Total revenue. See Instructions		4,906,360	-206,229	0	1,810,576	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.				
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.	1,954,279	1,954,279		
2 Grants and other assistance to domestic individuals. See Part IV, line 22.	194,056	194,056		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, line 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	207,236	72,533	93,256	41,447
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).				
7 Other salaries and wages.	233,709	81,798	105,169	46,742
8 Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions).	11,126	3,894	5,007	2,225
9 Other employee benefits.	50,586	17,705	22,764	10,117
10 Payroll taxes.	36,585	12,805	16,463	7,317
11 Fees for services (non-employees):				
a Management.				
b Legal.				
c Accounting.	23,075		23,075	
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.	332,180	332,180		
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O).	1,500		1,500	
12 Advertising and promotion.	4,985	1,645	1,695	1,645
13 Office expenses.	21,630	7,138	7,354	7,138
14 Information technology.	29,294	9,667	9,960	9,667
15 Royalties.				
16 Occupancy.	12,927	4,266	4,395	4,266
17 Travel.	7,767	2,563	2,641	2,563
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.				
20 Interest.				
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	56,540	18,658	19,224	18,658
23 Insurance.	10,577	1,253	8,608	716
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O):				
a FUND OPERATION EXPENSE	161,351	161,351		
b MISCELLANEOUS	42,106	13,868	14,895	13,343
c PROGRAM EXPENSE	22,956	15,591	0	7,365
d MEMBERSHIP DUES AND SUB	15,121	4,990	5,141	4,990
e All other expenses	-226,340	-198,902	-160	-27,278
25 Total functional expenses. Add lines 1 through 24e.	3,203,246	2,711,338	340,987	150,921
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720).				

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part IX ☐

				(A) Beginning of year		(B) End of year
Assets	1	Cash—non-interest-bearing		338,862	1	375,571
	2	Savings and temporary cash investments		4,997,705	2	5,382,284
	3	Pledges and grants receivable, net			3	
	4	Accounts receivable, net			4	
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L.			5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L.			6	
	7	Notes and loans receivable, net			7	
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges		7,456	9	11,648
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.	10a	1,954,513		
	b	Less: accumulated depreciation	10b	314,684		
				1,692,913	10c	1,639,829
	11	Investments—publicly traded securities		23,832,617	11	26,631,292
	12	Investments—other securities. See Part IV, line 11		17,186,015	12	16,927,501
	13	Investments—program-related. See Part IV, line 11		100,000	13	0
	14	Intangible assets			14	
15	Other assets. See Part IV, line 11		1,321,737	15	1,836,590	
16	Total assets. Add lines 1 through 15 (must equal line 34)		49,477,305	16	52,804,715	
Liabilities	17	Accounts payable and accrued expenses		37,703	17	86,982
	18	Grants payable		442,992	18	247,267
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D.		3,816,069	21	4,017,632
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L			22	
	23	Secured mortgages and notes payable to unrelated third parties			23	
	24	Unsecured notes and loans payable to unrelated third parties			24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D.		525,595	25	684,486
	26	Total liabilities. Add lines 17 through 25		4,822,359	26	5,036,367
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here ☒ and complete lines 27 through 29, and lines 33 and 34.					
	27	Unrestricted net assets		4,378,849	27	4,179,555
	28	Temporarily restricted net assets		20,433,970	28	22,633,399
	29	Permanently restricted net assets		19,842,127	29	20,955,394
	Organizations that do not follow SFAS 117 (ASC 958), check here ☐ and complete lines 30 through 34.					
	30	Capital stock or trust principal, or current funds			30	
	31	Paid-in or capital surplus, or land, building or equipment fund			31	
	32	Retained earnings, endowment, accumulated income, or other funds			32	
	33	Total net assets or fund balances		44,654,946	33	47,768,348
	34	Total liabilities and net assets/fund balances		49,477,305	34	52,804,715

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI ☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,906,360
2	Total expenses (must equal Part IX, column (A), line 25)	2	3,203,246
3	Revenue less expenses Subtract line 2 from line 1	3	1,703,114
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	44,654,946
5	Net unrealized gains (losses) on investments	5	1,275,122
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	135,166
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	47,768,348

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII ☒

	Yes	No
1 Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis		No
b Were the organization's financial statements audited by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both ☐ Separate basis ☒ Consolidated basis ☐ Both consolidated and separate basis	Yes	
c If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O	Yes	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		No
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

Additional Data

Software ID:

Software Version:

EIN: 77-0496500

Name: THE COMMUNITY FOUNDATION SAN LUIS OBISPO
COUNTY

SCHEDULE A (Form 990 or 990-EZ)	Public Charity Status and Public Support Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust. ▶ Attach to Form 990 or Form 990-EZ. ▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990 .	OMB No 1545-0047
		2016 Open to Public Inspection

Department of the Treasury Internal Revenue Service Name of the organization THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY	Employer identification number 77-0496500
--	---

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.
The organization is not a private foundation because it is (For lines 1 through 12, check only one box)

- 1

☐

A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2

☐

A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ))
- 3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state _____
- 5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)
- 6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7

☒

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II)
- 8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)
- 9

☐

An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture See instructions Enter the name, city, and state of the college or university _____
- 10

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III)
- 11

☐

An organization organized and operated exclusively to test for public safety See **section 509(a)(4).**
- 12

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g
- a

☐

Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**
- b

☐

Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**
- c

☐

Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**
- d

☐

Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**
- e

☐

Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization
- f

Enter the number of supported organizations _____
- g

Provide the following information about the supported organization(s) _____

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, 8, or 9 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support						
Calendar year (or fiscal year beginning in) ►	(a)2012	(b)2013	(c)2014	(d)2015	(e)2016	(f)Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grant.")	6,306,230	2,247,578	7,793,849	5,650,351	2,978,383	24,976,391
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	6,306,230	2,247,578	7,793,849	5,650,351	2,978,383	24,976,391
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4						24,976,391

Section B. Total Support							
Calendar year (or fiscal year beginning in) ►		(a)2012	(b)2013	(c)2014	(d)2015	(e)2016	(f)Total
7	Amounts from line 4	6,306,230	2,247,578	7,793,849	5,650,351	2,978,383	24,976,391
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	950,279	986,186	1,148,940	1,200,724	1,220,522	5,506,651
9	Net income from unrelated business activities, whether or not the business is regularly carried on						
10	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11	Total support. Add lines 7 through 10						30,483,042
12	Gross receipts from related activities, etc. (see instructions)					12	
13	First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ► ☐						

Section C. Computation of Public Support Percentage		
14 Public support percentage for 2016 (line 6, column (f) divided by line 11, column (f))	14	81.940 %
15 Public support percentage for 2015 Schedule A, Part II, line 14	15	82.730 %
16a 33 1/3% support test—2016. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here . The organization qualifies as a publicly supported organization. ► ☒		
b 33 1/3% support test—2015. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here . The organization qualifies as a publicly supported organization. ► ☐		
17a 10%-facts-and-circumstances test—2016. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here . Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization. ► ☐		
b 10%-facts-and-circumstances test—2015. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here . Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization. ► ☐		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions. ► ☐		

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a)2012	(b)2013	(c)2014	(d)2015	(e)2016	(f)Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a)2012	(b)2013	(c)2014	(d)2015	(e)2016	(f)Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2016 (line 8, column (f) divided by line 13, column (f))	15	
16 Public support percentage from 2015 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2016 (line 10c, column (f) divided by line 13, column (f))	17	
18 Investment income percentage from 2015 Schedule A, Part III, line 17	18	

19a 33 1/3% support tests—2016. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b 33 1/3% support tests—2015. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>	1	
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>	2	
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>	3a	
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>	3b	
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>	3c	
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes" and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>	4a	
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>	4b	
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>	4c	
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>	5a	
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b	
c Substitutions only. Was the substitution the result of an event beyond the organization's control?	5c	
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>	6	
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>	7	
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>	8	
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>	9a	
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>	9b	
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>	9c	
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>	10a	
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>	10b	

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
b A family member of a person described in (a) above?		
c A 35% controlled entity of a person described in (a) or (b) above? <i>If "Yes" to a, b, or c, provide detail in Part VI</i>		
11a		
11b		
11c		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.</i>		
1		
2		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>		
1		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		
1		
2		
3		

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)		
a ☐ The organization satisfied the Activities Test. Complete line 2 below.		
b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.		
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
2 Activities Test Answer (a) and (b) below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>		
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
3 Parent of Supported Organizations Answer (a) and (b) below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>Provide details in Part VI.</i>		
b Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		
2a		
2b		
3a		
3b		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1** ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970. **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income

	(A) Prior Year	(B) Current Year (optional)
1 Net short-term capital gain	1	
2 Recoveries of prior-year distributions	2	
3 Other gross income (see instructions)	3	
4 Add lines 1 through 3	4	
5 Depreciation and depletion	5	
6 Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7 Other expenses (see instructions)	7	
8 Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8	

Section B - Minimum Asset Amount

	(A) Prior Year	(B) Current Year (optional)
1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year)	1	
a Average monthly value of securities	1a	
b Average monthly cash balances	1b	
c Fair market value of other non-exempt-use assets	1c	
d Total (add lines 1a, 1b, and 1c)	1d	
e Discount claimed for blockage or other factors (explain in detail in Part VI)		
2 Acquisition indebtedness applicable to non-exempt use assets	2	
3 Subtract line 2 from line 1d	3	
4 Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5 Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6 Multiply line 5 by .035	6	
7 Recoveries of prior-year distributions	7	
8 Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount

		Current Year
1 Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2 Enter 85% of line 1	2	
3 Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4 Enter greater of line 2 or line 3	4	
5 Income tax imposed in prior year	5	
6 Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7 ☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)		

Part V

Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI) See instructions	
7 Total annual distributions. Add lines 1 through 6	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI) See instructions	
9 Distributable amount for 2016 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2016	(iii) Distributable Amount for 2016
1 Distributable amount for 2016 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2016 (reasonable cause required--see instructions)			
3 Excess distributions carryover, if any, to 2016			
a			
b			
c From 2013.			
d From 2014.			
e From 2015.			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2016 distributable amount			
i Carryover from 2011 not applied (see instructions)			
j Remainder Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2016 from Section D, line 7 \$			
a Applied to underdistributions of prior years			
b Applied to 2016 distributable amount			
c Remainder Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2016, if any Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions)			
6 Remaining underdistributions for 2016 Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions)			
7 Excess distributions carryover to 2017. Add lines 3j and 4c			
8 Breakdown of line 7			
a			
b Excess from 2013.			
c Excess from 2014.			
d Excess from 2015.			
e Excess from 2016.			

Part VI **Supplemental Information.**

Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -		DLN: 93493124020647	
SCHEDULE D (Form 990) Department of the Treasury Internal Revenue Service		Supplemental Financial Statements ► Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. ► Attach to Form 990. Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.			OMB No 1545-0047 2016 Open to Public Inspection
Name of the organization THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY				Employer identification number 77-0496500	
Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.					
		(a) Donor advised funds		(b) Funds and other accounts	
1	Total number at end of year	88			
2	Aggregate value of contributions to (during year)	1,250,018			
3	Aggregate value of grants from (during year)	779,977			
4	Aggregate value at end of year	17,674,166			
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?				☒ Yes ☐ No	
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?				☒ Yes ☐ No	
Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.					
1 Purpose(s) of conservation easements held by the organization (check all that apply)					
☐ Preservation of land for public use (e g , recreation or education) ☐ Preservation of an historically important land area					
☐ Protection of natural habitat ☐ Preservation of a certified historic structure					
☐ Preservation of open space					
2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year					
		Held at the End of the Year			
a	Total number of conservation easements	2a			
b	Total acreage restricted by conservation easements	2b			
c	Number of conservation easements on a certified historic structure included in (a)	2c			
d	Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	2d			
3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ►					
4 Number of states where property subject to conservation easement is located ►					
5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No					
6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ►					
7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ► \$					
8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No					
9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements					
Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 8.					
1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items					
b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items					
(i) Revenue included on Form 990, Part VIII, line 1				► \$	
(ii) Assets included in Form 990, Part X				► \$	
2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items					
a Revenue included on Form 990, Part VIII, line 1				► \$	
b Assets included in Form 990, Part X				► \$	
For Paperwork Reduction Act Notice, see the Instructions for Form 990.					
			Cat No 52283D Schedule D (Form 990) 2016		

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3

Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐ Public exhibition

b

☐ Scholarly research

c

☐ Preservation for future generations

d

☐ Loan or exchange programs

e

☐ Other

4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII

5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV

Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☒ No

b

If "Yes," explain the arrangement in Part XIII and complete the following table

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

	Amount
1c	
1d	
1e	
1f	

2a

Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?

☒ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII

☒

Part V

Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a)Current year	(b)Prior year	(c)Two years back	(d)Three years back	(e)Four years back
1a Beginning of year balance	39,474,090	36,777,574	30,738,701	27,579,523	23,725,340
b Contributions	2,071,884	5,038,530	6,438,421	1,136,386	1,593,977
c Net investment earnings, gains, and losses	2,786,355	-345,872	1,672,280	3,542,480	2,818,887
d Grants or scholarships	1,901,809	1,996,142	2,071,828	1,519,688	558,681
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance	42,430,520	39,474,090	36,777,574	30,738,701	27,579,523

2

Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

a

Board designated or quasi-endowment

b

Permanent endowment

54 000 %

c

Temporarily restricted endowment

46 000 %

The percentages on lines 2a, 2b, and 2c should equal 100%

3a

Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i)

unrelated organizations

(ii)

related organizations

b

If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?

	Yes	No
3a(i)		No
3a(ii)		No
3b		

4

Describe in Part XIII the intended uses of the organization's endowment funds

Part VI

Land, Buildings, and Equipment.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		425,000		425,000
b Buildings		1,275,000	170,000	1,105,000
c Leasehold improvements				
d Equipment				
e Other		254,513	144,684	109,829
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c))				1,639,829

Schedule D (Form 990) 2016

Part VII

Investments—Other Securities. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11b.
See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other _____		
(A) HALL CAPITAL& COMMON FUND HEDGE FUNDS	2,954,584	F
(B) FIXED INCOME/MUTUAL FUNDS	10,813,429	F
(C) US GOVERNMENT AND CORPORATE BONDS	3,159,488	F
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Column (b) must equal Form 990, Part X, col (B) line 12) ▶	16,927,501	

Part VIII

Investments—Program Related. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c.
See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Column (b) must equal Form 990, Part X, col (B) line 13) ▶		

Part IX

Other Assets. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d See Form 990, Part X, line 15

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col (B) line 15) ▶	

Part X

Other Liabilities. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f.
See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
PAYROLL LIABILITIES	6,170
LIABILITIES TO BENEFICIARIES FROM SPLIT INTEREST AGREEMENTS	678,316
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col (B) line 25) ▶	684,486

2. Liability for uncertain tax positions In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII

☒

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	6,284,355
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains (losses) on investments	2a	1,275,122
b	Donated services and use of facilities	2b	39,972
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII)	2d	62,901
e	Add lines 2a through 2d	2e	1,377,995
3	Subtract line 2e from line 1	3	4,906,360
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII)	4b	
c	Add lines 4a and 4b	4c	0
5	Total revenue Add lines 3 and 4c . (This must equal Form 990, Part I, line 12)	5	4,906,360

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	3,298,417
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	39,972
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII)	2d	55,199
e	Add lines 2a through 2d	2e	95,171
3	Subtract line 2e from line 1	3	3,203,246
4	Amounts included on Form 990, Part IX, line 25, but not on line 1 :		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII)	4b	
c	Add lines 4a and 4b	4c	0
5	Total expenses Add lines 3 and 4c . (This must equal Form 990, Part I, line 18)	5	3,203,246

Part XIII Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Return Reference	Explanation
See Additional Data Table	

Part XIII **Supplemental Information** *(continued)*

Return Reference	Explanation

Additional Data

Software ID:
Software Version:
EIN: 77-0496500
Name: THE COMMUNITY FOUNDATION SAN LUIS OBISPO
COUNTY

Supplemental Information

Return Reference	Explanation
PART IV, LINE 2B	THE ORGANIZATION HOLDS AMOUNTS ON BEHALF OF OTHERS AND UNAFFILIATED NON-PROFIT ORGANIZATIONS FOR THEIR DESIGNATED USE, WHICH FOR FINANCIAL STATEMENT PURPOSES IS ACCOUNTED FOR BY THE ORGANIZATION SUBJECT TO THE GUIDANCE PROVIDED BY THE FASB CODIFICATION TOPIC RELATED TO AGENCY TRANSACTIONS (FASB ASC 985-605-25, PARAGRAPHS 21 THROUGH 33)

Supplemental Information

Return Reference	Explanation
PART V, LINE 4	INTENDED USE OF THE ORGANIZATION'S ENDOWMENT FUNDS IS TO USE THE EARNINGS IN THE COMMUNITY FOR NON-PROFIT ORGANIZATIONS AND HELP INDIVIDUAL DONORS DIRECT THEIR CHARITABLE GIVING T HE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY ENCOURAGES DONORS AND AGENCIES TO OPEN ENDO WMENT FUNDS FOR THE PURPOSE OF ENSURING FUTURE SUPPORT FOR THE NON-PROFIT AGENCIES WITHIN THE REGION AT THIS TIME, THE AMOUNT OF EARNINGS DISTRIBUTED IS DETERMINED BY THE FOUNDATI ON'S SPENDING POLICY WHICH IS TO DISBURSE UP TO 4 00% PER ANNUM OF THE PRECEDING 12 QUARTE R TRAILING AVERAGE INVESTED IN THE POOL PER FUND

Supplemental Information

Return Reference	Explanation
PART X, LINE 2	FROM AUDITED FINANCIAL STATEMENTS FOOTNOTE THE FOUNDATION'S ACTIVITIES ARE GENERALLY EXEMPT FROM FEDERAL AND STATE INCOME TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND SECTION 23701(D) OF THE CALIFORNIA FRANCHISE TAX CODE SINCE THE FOUNDATION IS EXEMPT FROM FEDERAL AND STATE INCOME TAX LIABILITY, NO PROVISION IS MADE FOR CURRENT OR DEFERRED INCOME TAX EXPENSE FOR THE YEARS ENDED DECEMBER 31, 2016 AND 2015, MANAGEMENT OF THE FOUNDATION IS NOT AWARE OF ANY MATERIAL UNCERTAIN TAX POSITIONS TO BE ACCOUNTED FOR IN THE CONSOLIDATED FINANCIAL STATEMENTS UNDER THE PRINCIPLES OF THE INCOME TAXES TOPIC OF THE FINANCIAL ACCOUNTING STANDARDS BOARD (FASB) ACCOUNTING STANDARDS CODIFICATION (ASC) THE FOUNDATION RECOGNIZES INTEREST AND PENALTIES, IF ANY, RELATED TO UNRECOGNIZED TAX BENEFITS IN INTEREST EXPENSE ALL TAX EXEMPT ENTITIES ARE SUBJECT TO REVIEW AND AUDIT BY FEDERAL, STATE AND OTHER APPLICABLE AGENCIES SUCH AGENCIES MAY REVIEW THE TAXABILITY OF UNRELATED BUSINESS INCOME, OR THE QUALIFICATION OF THE TAX-EXEMPT ENTITY UNDER THE INTERNAL REVENUE CODE AND APPLICABLE STATE STATUTES

Supplemental Information	
Return Reference	Explanation
PART XI, LINE 2D - OTHER ADJUSTMENTS	INCOME RECORDED BY SUPPORTING ORG INCLUDED IN THE CONSOLIDATED AUDITED FINANCIAL STATEMENT S TRANSFER RECORDED FROM SUPPORTING ORG INCLUDED IN THE CONSOLIDATED AUDITED FINANCIAL STA TEMENTS DIRECT EXPENSES FROM FUNDRAISING EVENT

Supplemental Information	
Return Reference	Explanation
PART XII, LINE 2D - OTHER ADJUSTMENTS	EXPENSES RECORDED BY SUPPORTING ORG INCLUDED IN THE CONSOLIDATED AUDITED FINANCIAL STATEMENTS DIRECT EXPENSES FROM FUNDRAISING EVENT

SCHEDULE G (Form 990 or 990-EZ)	Supplemental Information Regarding Fundraising or Gaming Activities Complete if the organization answered "Yes" on Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a ▶ Attach to Form 990 or Form 990-EZ. ▶ Information about Schedule G (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990 .	OMB No 1545-0047 2016 Open to Public Inspection
Department of the Treasury Internal Revenue Service	Name of the organization THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY	Employer identification number 77-0496500

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

a ☐ Mail solicitations	e ☐ Solicitation of non-government grants
b ☐ Internet and email solicitations	f ☐ Solicitation of government grants
c ☐ Phone solicitations	g ☐ Special fundraising events
d ☐ In-person solicitations	

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☐ Yes ☐ No

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
Total ▶						

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

Revenue		(a) Event #1	(b) Event #2	(c) Other events	(d)
		WOMEN'S LEGACY LUNCHEON (event type)	(event type)	(total number)	Total events (add col (a) through col (c))
1	Gross receipts	144,075			144,075
2	Less Contributions	92,475			92,475
3	Gross income (line 1 minus line 2)	51,600			51,600
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages	12,958			12,958
	8 Entertainment	2,250			2,250
	9 Other direct expenses	12,030			12,030
	10 Direct expense summary Add lines 4 through 9 in column (d) ▶				27,238
11 Net income summary Subtract line 10 from line 3, column (d) ▶				24,362	

Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

Revenue		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col (a) through col (c))
1	Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	
	7 Direct expense summary Add lines 2 through 5 in column (d) ▶				
	8 Net gaming income summary Subtract line 7 from line 1, column (d) ▶				

9 Enter the state(s) in which the organization conducts gaming activities _____

a Is the organization licensed to conduct gaming activities in each of these states?

☐ Yes ☐ No

b If "No," explain _____

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?

☐ Yes ☐ No

b If "Yes," explain _____

- 11** Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12** Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No
- 13** Indicate the percentage of gaming activity conducted in
- | | | |
|--------------------------------------|------------|---|
| a The organization's facility | 13a | % |
| b An outside facility | 13b | % |
- 14** Enter the name and address of the person who prepares the organization's gaming/special events books and records

Name ►

Address ►

- 15a** Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

- b** If "Yes," enter the amount of gaming revenue received by the organization ► \$ _____ and the amount of gaming revenue retained by the third party ► \$ _____

- c** If "Yes," enter name and address of the third party

Name ►

Address ►

16 Gaming manager information

Name ►

Gaming manager compensation ► \$

Description of services provided ►

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions

- a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No
- b** Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$ _____

Part IV **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also complete this part to provide any additional information (see instructions).

Return Reference

Explanation

efile GRAPHIC print - DO NOT PROCESS

As Filed Data -

DLN: 93493124020647

Schedule I
(Form 990)

Department of the
Treasury
Internal Revenue Service

OMB No 1545-0047

2016

Open to Public
Inspection

Grants and Other Assistance to Organizations,
Governments and Individuals in the United States

Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990.

▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

Name of the organization
THE COMMUNITY FOUNDATION SAN LUIS OBISPO
COUNTY

Employer identification number
77-0496500

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
See Additional Data Table							
(1)							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 111

3 Enter total number of other organizations listed in the line 1 table 20

Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22

Part III can be duplicated if additional space is needed

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
See Additional Data Table					
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					
(7)					

Part IV **Supplemental Information.** Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

Return Reference	Explanation
PART I, LINE 2	IN GENERAL, FOUNDATION GRANTS ARE REQUIRED TO FILE, AT MINIMUM, A FINAL WRITTEN GRANT REPORT AT THE END OF THE GRANT TERM, WITH THE EXCEPTION OF GRANTS THAT ARE MADE FROM DONOR ADVISED FUNDS UPON OF THE RECOMMENDATION OF THE DONOR. FOR MULTI-YEAR GRANTS, INTERIM WRITTEN REPORTS ARE REQUIRED IN ADDITION TO THE FINAL REPORT. GRANT REPORT REQUIREMENTS INCLUDE BOTH A NARRATIVE STATUS REPORT AND FINANCIAL ACCOUNTING OF THE USE OF THE FUNDS. ALL FOUNDATION GRANTS ARE SUBJECT TO AN INTERIM SITE VISIT, USUALLY HALF-WAY THROUGH THE GRANT TERM, BY FOUNDATION PROGRAM STAFF. THESE SITE VISITS ARE RECORDED IN THE GRANT FILE.

Additional Data

Software ID:
Software Version:
EIN: 77-0496500
Name: THE COMMUNITY FOUNDATION SAN LUIS OBISPO
COUNTY

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COMMUNITY ACTION PARTNERSHIP OF SAN LUIS OBISPO COUNTY 1030 SOUTHWOOD DRIVE SAN LUIS OBISPO, CA 93401	95-2410253	501(C)(3)	80,000		-	N/A	SOUTH COUNTY SUPPORTIVE SERVICES PROGRAM
SAN LUIS OBISPO SYMPHONY INC PO BOX 658 SAN LUIS OBISPO, CA 93406	95-2493144	501(C)(3)	52,790		-	N/A	ARTS
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY PO BOX 1444 SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	50,000		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CAL POLY FOUNDATION I GRAND AVE HERON HALL SAN LUIS OBISPO, CA 93407	20-4927897	501(C)(3)	49,000		-	N/A	TO SUPPORT THE SOCIAL ENTERPRISE PROGRAM AT THE INCUBATOR
FIDELITY CHARITABLE GIFT FUND PO BOX 770001 CINCINNATI, OH 452770053	11-0303001		46,543		-	N/A	TO TRANSFER THE BALANCE OF THE FUND TO FIDELITY CHARITABLE
CENTRAL COAST AQUARIUM PO BOX 460 AVILA BEACH, CA 93424	77-0479110	501(C)(3)	46,058		-	N/A	LIFE SUPPORT SYSTEM UPGRADES

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
EASTER SEALS OF SOUTHERN CALIFORNIA 1570 EAST 17TH STREET SANTA ANA, CA 92705	94-3068149		45,541		-	N/A	EASTER SEALS OF SOUTHERN CALIFORNIA
FOOTHILL COUNTRY DAY SCHOOL 1035 WEST HARRISON AVENUE CLAREMONT, CA 91711	95-1816057		43,510		-	N/A	RE-GRADE, RESOD, AND ENLARGE THE UPPER FIELD WITH DROUGHT-TOLERANT HYBRID BERMUDA AND INSTALL NEW SPRINKLERS
JACK'S HELPING HAND PO BOX 14718 SAN LUIS OBISPO, CA 93406	20-4731313	501(C)(3)	40,000		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SLO COUNTY OFFICE OF EDUCATION 3350 EDUCATION DRIVE SAN LUIS OBISPO, CA 93405		GOVERNMENT	40,000		-	N/A	2016 RAISING A READER PROGRAM
BOYS & GIRLS CLUB OF NORTH SLO COUNTY PO BOX 3037 PASO ROBLES, CA 93447	77-0272094	501(C)(3)	40,000		-	N/A	EXECUTE BOYS & GIRLS CLUB OF AMERICA SMART GIRLS CURRICULUM, COUPLED WITH ON-SITE ONE-TO-ONE MENTORING FOR ALL PARTICIPANTS
CAL POLY FOUNDATION I GRAND AVE HERON HALL SAN LUIS OBISPO, CA 93407	20-4927897	501(C)(3)	27,828		-	N/A	MUSIC DEPT BUILDING CAPITAL IMPROVEMENTS

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CAL POLY FOUNDATION I GRAND AVE HERON HALL SAN LUIS OBISPO, CA 93407	20-4927897	501(C)(3)	27,828		-	N/A	COLLEGE OF AGRICULTURE BUILDING
FOOD BANK COALITION OF SAN LUIS OBISPO COUNTY 1180 KENDALL ROAD SAN LUIS OBISPO, CA 93401	77-0210727	501(C)(3)	25,736		-	N/A	ANNUAL DISTRIBUTION
BRIDGE TO TURKIYE FUND 100 FOX BRIAR LANE CARY, NC 27518	58-2678580	501(C)(3)	24,798		-	N/A	S SAMI SOLU, M D CHARITABLE FUND SCHOLARSHIP

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SOUTH COUNTY EDUCATION FOUNDATION POST OFFICE BOX 222 ARROYO GRANDE, CA 934210222	77-0020195	501(C)(3)	24,000		-	N/A	SOUTH COUNTY SCHOOL DISTRICT SUPPORT
MEALS THAT CONNECT FORMERLY THE SENIOR NUTRITION PROGRAM OF SLO COUNTY 2180 JOHNSON AVENUE SAN LUIS OBISPO, CA 93401	77-0279528	501(C)(3)	24,000		-	N/A	SENIOR NUTRITION PROGRAM
COMMUNITY ACTION PARTNERSHIP OF SAN LUIS OBISPO COUNTY 1030 SOUTHWOOD DRIVE SAN LUIS OBISPO, CA 93401	95-2410253	501(C)(3)	20,684		-	N/A	OPERATIONS OF PRADO DAY CENTER

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TRANSITIONS-MENTAL HEALTH ASSOCIATION 784 HIGH STREET SAN LUIS OBISPO, CA 93401	95-3509040	501(C)(3)	20,000		-	N/A	INDEPENDENT LIVING PROGRAM
MAURY MAGIC RIDERS INC PO BOX 560 COLUMBIA, TN 38402	62-1742129	501(C)(3)	20,000		-	N/A	UNRESTRICTED
TRANSITIONAL FOOD AND SHELTER INC PO BOX 4471 PASO ROBLES, CA 93447	77-0489535	501(C)(3)	17,350		-	N/A	TEMPORARY EMERGENCY SHELTER FOR THE HOMELESS

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FOOD BANK COALITION OF SAN LUIS OBISPO COUNTY 1180 KENDALL ROAD SAN LUIS OBISPO, CA 93401	77-0210727	501(C)(3)	15,800		-	N/A	NO-COOK BAGS PROGRAM
ARTS OBISPO 1123 MILL STREET SAN LUIS OBISPO, CA 93401	95-3738562	501(C)(3)	15,430		-	N/A	ARTS OBISPO
WOMEN'S SHELTER PROGRAM OF SAN LUIS OBISPO COUNTY PO BOX 125 SAN LUIS OBISPO, CA 93406	95-3370729	501(C)(3)	15,000		-	N/A	MOVE-IN AND CASE MANAGEMENT

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CAL POLY ATHLETIC ADVANCEMENT 1 GRAND AVENUE SAN LUIS OBISPO, CA 93407		GOVERNMENT	15,000		-	N/A	THE MOTT IMPROVMENT FUND
FRENCH HOSPITAL MEDICAL CENTER FOUNDATION AND PUBLIC AFFAIRS 1911 JOHNSON AVENUE SAN LUIS OBISPO, CA 93401	20-3256125	501(C)(3)	15,000		-	N/A	TO SUPPORT EMERGENCY ROOM RENOVATIONS
FRESH START 907 HATCHER LANE COLUMBIA, TN 38401	47-5304890		15,000		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COMMUNITY ACTION PARTNERSHIP OF SAN LUIS OBISPO COUNTY 1030 SOUTHWOOD DRIVE SAN LUIS OBISPO, CA 93401	95-2410253	501(C)(3)	15,000		-	N/A	"DREAM IT, BE IT" PROGRAM TO INCREASE POSITIVE IDENTITY ASSETS IN GIRLS
SAN LUIS COASTAL SCHOOL DIST 1500 LIZZIE STREET SAN LUIS OBISPO, CA 93401		GOVERNMENT	14,545		-	N/A	MINI-GRANT WINTER 2016
RISE POBOX 630 PASO ROBLES, CA 93447	77-0068977	501(C)(3)	14,000		-	N/A	\$7,000 FOR THERAPY PROGRAMS FOR SURVIVORS, \$7,000 FOR EMERGENCY FAMILY SERVICES AND SURVIVORS OF INTIMATE PARTNER VIOLENCE

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FIVE CITIES HOMELESS COALITION PO BOX 558 GROVER BEACH, CA 934830558	27-0413593	501(C)(3)	13,500		-	N/A	RAPID RE-HOUSING PROGRAM
FRENCH HOSPITAL MEDICAL CENTER FOUNDATION AND PUBLIC AFFAIRS 1911 JOHNSON AVENUE SAN LUIS OBISPO, CA 93401	20-3256125	501(C)(3)	12,844		-	N/A	HEART DISEASE CARE AND TREATMENT
ALPHA PREGNANCY & PARENTING SUPPORT 11549 LOS OSOS VALLEY ROAD STE 104 SAN LUIS OBISPO, CA 93405	95-3570504	501(C)(3)	12,000		-	N/A	STABLE AND SAFE HOUSING

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SCRIPPS RESEARCH INSTITUTE 10550 NORTH TORREY PINES ROAD TPC-2 TPC-2 LA JOLLA, CA 92037	33-0435954	501(C)(3)	10,703		-	N/A	STEM CELL RESEARCH
WILLIAM SANSUM DIABETES RESEARCH CENTER 2219 BATH ST SANTA BARBARA, CA 93105		501(C)(3)	10,703		-	N/A	UNRESTRICTED
NORTHERN CALIFORNIA INSTITUTE FOR RESEARCH & EDUCATION 4150 CLEMENT STREET 151NC SAN FRANCISCO, CA 941211545	94-3084159	501(C)(3)	10,703		-	N/A	PARKINSON'S DISEASE RESEARCH

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UCLA DEPARTMENT OF NEUROLOGY - MARY S EASTON CENTER FOR ALZHEIMER'S RESEAR 710 WESTWOOD BOULEVARD SUITE C153 LOS ANGELES, CA 90095		GOVERNMENT	10,703		-	N/A	ALZHEIMER'S RESEARCH
ST JUDE MEMORIAL FOUNDATION 1440 N HARBOR BLVD SUITE 200 FULLERTON, CA 92835	95-1643325	501(C)(3)	10,703		-	N/A	UNRESTRICTED
SLO MUSEUM OF ART (SLOMA) PO BOX 813 SAN LUIS OBISPO, CA 93406	95-6134270	501(C)(3)	10,703		-	N/A	CAPITAL IMPROVEMENTS

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PEOPLES' SELF-HELP HOUSING 3533 EMPLEO STREET SAN LUIS OBISPO, CA 93401	95-2750154	501(C)(3)	10,000		-	N/A	SUPPORTIVE HOUSING PROGRAM
SOUTH COUNTY YOUTH COALITION PO BOX 371 ARROYO GRANDE, CA 93421	77-0495870	501(C)(3)	10,000		-	N/A	THRIVE FUND
EL CAMINO HOMELESS ORGANIZATION PO BOX 2077 ATASCADERO, CA 93423	77-0545434	501(C)(3)	10,000		-	N/A	TACKLING THE BARRIERS

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ONE COOL EARTH PO BOX 150 SAN LUIS OBISPO, CA 93406	34-1930404	501(C)(3)	10,000		-	N/A	GIRL CIRCLE
ELINGS PARK FOUNDATION 1298 LAS POSITAS ROAD SANTA BARBARA, CA 93105	95-3500475	501(C)(3)	10,000		-	N/A	UNRESTRICTED
CENTRAL COAST LINK DBA THE LINK 6500 MORRO ROAD SUITE A ATASCADERO, CA 93422	91-2022036	501(C)(3)	10,000		-	N/A	CRISIS INTERVENTION - ATASCADERO FAMILY RESOURCE CENTER

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COMMUNITY ACTION PARTNERSHIP OF SAN LUIS OBISPO COUNTY 1030 SOUTHWOOD DRIVE SAN LUIS OBISPO, CA 93401	95-2410253	501(C)(3)	10,000		-	N/A	MIGRANT AND SEASONAL HEAD START (MSHS) PROGRAM
5 CITIES COMMUNITY SERVICE FOUNDATION PO BOX 558 GROVER BEACH, CA 93483			10,000		-	N/A	5CITIES HOMELESS COALITION
PATHPOINT 11491 LOS OSOS VALLEY RD SAN LUIS OBISPO, CA 93405	95-2371668		10,000		-	N/A	PROJECT SEARCH

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FOOD BANK COALITION OF SAN LUIS OBISPO COUNTY 1180 KENDALL ROAD SAN LUIS OBISPO, CA 93401	77-0210727	501(C)(3)	10,000		-	N/A	\$5,000 TO SUPPORT THE SENIORS FARMERS MARKET, AND \$5,000 TO SUPPORT THE CHILDREN'S FARMERS MARKET
BOYS & GIRLS CLUB OF NORTH SLO COUNTY PO BOX 3037 PASO ROBLES, CA 93447	77-0272094	501(C)(3)	10,000		-	N/A	TO SUPPORT THE SMART GIRLS PROGRAM
JODI HOUSE INC 625 CHAPALA ST SANTA BARBARA, CA 93101	95-3836137		10,000		-	N/A	BRAIN INJURY SUPPORT

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CENTRAL COAST WILDLIFE REHABILITATION GUILD DBA PACIFIC WILDLIFE CARE POST OFFICE BOX 1134 MORRO BAY, CA 93443	77-0196350	501(C)(3)	10,000		-	N/A	UNRESTRICTED
SLO LITTLE THEATRE INC PO BOX 122 SAN LUIS OBISPO, CA 93406	95-2556678	501(C)(3)	10,000		-	N/A	SERVICE COSTUME SHOPS
FOOD BANK COALITION OF SAN LUIS OBISPO COUNTY 1180 KENDALL ROAD SAN LUIS OBISPO, CA 93401	77-0210727	501(C)(3)	10,000		-	N/A	THE CHILDREN'S FARMERS MARKET PROGRAM

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TRANSITIONAL FOOD AND SHELTER INC PO BOX 4471 PASO ROBLES, CA 93447	77-0489535	501(C)(3)	10,000		-	N/A	REQUEST FUNDS
PEOPLES' SELF-HELP HOUSING 3533 EMPLEO STREET SAN LUIS OBISPO, CA 93401	95-2750154	501(C)(3)	10,000		-	N/A	LOW-INCOME AND SPECIAL NEEDS HOUSING PLACEMENT AND STABILIZATION
COMMUNITY ACTION PARTNERSHIP OF SAN LUIS OBISPO COUNTY 1030 SOUTHWOOD DRIVE SAN LUIS OBISPO, CA 93401	95-2410253	501(C)(3)	10,000		-	N/A	HOMELESS SERVICES CASE MANAGEMENT AND PAPAS OF THE CENTRAL COAST

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FRIENDS OF PRADO DAY CENTER PO BOX 12444 SAN LUIS OBISPO, CA 93406	77-0540323	501(C)(3)	10,000		-	N/A	TO SUPPORT THE BUILDING CAMPAIGN
FOUNDATION FOR THE PERFORMING ARTS CENTER PO BOX 1137 SAN LUIS OBISPO, CA 93406	77-0129605	501(C)(3)	10,000		-	N/A	SCHOOL MATINEE PROGRAM
SAN LUIS OBISPO SYMPHONY INC PO BOX 658 SAN LUIS OBISPO, CA 93406	95-2493144	501(C)(3)	10,000		-	N/A	CADET WINDS

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PASO ROBLES YOUTH ARTS FOUNDATION POST OFFICE BOX 4699 PASO ROBLES, CA 93447	77-0488880		10,000		-	N/A	FREE VISUAL AND PERFORMING ARTS INSTRUCTION
PLACE OF HOPE INC 105 JAMES NORTH CAMPBELL BLVD COLUMBIA, TN 38401		501(C)(3)	10,000			N/A	UNRESTRICTED
FOOD BANK COALITION OF SAN LUIS OBISPO COUNTY 1180 KENDALL ROAD SAN LUIS OBISPO, CA 93401	77-0210727	501(C)(3)	9,800		-	N/A	THE CHILDREN'S FARMERS MARKET PROGRAM

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY PO BOX 1444 SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	9,000		-	N/A	HOMELESS SHELTER CAPITAL CAMPAIGN
HISTORY CENTER OF SAN LUIS OBISPO COUNTY 696 MONTEREY STREET SAN LUIS OBISPO, CA 93401	95-6150680	501(C)(3)	9,000		-	N/A	COUNTYWIDE HISTORY TOUR COOPERATIVE
SHRINERS HOSPITAL FOR CHILDREN PO BOX 31356 TAMPA, FL 33631	04-2121399	501(C)(3)	8,563		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SAN LUIS OBISPO CHILD DEVELOPMENT CENTER DBA CHILD DEVELOPMENT RESOURCE CEN 1720 BISHOP STREET SAN LUIS OBISPO, CA 93401	23-7111804	501(C)(3)	8,500		-	N/A	SLO FAMILY RESOURCE CENTER
SAN LUIS OBISPO CHILD DEVELOPMENT CENTER DBA CHILD DEVELOPMENT RESOURCE CEN 1720 BISHOP STREET SAN LUIS OBISPO, CA 93401	23-7111804	501(C)(3)	8,500		-	N/A	FAMILY RESOURCE CENTER - LOS OSOS, MORRO BAY, CAYUCOS
COMMUNITY ACTION PARTNERSHIP OF SAN LUIS OBISPO COUNTY 1030 SOUTHWOOD DRIVE SAN LUIS OBISPO, CA 93401	95-2410253	501(C)(3)	8,500		-	N/A	ADULT WELLNESS AND PREVENTION SCREENING PROGRAM

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TOLOSA CHILDREN'S DENTAL CENTER PARTNERSHIP FOR THE CHILDREN OF SLO COUNTY 717 WALNUT DRIVE PASO ROBLES, CA 93446	77-0346861	501(C)(3)	8,500		-	N/A	TOLOSA CHILDREN'S DENTAL CENTER
THE SALVATION ARMY 1550 WEST BRANCH STREET ARROYO GRANDE, CA 93420	94-1156347	501(C)(3)	8,450		-	N/A	CHIMNET FIRE RELIEF AND FUTURE DISASTER PLANNING
CENTER FOR FAMILY STRENGTHENING (FORMERLY SLO-CAP) 1110 CALIFORNIA BLVD B SAN LUIS OBISPO, CA 93401	77-0206822	501(C)(3)	8,000		-	N/A	PREMATURE INFANTS' BREASTFEEDING PROGRAM

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COLUMBIA FIRST UNITED METHODIST CHURCH 222 WEST 7TH STREET COLUMBIA, TN 38401		RELIGIOUS	8,000		-	N/A	UNRESTRICTED
TRANSITIONS-MENTAL HEALTH ASSOCIATION 784 HIGH STREET SAN LUIS OBISPO, CA 93401	95-3509040	501(C)(3)	8,000		-	N/A	SLO HOTLINE
CENTRAL COAST LINK DBA THE LINK 6500 MORRO ROAD SUITE A ATASCADERO, CA 93422	91-2022036	501(C)(3)	8,000		-	N/A	CLIENT CASES MANAGEMENT DATABASE

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CAL POLY CORPORATION 1 GRAND AVENUE BLDG 15 SAN LUIS OBISPO, CA 934070035	95-1648180	501(C)(3)	8,000		-	N/A	\$5,000 TO SUPPORT THE NEW VETERINARY FUND, AND \$3,000 AS CAPITAL FOR NEW CAGES
GROVER BEACH COMMUNITY LIBRARY 240 N 9TH STREET GROVER BEACH, CA 93433	43-2024995	501(C)(3)	7,688		-	N/A	ANNUAL DISTRIBUTION FOR OPERATIONS
CLARK CENTER FOUNDATION PO BOX 1114 ARROYO GRANDE, CA 93421	77-0150216	501(C)(3)	7,688		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SAN LUIS OBISPO SYMPHONY INC PO BOX 658 SAN LUIS OBISPO, CA 93406	95-2493144	501(C)(3)	7,688		-	N/A	TO SUPPORT THE SLO YOUTH SYMPHONY
WOODS HUMANE SOCIETY 875 OKLAHOMA AVE SAN LUIS OBISPO, CA 93405	95-2058587	501(C)(3)	7,688		-	N/A	SHELTER SERVICES FOR CATS
HOSPICE PARTNERS OF THE CENTRAL COAST DBA WILSHIRE HOSPICE 277 SOUTH STREET STE R SAN LUIS OBISPO, CA 93401	77-0475425	501(C)(3)	7,688		-	N/A	ANNUAL DISTRIBUTION FOR OPERATIONS

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CUESTA COLLEGE FOUNDATION P O BOX 8106 SAN LUIS OBISPO, CA 934038106	23-7225601	501(C)(3)	7,688		-	N/A	JEANNE L & ELLERY J CONLEY NURSING SCHOLARSHIP
SAN LUIS OBISPO LEGAL ASSISTANCE FOUNDATION 1011 PACIFIC ST SUITE B SAN LUIS OBISPO, CA 93401	77-0335048	501(C)(3)	7,500		-	N/A	OUTREACH PROGRAM
CASA SOLANA INC 383 S THIRTEENTH STREET GROVER BEACH, CA 93433	95-3751698		7,000		-	N/A	GIFT BEDS

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TRANSITIONAL FOOD AND SHELTER INC PO BOX 4471 PASO ROBLES, CA 93447	77-0489535	501(C)(3)	7,000		-	N/A	TRANSITIONAL FOOD AND SHELTER
CENTRAL COAST LINK DBA THE LINK 6500 MORRO ROAD SUITE A ATASCADERO, CA 93422	91-2022036	501(C)(3)	7,000		-	N/A	CRISIS INTERVENTION PROGRAM - PASO ROBLES FAMILY RESOURCE
ONE COOL EARTH PO BOX 150 SAN LUIS OBISPO, CA 93406	34-1930404	501(C)(3)	7,000		-	N/A	WATER CONSERVATION FUNDING

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SOUTH COUNTY EDUCATION FOUNDATION POST OFFICE BOX 222 ARROYO GRANDE, CA 934210222	77-0020195	501(C)(3)	7,000		-	N/A	ANNUAL DISTRIBUTION FOR GRANTS IN ARTS AND SCIENCES TO GRADES 1-6 AND GRADES 7-12
SLO COUNTY YMCA 1020 SOUTHWOOD DRIVE SAN LUIS OBISPO, CA 93401	95-2147727	501(C)(3)	6,500		-	N/A	HEALTHY EATING AND PHYSICAL ACTIVITY CURRICULUM (HEPA) IN YMCA AFTERSCHOOL PROGRAMS
BRAILLE INSTITUTE OF AMERICA 741 NORTH VERMONT AVENUE LOS ANGELES, CA 90029	95-1641426	501(C)(3)	6,422		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CAL POLY FOUNDATION I GRAND AVE HERON HALL SAN LUIS OBISPO, CA 93407	20-4927897	501(C)(3)	6,422		-	N/A	VOCAL MUSIC SCHOLARSHIP
ACCESS SUPPORT NETWORK SLO & MONTEREY COUNTIES (FORMERLY AIDS SUPPORT NETWO PO BOX 12158 SAN LUIS OBISPO, CA 93406	77-0205717	501(C)(3)	6,000		-	N/A	SAN LUIS OBISPO SYRINGE EXCHANGE PROGRAM (SLOSEP)
SAN LUIS OBISPO VOCAL ARTS ENSEMBLE PO BOX 4306 SAN LUIS OBISPO, CA 93403	95-3370761	501(C)(3)	6,000		-	N/A	2017 SPRING SCHOOL CHORAL FESTIVAL

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SANTA MARIA VALLEY SENIOR CITIZEN'S CLUB 510 E PARK SANTA MARIA, CA 93454	77-0111371		6,000		-	N/A	SENIOR GROUP DANCES
BASIN STREET REGULARS-CENTRAL COAST HOT JAZZ SOCIETY PO BOX 356 PISMO BEACH, CA 93448	95-3214113		6,000		-	N/A	SUNDAY SESSIONS OF BASIN STREET REGULARS
RISE POBOX 630 PASO ROBLES, CA 93447	77-0068977	501(C)(3)	6,000		-	N/A	SHELTER PROGRAM

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
MONTEREY RIDGE ELEMENTARY SCHOOL 17117 4S RANCH PARKWAY SAN DIEGO, CA 921278853		GOVERNMENT	6,000		-	N/A	JULES TRANDEM CLASS EXPERIENCES
SLO COUNTY PUBLIC HEALTH DEPARTMENT 2180 JOHNSON AVENUE SAN LUIS OBISPO, CA 93401			5,535		-	N/A	10TH ANNIVERSARY HEAL-SLO SUMMIT
FRIENDS OF THE SAN LUIS OBISPO BOTANICAL GARDENS 3450 DAIRY CREEK ROAD SAN LUIS OBISPO, CA 93405	77-0248682	501(C)(3)	5,248		-	N/A	OPERATIONS ANNUAL DISBURSEMENT

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY PO BOX 1444 SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	5,000		-	N/A	40 PRADO PROJECT
FRIENDS OF PRADO DAY CENTER PO BOX 12444 SAN LUIS OBISPO, CA 93406	77-0540323	501(C)(3)	5,000		-	N/A	PREFERENCE IS TO SUPPORT THE WARMING SHELTER, HOWEVER THE FUNDS MAY BE USED FOR IMMEDIATE NEEDS, AS LONG AS THE FUNDS ARE USED FOR OPERATUNG FUNDS AND NOT FOR THE CAPITAL CAMPAIGN
RESTORATIVE PARTNERS INC (RP) 4251 S HIGUERA ST ST 102 SAN LUIS OBISPO, CA 93401			5,000		-	N/A	JUVENILE HALL TREATMENT CENTER GARDEN PROJECT

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CASACOURT APPOINTED SPECIAL ADVOCATES OF SLO COUNTY 75 HIGUERA ST 180 SAN LUIS OBISPO, CA 93401	77-0316227	501(C)(3)	5,000		-	N/A	CASA'S INFANT/TODDLER PROGRAM
CHRIS JESPERSEN MEMORIAL SOCIETY 3350 EDUCATION DRIVE SAN LUIS OBISPO, CA 93405		501(C)(3)	5,000		-	N/A	UNRESTRICTED GIFT
LEADERSHIP SLO FOUNDATION INC 895 MONTEREY SAN LUIS OBISPO, CA 93401	77-0417076	501(C)(3)	5,000		-	N/A	LEADERSHIP SLO

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
NCI AFFILIATES INC 1434 CHESTNUT STREET PASO ROBLES, CA 93446	95-3445094		5,000		-	N/A	UNRESTRICTED
FOUNDATION FOR THE PERFORMING ARTS CENTER PO BOX 1137 SAN LUIS OBISPO, CA 93406	77-0129605	501(C)(3)	5,000		-	N/A	UNRESTRICTED
CAYUCOS LAND CONSERVANCY PO BOX 336 CAYUCOS, CA 93430	77-0506896	501(C)(3)	5,000		-	N/A	HILLSIDE LOTS

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TRANSITIONS-MENTAL HEALTH ASSOCIATION 784 HIGH STREET SAN LUIS OBISPO, CA 93401	95-3509040	501(C)(3)	5,000		-	N/A	BISHOP STREET STUDIOS CAPITAL CAMPAIGN
COLUMBIA COUNSELING MINISTRIES 5001 TROTWOOD AVENUE COLUMBIA, TN 38401	30-0604415	501(C)(3)	5,000		-	N/A	UNRESTRICTED
COLUMBIA COUNSELING MINISTRIES 5001 TROTWOOD AVENUE COLUMBIA, TN 38401	30-0604415	501(C)(3)	5,000		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
MAURY MAGIC RIDERS INC PO BOX 560 COLUMBIA, TN 38402	62-1742129	501(C)(3)	5,000		-	N/A	UNRESTRICTED
WHITMAN COLLEGE OFFICE OF ANNUAL GIVING 345 BOYER AVE WALLA WALLA, WA 99362	91-0567740	501(C)(3)	5,000		-	N/A	UNRESTRICTED
BOY SCOUTS OF AMERICA - MIDDLE TENNESSEE COUNCIL 908 CREEKVIEW DRIVE COLUMBIA, TN 38401	62-0477729		5,000		-	N/A	STEM SCOUTS PROGRAM (SCIENCE, TECHNOLOGY, ENGINEERING, AND MATH)

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CENTRAL COAST COMMISSION FOR SENIOR CITIZENS 528 S BROADWAY SANTA MARIA, CA 93454			5,000		-	N/A	VIAL OF LIFE PROGRAM
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY PO BOX 1444 SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	5,000		-	N/A	UNRESTRICTED
COMMUNITY COUNSELING CENTER OF SAN LUIS OBISPO COUNTY (CCC) 1129 MARSH STREET SAN LUIS OBISPO, CA 93401	95-2906369	501(C)(3)	5,000		-	N/A	AFFORDABLE PSYCOTHERAPHY

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COMMUNITY FOUNDATION OF ESTERO BAY (FORMERLY MORRO BAY COMMUNITY FOUNDATION PO BOX 131 MORRO BAY, CA 93443	77-0336404	501(C)(3)	5,000		-	N/A	UNRESTRICTED
TRANSITIONS-MENTAL HEALTH ASSOCIATION 784 HIGH STREET SAN LUIS OBISPO, CA 93401	95-3509040	501(C)(3)	5,000		-	N/A	UNRESTRICTED
GLOBAL GLIMPSE 101 BROADWAY SUITE 301 OAKLAND, CA 94607	26-0651273	501(C)(3)	5,000		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FRENCH HOSPITAL MEDICAL CENTER FOUNDATION AND PUBLIC AFFAIRS 1911 JOHNSON AVENUE SAN LUIS OBISPO, CA 93401	20-3256125	501(C)(3)	5,000		-	N/A	UNRESTRICTED
FIRST UNITED METHODIST CHURCH 200 WEST MAIN STREET MCMINNVILLE, TN 37110			5,000		-	N/A	UNRESTRICTED
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY PO BOX 1444 SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	5,000		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY PO BOX 1444 SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	5,000		-	N/A	UNRESTRICTED
VOICES AGAINST BRAIN CANCER 1441 BROADWAY 3025 NEW YORK, NY 10018	20-2872778	501(C)(3)	5,000		-	N/A	TO SUPPORT JOIN THE VOICES' SAN FRANCISCO RUN/WALK IN GOLDEN GATE PARK ON SUNDAY, NOVEMBER 6, 2016 FOR DOREE O'CONNELL
MOVING TRAIN INC PO BOX 3033 LOS ALTOS, CA 94024	80-0376076	501(C)(3)	5,000		-	N/A	JOURNEY TO ROYAL

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
STANFORD UNIVERSITY 326 GLAVEZ STREET STANFORD, CA 94305			5,000		-	N/A	CANCER DISCOVERY FUND
CENTRAL COAST PERFORMING ARTS CENTER COMMISSION 1 GRAND AVENUE SAN LUIS OBISPO, CA 93401	77-0408837	501(C)(3)	5,000		-	N/A	OPERATING COSTS
ETHOS YOUTH ENSEMBLES PO BOX 332255 MURFREESBORO, TN 37133	62-1691655		5,000		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ASSISTANCE LEAGUE OF SAN LUIS OBISPO COUNTY PO BOX 14904 SAN LUIS OBISPO, CA 93406	77-0337378	501(C)(3)	5,000		-	N/A	OPERATION SCHOOL BELL
LES FELDICK MINISTRIES 30706 W LONA VALLEY ROAD KINTA, OK 74552	73-1387441	501(C)(3)	5,000		-	N/A	UNRESTRICTED

Form 990, Schedule I, Part III, Grants and Other Assistance to Domestic Individuals.					
(a)Type of grant or assistance	(b)Number of recipients	(c)Amount of cash grant	(d)Amount of non-cash assistance	(e)Method of valuation (book, FMV, appraisal, other)	(f)Description of non-cash assistance
2015 DOROTHY ROSS MEMORIAL SCHOLARSHIP	1	-500	0	N/A	N/A
2015 KELLY A MCADAMS SCHOLARSHIP	2	0	0	N/A	N/A
2015 PRHS CLASS OF 55' SCHOLARSHIP	1	1,725	0	N/A	N/A
2015 RICHARD J WEYHRICH LEADERSHIP	1	-4,000	0	N/A	N/A
2015 RICHARD J WEYHRICH LEADERSHIP AWARD	1	4,000	0	N/A	N/A
2016 DOROTHY ROSS MEMORIAL SCHOLARSHIP	1	1,000	0	N/A	N/A
2016 JOHN AND YVONNE HSU EDMISTEN IN HONOR OF VOIGT SCHOLARSHIP	1	2,500	0	N/A	N/A
2016 AIACCC AWARD	4	1,500	0	N/A	N/A
2016 ALAN D STEPHENSON SCHOLARSHIP	1	10,000	0	N/A	N/A
2016 ALEX MADONNA MEMORIAL AWARD	1	2,000	0	N/A	N/A
2016 ALFRED I , CATHARINE J AND ELEANOR G SWITZER SCHOLARSHIP	1	16,000	0	N/A	N/A
2016 BRIAN WATERBURY MEMORIAL SCHOLARSHIP	1	2,000	0	N/A	N/A
2016 BURT W POLIN AND VIRGINIA POLIN "ELKS" SCHOLARSHIP	1	2,000	0	N/A	N/A
2016 DAVID B GIANAS MEMORIAL SCHOLARSHIP	7	6,750	0	N/A	N/A
2016 DENNIS T COLLINS & THOMAS D SALISBURY TROOP 60 EAGLE SCOUT SCHOLARSHIP	1	1,500	0	N/A	N/A

Form 990, Schedule I, Part III, Grants and Other Assistance to Domestic Individuals.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
2016 DON FLOYD MEMORIAL SCHOLARSHIP	5	5,000	0	N/A	N/A
2016 DOROTHY ROSS MEMORIAL SCHOLARSHIP	1	1,000	0	N/A	N/A
2016 DOUGLAS DEGROSS SCHOLARSHIP FOR AUTOMOTIVE STUDIES	1	2,000	0	N/A	N/A
2016 ELKAN T HART SCHOLARSHIP	1	10,000	0	N/A	N/A
2016 GARY GROSSMAN SCHOLARSHIP	1	2,000	0	N/A	N/A
2016 GARY GROSSMAN SCHOLARSHIP FUND	1	3,000	0	N/A	N/A
2016 GUY, LORINE AND AMANDA PREWITT SCHOLARSHIP	1	2,500	0	N/A	N/A
2016 HELEN AND RONALD DUNIN MEMORIAL SCHOLARSHIP	2	10,000	0	N/A	N/A
2016 IAN PURDON MEMORIAL SCHOLARSHIP	1	1,000	0	N/A	N/A
2016 JENNIFER THOMA MEMORIAL BALLET SCHOLARSHIP	1	2,500	0	N/A	N/A
2016 JUSTIN MCCUTCHEON MEMORIAL SCHOLARSHIP	1	1,000	0	N/A	N/A
2016 KELLY A MCADAMS SCHOLARSHIP	1	10,000	0	N/A	N/A
2016 KIWANIS SLO DE TOLOSA SCHOLARSHIP	1	2,500	0	N/A	N/A
2016 LAUREN TIPTON SLAUGHTER SCHOLARSHIP	1	1,000	0	N/A	N/A
2016 MARY JO AND HENRY DESIO SPECIAL EDUCATION	1	2,106	0	N/A	N/A

Form 990, Schedule I, Part III, Grants and Other Assistance to Domestic Individuals.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
2016 RICHARD K SAURET VITCULTURE AND ENOLOGY SCHOLARSHIP	1	12,000	0	N/A	N/A
2016 RICHARD K WEYHRICH LEADERSHIP AWARD	10	40,000	0	N/A	N/A
2016 SERA DAY CORYELL NURSING EDUCATION SCHOLARSHIP	1	8,000	0	N/A	N/A
2016 SPIRIT OF THE CLASS OF '49 SCHOLARSHIP	1	500	0	N/A	N/A
2016 STEPHEN DONNELLAN MOSS MEMORIAL SCHOLARSHIP	1	1,500	0	N/A	N/A
2016 YEAGER SCIENCE SCHOLARSHIP	1	23,000	0	N/A	N/A
DENNIS T COLLINS & THOMAS D SALISBURY TROOP 60 EAGLE SCOUT SCHOLARSHIP	1	1,000	0	N/A	N/A
GERMAN SCHOOL PASS THROUGH FUND	1	3,700	0	N/A	N/A
PASO ROBLES HIGH SCHOOL CLASS OF '55	1	-1,725	0	N/A	N/A
RICHARD K WEYHRICH LEADERSHIP FUND	1	4,000	0	N/A	N/A

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

►Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
► Attach to Form 990.
►Information about Schedule M (Form 990) and its instructions is at www.irs.gov/form990

OMB No 1545-0047

2016

Open to Public Inspection

Name of the organization
THE COMMUNITY FOUNDATION SAN LUIS OBISPO
COUNTY

Employer identification number
77-0496500

Part I

Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded	X	19	261,901	ACTIVE MARKET PRICE
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution—Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ► (<u>EVENT SUPPLIES</u>)	X	7	1,165	FAIR VALUE
26 Other ► (<u> </u>)				
27 Other ► (<u> </u>)				
28 Other ► (<u> </u>)				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement

29

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?

30a

No

b If "Yes," describe the arrangement in Part II

31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

31

Yes

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

32a

Yes

b If "Yes," describe in Part II

33 If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II

Part II **Supplemental Information.**

Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Return Reference	Explanation
PART I, LINE 32B	THE FOUNDATION MAINTAINS BROKERAGE ACCOUNTS TO ENABLE DONORS TO TRANSFER STOCK THE GIFTS OF STOCK ARE THEN SOLD AND THE PROCEEDS DEPOSITED INTO THE FOUNDATION'S ACCOUNTS

SCHEDULE O
(Form 990 or 990-EZ)Department of the Treasury
Internal Revenue ServiceName of the organization
THE COMMUNITY FOUNDATION SAN LUIS OBISPO
COUNTY**Supplemental Information to Form 990 or 990-EZ**Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at
www.irs.gov/form990.

OMB No 1545-0047

2016**Open to Public
Inspection****Employer identification number**

77-0496500

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 11B	FORM 990 REVIEW PROCESS FOUNDATION'S DIRECTOR OF FINANCE & ADMINISTRATION, CHIEF EXECUTIVE OFFICER, AUDIT COMMITTEE AND BOARD OF DIRECTORS REVIEW TAX RETURN PRIOR TO FILING

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 12C	EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICT OF INTEREST POLICY EACH EMPLOYEE, BOARD MEMBER, GRANT/SCHOLARSHIP REVIEWER, AND ALL COMMITTEE MEMBERS COMPLETES AND SIGNS A WRITTEN CONFLICT OF INTEREST DISCLOSURE DOCUMENT ANNUALLY

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 15	COMPENSATION REVIEW & APPROVAL PROCESS FOR OFFICERS & KEY EMPLOYEES THE FULL BOARD PERIODI CALLY CONDUCTS A FORMAL REVIEW PROCESS FOR THE CHIEF EXECUTIVE OFFICER AND ALSO REVIEWS SA LARY AND AGREES ON ANY SALARY ADJUSTMENTS

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION C, LINE 19	OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE A PUBLIC DISCLOSURE COPY OF THE ORGANIZATION'S BYLAWS, POLICIES, AND AUDITED FINANCIAL STATEMENTS ARE AVAILABLE ON THE ORGANIZATION'S WEBSITE, ON GUIDESTAR ORG AND UPON REQUEST

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART XI, LINE 9	DISTRIBUTION TO THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY FROM SUPPORTING ORGANIZATION 135,166

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART XI, LINE 2C, FINANCIAL STATEMENTS AND REPORTING	THE OVERSIGHT PROCESS BY THE AUDIT COMMITTEE DID NOT CHANGE THIS YEAR

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.▶ Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2016

Open to Public Inspection

Name of the organization
THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY

Employer identification number
77-0496500

Part I Identification of Disregarded Entities Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II Identification of Related Tax-Exempt Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1)REAL ESTATE FOUNDATION OF SAN LUIS OBISPO COUNTY 550 DANA STREET SAN LUIS OBISPO, CA 93401 80-0383894	SUPPORTING ORGANIZATION - CONDUCTING ACTIVITIES FOR THE BENEFIT OF CFSLOCO	CA	501(C) (3)	PUBLIC CHARITY - TYP	THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY	Yes	

Part III Identification of Related Organizations Taxable as a Partnership Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512- 514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV Identification of Related Organizations Taxable as a Corporation or Trust Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of- year assets	(h) Percentage ownership	(i) Section 512(b) (13) controlled entity?	
								Yes	No

Part V Transactions With Related Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity		No
b Gift, grant, or capital contribution to related organization(s)		No
c Gift, grant, or capital contribution from related organization(s)	Yes	
d Loans or loan guarantees to or for related organization(s)		No
e Loans or loan guarantees by related organization(s)		No
f Dividends from related organization(s)		No
g Sale of assets to related organization(s)		No
h Purchase of assets from related organization(s)		No
i Exchange of assets with related organization(s)		No
j Lease of facilities, equipment, or other assets to related organization(s)		No
k Lease of facilities, equipment, or other assets from related organization(s)		No
l Performance of services or membership or fundraising solicitations for related organization(s)	Yes	
m Performance of services or membership or fundraising solicitations by related organization(s)		No
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	Yes	
o Sharing of paid employees with related organization(s)	Yes	
p Reimbursement paid to related organization(s) for expenses		No
q Reimbursement paid by related organization(s) for expenses		No
r Other transfer of cash or property to related organization(s)	Yes	
s Other transfer of cash or property from related organization(s)		No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) REAL ESTATE FOUNDATION OF SAN LUIS OBISPO COUNTY	C	135,166	FMV
(2) REAL ESTATE FOUNDATION OF SAN LUIS OBISPO COUNTY	R	22,000	FMV

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

[illegible]

Part VII **Supplemental Information**

Provide additional information for responses to questions on Schedule R (see instructions)

Return Reference	Explanation
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