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PUBLIC DISCLOSURE COPY

Form **990**

Department of the Treasury  
Internal Revenue Service

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

**2016**

Open to Public Inspection

▶ 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](http://www.irs.gov/form990).

**A For the 2016 calendar year, or tax year beginning and ending**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY</b>		<b>D</b> Employer identification number <b>77-0496500</b>
	Doing business as		<b>E</b> Telephone number <b>805-543-2323</b>
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	<b>550 DANA STREET</b>		<b>G</b> Gross receipts \$ <b>24,387,385.</b>
	City or town, state or province, country, and ZIP or foreign postal code <b>SAN LUIS OBISPO, CA 93401</b>		
<b>F</b> Name and address of principal officer: <b>HEIDI MCPHERSON</b> <b>SAME AS C ABOVE</b>		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions)	
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(c)</b> Group exemption number ▶	
<b>J</b> Website: ▶ <b>WWW.CFSLOCO.ORG</b>		<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶	
		<b>L</b> Year of formation: <b>1998</b>	<b>M</b> State of legal domicile: <b>CA</b>

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>SEE SCHEDULE O.</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>15</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>15</b>
	<b>5</b> Total number of individuals employed in calendar year 2016 (Part V, line 2a)	<b>5</b>	<b>9</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>100</b>
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, line 34	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	<b>5,650,351.</b>	<b>3,302,013.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>0.</b>	<b>0.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>1,576,453.</b>	<b>1,786,214.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>45,692.</b>	<b>-181,867.</b>
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>7,272,496.</b>	<b>4,906,360.</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	<b>2,461,421.</b>	<b>2,148,335.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>0.</b>	<b>0.</b>
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	<b>479,542.</b>	<b>539,242.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>150,921.</b>	<b>0.</b>	<b>0.</b>
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>240,049.</b>	<b>515,669.</b>
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>3,181,012.</b>	<b>3,203,246.</b>
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>4,091,484.</b>	<b>1,703,114.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>21</b> Total liabilities (Part X, line 26)	<b>49,477,305.</b>	<b>52,804,715.</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>4,822,359.</b>	<b>5,036,367.</b>
		<b>44,654,946.</b>	<b>47,768,348.</b>

**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.

<b>Sign Here</b>	Signature of officer		Date
	<b>HEIDI MCPHERSON, CHIEF EXECUTIVE OFFICER</b> Type or print name and title		
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date
	<b>KIMBERLYN SPILLER</b>		
	Firm's name ▶ <b>CALIBER AUDIT &amp; ATTEST, LLP</b>	Firm's EIN ▶ <b>26-2350873</b>	Check if self-employed <input type="checkbox"/> PTIN <b>P01491937</b>
	Firm's address ▶ <b>265 SOUTH STREET, SUITE A</b> <b>SAN LUIS OBISPO, CA 93401</b>	Phone no. <b>805-888-0240</b>	

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

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

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

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

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
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i> .....	X	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors?</i> .....	X	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i> .....		X
<b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> .....		X
<b>5</b> 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? <i>If "Yes," complete Schedule C, Part III</i> .....		X
<b>6</b> 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? <i>If "Yes," complete Schedule D, Part I</i> .....	X	
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i> .....		X
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i> .....		X
<b>9</b> 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? <i>If "Yes," complete Schedule D, Part IV</i> .....	X	
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i> .....	X	
<b>11</b> 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.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i> .....	X	
<b>b</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? <i>If "Yes," complete Schedule D, Part VII</i> .....	X	
<b>c</b> 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? <i>If "Yes," complete Schedule D, Part VIII</i> .....		X
<b>d</b> 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? <i>If "Yes," complete Schedule D, Part IX</i> .....		X
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> .....	X	
<b>f</b> 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)? <i>If "Yes," complete Schedule D, Part X</i> .....	X	
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i> .....		X
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> .....	X	
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i> .....		X
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? .....		X
<b>b</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? <i>If "Yes," complete Schedule F, Parts I and IV</i> .....		X
<b>15</b> 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? <i>If "Yes," complete Schedule F, Parts II and IV</i> .....		X
<b>16</b> 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? <i>If "Yes," complete Schedule F, Parts III and IV</i> .....		X
<b>17</b> 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? <i>If "Yes," complete Schedule G, Part I</i> .....		X
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i> .....	X	
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i> .....		X

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
COUNTY

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**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> .....		X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? .....		
<b>21</b> 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> .....	X	
<b>22</b> 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> .....	X	
<b>23</b> 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> .....		X
<b>24a</b> 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> .....		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....		
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> 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> .....		X
<b>b</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> .....		X
<b>26</b> 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> .....		X
<b>27</b> 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> .....		X
<b>28</b> 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):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....		X
<b>c</b> 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> .....		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....	X	
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....		X
<b>32</b> 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> .....		X
<b>33</b> 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> .....		X
<b>34</b> 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> .....	X	
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....	X	
<b>b</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> .....	X	
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....		X
<b>37</b> 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> .....		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? .....	X	

**Note.** All Form 990 filers are required to complete Schedule O .....

Form 990 (2016)

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

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

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

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 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
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year 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>1a</b> 15		
<b>b</b>	Enter the number of voting members included in line 1a, above, who are independent		
	<b>1b</b> 15		
<b>2</b>	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?		X
<b>3</b>	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?		X
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
<b>6</b>	Did the organization have members or stockholders?		X
<b>7a</b>	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?		X
<b>b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b>	The governing body?	X	
<b>b</b>	Each committee with authority to act on behalf of the governing body?	X	
<b>9</b>	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		X

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

		Yes	No
<b>10a</b>	Did the organization have local chapters, branches, or affiliates?		X
<b>b</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?		
<b>10b</b>			
<b>11a</b>	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	X	
<b>b</b>	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b>	Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
<b>b</b>	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
<b>c</b>	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	X	
<b>12c</b>		X	
<b>13</b>	Did the organization have a written whistleblower policy?	X	
<b>14</b>	Did the organization have a written document retention and destruction policy?	X	
<b>15</b>	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?		
<b>a</b>	The organization's CEO, Executive Director, or top management official	X	
<b>b</b>	Other officers or key employees of the organization	X	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
<b>16a</b>	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
<b>b</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?		
<b>16b</b>			

**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 Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 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 - (805) 543-2323**  
**550 DANA STREET, SAN LUIS OBISPO, CA 93401**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check 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, and 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 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) GRENDA 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.





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**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	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns .....	<b>1a</b>				
	<b>b</b> Membership dues .....	<b>1b</b>				
	<b>c</b> Fundraising events .....	<b>1c</b>	92,475.			
	<b>d</b> Related organizations .....	<b>1d</b>				
	<b>e</b> Government grants (contributions) .....	<b>1e</b>				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above .....	<b>1f</b>	3,209,538.			
	<b>g</b> Noncash contributions included in lines 1a-1f: \$ .....		263,066.			
	<b>h Total.</b> Add lines 1a-1f .....		3,302,013.			
	<b>Program Service Revenue</b>	<b>2 a</b> _____	<b>Business Code</b>			
<b>b</b> _____						
<b>c</b> _____						
<b>d</b> _____						
<b>e</b> _____						
<b>f</b> All other program service revenue .....						
<b>g Total.</b> Add lines 2a-2f .....						
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....		1,220,522.		1,220,522.	
	<b>4</b> Income from investment of tax-exempt bond proceeds .....					
	<b>5</b> Royalties .....					
	<b>6 a</b> Gross rents .....	(i) Real				
		(ii) Personal				
		<b>b</b> Less: rental expenses .....				
		<b>c</b> Rental income or (loss) .....				
	<b>d</b> Net rental income or (loss) .....					
	<b>7 a</b> Gross amount from sales of assets other than inventory .....	(i) Securities				
		(ii) Other				
		<b>b</b> Less: cost or other basis and sales expenses .....		19,453,787.		
		<b>c</b> Gain or (loss) .....		565,692.		
	<b>d</b> Net gain or (loss) .....		565,692.		565,692.	
	<b>8 a</b> Gross income from fundraising events (not including \$ 92,475. of contributions reported on line 1c). See Part IV, line 18 .....	<b>a</b>	51,600.			
		<b>b</b> Less: direct expenses .....	<b>b</b>	27,238.		
<b>c</b> Net income or (loss) from fundraising events .....			24,362.		24,362.	
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....	<b>a</b>					
	<b>b</b> Less: direct expenses .....	<b>b</b>				
	<b>c</b> Net income or (loss) from gaming activities .....					
<b>10 a</b> Gross sales of inventory, less returns and allowances .....	<b>a</b>					
	<b>b</b> Less: cost of goods sold .....	<b>b</b>				
	<b>c</b> Net income or (loss) from sales of inventory .....					
<b>Miscellaneous Revenue</b>		<b>Business Code</b>				
<b>11 a</b> CHANGE IN SPLIT INTEREST .....	900099	356,268.	356,268.			
<b>b</b> OTHER REVENUE .....	900099	28,011.	28,011.			
<b>c</b> INCOME HELD FOR OTHERS .....	900099	-590,508.	-590,508.			
<b>d</b> All other revenue .....						
<b>e Total.</b> Add lines 11a-11d .....		-206,229.				
<b>12 Total revenue.</b> See instructions. ....		4,906,360.	-206,229.	0.	1,810,576.	

**THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
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**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

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

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**Part X Balance Sheet**

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

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

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**Part XI Reconciliation of Net Assets**

Check 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 Reporting**

Check 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: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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?		X
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:		
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
b Were the organization's financial statements audited by an independent accountant?	X	
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:		
<input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		
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?	X	
If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.		
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?		X
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		

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THE COMMUNITY FOUNDATION SAN LUIS OBISPO

Schedule A (Form 990 or 990-EZ) 2016 COUNTY

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**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, or 8 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
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	6306230.	2247578.	7793849.	5650351.	2978383.	24976391.
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....	6306230.	2247578.	7793849.	5650351.	2978383.	24976391.
<b>5</b> 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) .....						
<b>6 Public support.</b> Subtract line 5 from line 4.						24976391.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
<b>7</b> Amounts from line 4 .....	6306230.	2247578.	7793849.	5650351.	2978383.	24976391.
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....	950,279.	986,186.	1148940.	1200724.	1220522.	5506651.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>11 Total support.</b> Add lines 7 through 10						30483042.
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	
<b>13 First five years.</b> 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 <b>stop here</b> .....						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2016 (line 6, column (f) divided by line 11, column (f)) .....	<b>14</b>	81.94 %
<b>15</b> Public support percentage from 2015 Schedule A, Part II, line 14 .....	<b>15</b>	82.73 %
<b>16a 33 1/3% support test - 2016.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input checked="" type="checkbox"/>
<b>b 33 1/3% support test - 2015.</b> 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 <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>17a 10% -facts-and-circumstances test - 2016.</b> 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 <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>b 10% -facts-and-circumstances test - 2015.</b> 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 <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....		<input type="checkbox"/>

Schedule A (Form 990 or 990-EZ) 2016

**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
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> 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 .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</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 .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (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
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 Total support.</b> (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**

<b>15</b> Public support percentage for 2016 (line 8, column (f) divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2015 Schedule A, Part III, line 15 .....	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

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

**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 in line 12 on 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
<b>1</b> 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>		
<b>2</b> 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>		
<b>3a</b> 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>		
<b>b</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>		
<b>c</b> 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>		
<b>4a</b> 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>		
<b>b</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>		
<b>c</b> 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>		
<b>5a</b> 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>		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> 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>		
<b>7</b> 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>		
<b>8</b> 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>		
<b>9a</b> 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>		
<b>b</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>		
<b>c</b> 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>		
<b>10a</b> 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 10b below.</i>		
<b>b</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>		

**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> 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>b</b> A family member of a person described in (a) above?		
<b>c</b> A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.		
<b>11a</b>		
<b>11b</b>		
<b>11c</b>		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> 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? 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.		
<b>2</b> 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? 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.		
<b>1</b>		
<b>2</b>		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> 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)? 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).		
<b>1</b>		

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> 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?		
<b>2</b> 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? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
<b>3</b> 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? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		
<b>1</b>		
<b>2</b>		
<b>3</b>		

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).			
<b>2</b> Activities Test. Answer (a) and (b) below.		Yes	No
<b>a</b> 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? 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.			
<b>b</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? 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.			
<b>3</b> Parent of Supported Organizations. Answer (a) and (b) below.			
<b>a</b> 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? Provide details in Part VI.			
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.			
<b>2a</b>			
<b>2b</b>			
<b>3a</b>			
<b>3b</b>			

**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 (explain in Part VI.) **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A - Adjusted Net Income</b>		(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	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

<b>Section B - Minimum Asset Amount</b>		(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):		
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	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):		
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	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

<b>Section C - Distributable Amount</b>			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	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

THE COMMUNITY FOUNDATION SAN LUIS OBISPO

Schedule A (Form 990 or 990-EZ) 2016 COUNTY

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

Section D - Distributions	Current Year
<b>1</b> Amounts paid to supported organizations to accomplish exempt purposes	
<b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
<b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations	
<b>4</b> Amounts paid to acquire exempt-use assets	
<b>5</b> Qualified set-aside amounts (prior IRS approval required)	
<b>6</b> Other distributions (describe in <b>Part VI</b> ). See instructions	
<b>7 Total annual distributions.</b> Add lines 1 through 6	
<b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions	
<b>9</b> Distributable amount for 2016 from Section C, line 6	
<b>10</b> 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
<b>1</b> Distributable amount for 2016 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2016 (reasonable cause required- explain in Part VI). See instructions			
<b>3</b> Excess distributions carryover, if any, to 2016:			
<b>a</b>			
<b>b</b>			
<b>c</b> From 2013			
<b>d</b> From 2014			
<b>e</b> From 2015			
<b>f Total</b> of lines 3a through e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2016 distributable amount			
<b>i</b> Carryover from 2011 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
<b>4</b> Distributions for 2016 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2016 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from 4			
<b>5</b> Remaining underdistributions for years prior to 2016, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions			
<b>6</b> Remaining underdistributions for 2016. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions			
<b>7 Excess distributions carryover to 2017.</b> Add lines 3j and 4c			
<b>8</b> Breakdown of line 7:			
<b>a</b>			
<b>b</b> Excess from 2013			
<b>c</b> Excess from 2014			
<b>d</b> Excess from 2015			
<b>e</b> Excess from 2016			

Schedule A (Form 990 or 990-EZ) 2016

THE COMMUNITY FOUNDATION SAN LUIS OBISPO

**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.)

Multiple horizontal lines for supplemental information.

**Schedule B**

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2016**

Name of the organization

THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY

Employer identification number

77-0496500

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)( 3 ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ..... ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

<b>Name of organization</b> THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY	<b>Employer identification number</b> 77-0496500
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**Part I Contributors** (See instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 600,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2		\$ 313,100.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3		\$ 288,667.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4		\$ 250,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5		\$ 217,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6		\$ 130,106.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization <b>THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY</b>	Employer identification number 77-0496500
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**Part I Contributors** (See instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7		\$ 116,754.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8		\$ 94,131.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)



Name of organization <b>THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY</b>	Employer identification number <b>77-0496500</b>
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**Part II Noncash Property** (See instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
6	SECURITIES <hr/> <hr/> <hr/> <hr/>	\$ 130,106.	01/13/16
<hr/>	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
<hr/>	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
<hr/>	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
<hr/>	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
<hr/>	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
<hr/>	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
<hr/>	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____

<b>Name of organization</b> THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY	<b>Employer identification number</b> 77-0496500
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**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) ▶ \$ \_\_\_\_\_  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	

**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.**

OMB No. 1545-0047

**2016**

**Open to Public Inspection**

▶ **Information about Schedule D (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).**

**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? .....		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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? .....		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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 a 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 Tax 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? .....

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)? .....

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 .....

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

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:
- |                                 | Amount |
|---------------------------------|--------|
| c Beginning balance             | 1c     |
| d Additions during the year     | 1d     |
| e Distributions during the year | 1e     |
| f Ending balance                | 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 on 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  54.00 %
- c Temporarily restricted endowment  46.00 %

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

	Yes	No
3a(i)		<input checked="" type="checkbox"/>
3a(ii)		<input checked="" type="checkbox"/>
3b		

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

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.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				1,639,829.

**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		
(B) HEDGE FUNDS	2,954,584.	END-OF-YEAR MARKET VALUE
(C) FIXED INCOME/MUTUAL FUNDS	10,813,429.	END-OF-YEAR MARKET VALUE
(D) US GOVERNMENT AND		
(E) CORPORATE BONDS	3,159,488.	END-OF-YEAR MARKET VALUE
(F)		
(G)		
(H)		
<b>Total.</b> (Col. (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)		
<b>Total.</b> (Col. (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)	
<b>Total.</b> (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	
(2) PAYROLL LIABILITIES	6,170.
(3) LIABILITIES TO BENEFICIARIES FROM	
(4) SPLIT INTEREST AGREEMENTS	678,316.
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (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.

**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).

**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. THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
COUNTY ENCOURAGES DONORS AND AGENCIES TO OPEN ENDOWMENT FUNDS FOR THE

**Part XIII** Supplemental Information (continued)

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 FOUNDATION'S SPENDING POLICY WHICH IS TO DISBURSE UP TO 4.00% PER ANNUM OF THE PRECEDING 12 QUARTER TRAILING AVERAGE INVESTED IN THE POOL PER FUND.

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.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

**Part XIII** Supplemental Information (continued)

INCOME RECORDED BY SUPPORTING ORG INCLUDED IN THE CONSOLIDATED  
AUDITED FINANCIAL STATEMENTS

TRANSFER RECORDED FROM SUPPORTING ORG INCLUDED  
IN THE CONSOLIDATED AUDITED FINANCIAL STATEMENTS

DIRECT EXPENSES FROM FUNDRAISING EVENT

PART XII, LINE 2D - OTHER ADJUSTMENTS:

EXPENSES RECORDED BY SUPPORTING ORG INCLUDED IN THE CONSOLIDATED  
AUDITED FINANCIAL STATEMENTS

DIRECT EXPENSES FROM FUNDRAISING EVENT





THE COMMUNITY FOUNDATION SAN LUIS OBISPO

Schedule G (Form 990 or 990-EZ) 2016 COUNTY

77-0496500 Page 2

**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.

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))
		WOMEN ' S LEGACY LUNCH (event type)	(event type)	NONE (total number)	
Revenue	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.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1	Gross revenue			
Direct Expenses	2	Cash prizes			
	3	Noncash prizes			
	4	Rent/facility costs			
	5	Other direct expenses			
	6	Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> 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: \_\_\_\_\_



**Part IV** Supplemental Information (continued)

Lined area for supplemental information.

**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**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](http://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 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.

<b>1 (a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC section (if applicable)	<b>(d)</b> Amount of cash grant	<b>(e)</b> Amount of non-cash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	<b>(g)</b> Description of noncash assistance	<b>(h)</b> 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.	0.		N/A	SOUTH COUNTY SUPPORTIVE SERVICES PROGRAM
SAN LUIS OBISPO SYMPHONY. INC. P.O. BOX 658 SAN LUIS OBISPO, CA 93406	95-2493144	501(C)(3)	52,790.	0.		N/A	ARTS
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY - P.O. BOX 1444 - SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	50,000.	0.		N/A	UNRESTRICTED
CAL POLY FOUNDATION I GRAND AVE., HERON HALL SAN LUIS OBISPO, CA 93407	20-4927897	501(C)(3)	49,000.	0.		N/A	TO SUPPORT THE SOCIAL ENTERPRISE PROGRAM AT THE INCUBATOR.
FIDELITY CHARITABLE GIFT FUND P.O. BOX 770001 CINCINNATI, OH 45277-0053	11-0303001		46,543.	0.		N/A	TO TRANSFER THE BALANCE OF THE FUND TO FIDELITY CHARITABLE
CENTRAL COAST AQUARIUM P.O. BOX 460 AVILA BEACH, CA 93424	77-0479110	501(C)(3)	46,058.	0.		N/A	LIFE SUPPORT SYSTEM UPGRADES

**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.**

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) (2016)

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
COUNTY

Schedule I (Form 990)

77-0496500

Page 1

**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(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.	0.-		N/A	EASTER SEALS OF SOUTHERN CALIFORNIA
FOOTHILL COUNTRY DAY SCHOOL 1035 WEST HARRISON AVENUE CLAREMONT, CA 91711	95-1816057		43,510.	0.-		N/A	RE-GRADE, RESOD, AND ENLARGE THE UPPER FIELD WITH DROUGHT-TOLERANT HYBRID BERMUDA AND
JACK'S HELPING HAND P.O. BOX 14718 SAN LUIS OBISPO, CA 93406	20-4731313	501(C)(3)	40,000.	0.-		N/A	UNRESTRICTED
SLO COUNTY OFFICE OF EDUCATION 3350 EDUCATION DRIVE SAN LUIS OBISPO, CA 93405		GOVERNMENT	40,000.	0.-		N/A	2016 RAISING A READER PROGRAM
BOYS & GIRLS CLUB OF NORTH SLO COUNTY - P.O. BOX 3037 - PASO ROBLES, CA 93447	77-0272094	501(C)(3)	40,000.	0.-		N/A	EXECUTE BOYS & GIRLS CLUB OF AMERICA SMART GIRLS CURRICULUM, COUPLED WITH ON-SITE ONE-TO-ONE
CAL POLY FOUNDATION I GRAND AVE., HERON HALL SAN LUIS OBISPO, CA 93407	20-4927897	501(C)(3)	27,828.	0.-		N/A	MUSIC DEPT BUILDING CAPITAL IMPROVEMENTS
CAL POLY FOUNDATION I GRAND AVE., HERON HALL SAN LUIS OBISPO, CA 93407	20-4927897	501(C)(3)	27,828.	0.-		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.	0.-		N/A	ANNUAL DISTRIBUTION
BRIDGE TO TURKIYE FUND 100 FOX BRIAR LANE CARY, NC 27518	58-2678580	501(C)(3)	24,798.	0.-		N/A	S. SAMI SOLU, M.D. CHARITABLE FUND SCHOLARSHIP

Schedule I (Form 990)

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
COUNTY

Schedule I (Form 990)

77-0496500

Page 1

**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(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 93421-0222	77-0020195	501(C)(3)	24,000.	0.-		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.	0.-		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.	0.-		N/A	OPERATIONS OF PRADO DAY CENTER
TRANSITIONS-MENTAL HEALTH ASSOCIATION - 784 HIGH STREET - SAN LUIS OBISPO, CA 93401	95-3509040	501(C)(3)	20,000.	0.-		N/A	INDEPENDENT LIVING PROGRAM
MAURY MAGIC RIDERS INC. P.O. BOX 560 COLUMBIA, TN 38402	62-1742129	501(C)(3)	20,000.	0.-		N/A	UNRESTRICTED
TRANSITIONAL FOOD AND SHELTER, INC. - P.O. BOX 4471 - PASO ROBLES, CA 93447	77-0489535	501(C)(3)	17,350.	0.-		N/A	TEMPORARY EMERGENCY SHELTER FOR THE HOMELESS
FOOD BANK COALITION OF SAN LUIS OBISPO COUNTY - 1180 KENDALL ROAD - SAN LUIS OBISPO, CA 93401	77-0210727	501(C)(3)	15,800.	0.-		N/A	NO-COOK BAGS PROGRAM
ARTS OBISPO 1123 MILL STREET SAN LUIS OBISPO, CA 93401	95-3738562	501(C)(3)	15,430.	0.-		N/A	ARTS OBISPO
WOMEN'S SHELTER PROGRAM OF SAN LUIS OBISPO COUNTY - P.O. BOX 125 - SAN LUIS OBISPO, CA 93406	95-3370729	501(C)(3)	15,000.	0.-		N/A	MOVE-IN AND CASE MANAGEMENT

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(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.	0.-		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.	0.-		N/A	TO SUPPORT EMERGENCY ROOM RENOVATIONS
FRESH S.T.A.R.T. 907 HATCHER LANE COLUMBIA, TN 38401	47-5304890		15,000.	0.-		N/A	UNRESTRICTED
COMMUNITY ACTION PARTNERSHIP OF SAN LUIS OBISPO COUNTY - 1030 SOUTHWOOD DRIVE - SAN LUIS OBISPO, CA 93401	95-2410253	501(C)(3)	15,000.	0.-		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.	0.-		N/A	MINI-GRANT WINTER 2016
RISE P.O.BOX 630 PASO ROBLES, CA 93447	77-0068977	501(C)(3)	14,000.	0.-		N/A	\$7,000 FOR THERAPY PROGRAMS FOR SURVIVORS, \$7,000 FOR EMERGENCY FAMILY SERVICES AND
FIVE CITIES HOMELESS COALITION P.O. BOX 558 GROVER BEACH, CA 93483-0558	27-0413593	501(C)(3)	13,500.	0.-		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.	0.-		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.	0.-		N/A	STABLE AND SAFE HOUSING

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SCRIPPS RESEARCH INSTITUTE 10550 NORTH TORREY PINES ROAD, TPC- LA JOLLA, CA 92037	33-0435954	501(C)(3)	10,703.	0.-		N/A	STEM CELL RESEARCH
WILLIAM SANSUM DIABETES RESEARCH CENTER - 2219 BATH ST - SANTA BARBARA, CA 93105		501(C)(3)	10,703.	0.-		N/A	UNRESTRICTED
NORTHERN CALIFORNIA INSTITUTE FOR RESEARCH & EDUCATION - 4150 CLEMENT STREET, 151NC - SAN FRANCISCO, CA 94121-1545	94-3084159	501(C)(3)	10,703.	0.-		N/A	PARKINSON'S DISEASE RESEARCH
UCLA DEPARTMENT OF NEUROLOGY - MARY S. EASTON CENTER FOR ALZHEIMER'S RESEAR - 710 WESTWOOD BOULEVARD, SUITE C153 - LOS		GOVERNMENT	10,703.	0.-		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.	0.-		N/A	UNRESTRICTED
SLO MUSEUM OF ART (SLOMA) P.O. BOX 813 SAN LUIS OBISPO, CA 93406	95-6134270	501(C)(3)	10,703.	0.-		N/A	CAPITAL IMPROVEMENTS
PEOPLES' SELF-HELP HOUSING 3533 EMPLEO STREET SAN LUIS OBISPO, CA 93401	95-2750154	501(C)(3)	10,000.	0.-		N/A	SUPPORTIVE HOUSING PROGRAM
SOUTH COUNTY YOUTH COALITION P.O. BOX 371 ARROYO GRANDE, CA 93421	77-0495870	501(C)(3)	10,000.	0.-		N/A	THRIVE FUND
EL CAMINO HOMELESS ORGANIZATION PO BOX 2077 ATASCADERO, CA 93423	77-0545434	501(C)(3)	10,000.	0.-		N/A	TACKLING THE BARRIERS

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ONE COOL EARTH P.O. BOX 150 SAN LUIS OBISPO, CA 93406	34-1930404	501(C)(3)	10,000.	0.		N/A	GIRL CIRCLE
ELINGS PARK FOUNDATION 1298 LAS POSITAS ROAD SANTA BARBARA, CA 93105	95-3500475	501(C)(3)	10,000.	0.		N/A	UNRESTRICTED
CENTRAL COAST LINK DBA THE LINK 6500 MORRO ROAD, SUITE A ATASCADERO, CA 93422	91-2022036	501(C)(3)	10,000.	0.		N/A	CRISIS INTERVENTION - ATASCADERO FAMILY RESOURCE CENTER
COMMUNITY ACTION PARTNERSHIP OF SAN LUIS OBISPO COUNTY - 1030 SOUTHWOOD DRIVE - SAN LUIS OBISPO, CA 93401	95-2410253	501(C)(3)	10,000.	0.		N/A	MIGRANT AND SEASONAL HEAD START (MSHS) PROGRAM
5 CITIES COMMUNITY SERVICE FOUNDATION - P.O. BOX 558 - GROVER BEACH, CA 93483			10,000.	0.		N/A	5CITIES HOMELESS COALITION
PATHPOINT 11491 LOS OSOS VALLEY RD. SAN LUIS OBISPO, CA 93405	95-2371668		10,000.	0.		N/A	PROJECT SEARCH
FOOD BANK COALITION OF SAN LUIS OBISPO COUNTY - 1180 KENDALL ROAD - SAN LUIS OBISPO, CA 93401	77-0210727	501(C)(3)	10,000.	0.		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 - P.O. BOX 3037 - PASO ROBLES, CA 93447	77-0272094	501(C)(3)	10,000.	0.		N/A	TO SUPPORT THE SMART GIRLS PROGRAM
JODI HOUSE, INC 625 CHAPALA ST. SANTA BARBARA, CA 93101	95-3836137		10,000.	0.		N/A	BRAIN INJURY SUPPORT

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CENTRAL COAST WILDLIFE REHABILITATION GUILD DBA PACIFIC WILDLIFE CARE - POST OFFICE BOX 1134 - MORRO BAY, CA 93443	77-0196350	501(C)(3)	10,000.	0.-		N/A	UNRESTRICTED
SLO LITTLE THEATRE, INC P.O. BOX 122 SAN LUIS OBISPO, CA 93406	95-2556678	501(C)(3)	10,000.	0.-		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.	0.-		N/A	THE CHILDREN'S FARMERS MARKET PROGRAM
TRANSITIONAL FOOD AND SHELTER, INC. - P.O. BOX 4471 - PASO ROBLES, CA 93447	77-0489535	501(C)(3)	10,000.	0.-		N/A	REQUEST FUNDS
PEOPLES' SELF-HELP HOUSING 3533 EMPLEO STREET SAN LUIS OBISPO, CA 93401	95-2750154	501(C)(3)	10,000.	0.-		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.	0.-		N/A	HOMELESS SERVICES CASE MANAGEMENT AND PAPAS OF THE CENTRAL COAST
FRIENDS OF PRADO DAY CENTER P.O. BOX 12444 SAN LUIS OBISPO, CA 93406	77-0540323	501(C)(3)	10,000.	0.-		N/A	TO SUPPORT THE BUILDING CAMPAIGN
FOUNDATION FOR THE PERFORMING ARTS CENTER - P.O. BOX 1137 - SAN LUIS OBISPO, CA 93406	77-0129605	501(C)(3)	10,000.	0.-		N/A	SCHOOL MATINEE PROGRAM
SAN LUIS OBISPO SYMPHONY. INC. P.O. BOX 658 SAN LUIS OBISPO, CA 93406	95-2493144	501(C)(3)	10,000.	0.-		N/A	CADET WINDS

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PASO ROBLES YOUTH ARTS FOUNDATION POST OFFICE BOX 4699 PASO ROBLES, CA 93447	77-0488880		10,000.	0.		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.	0.		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.	0.		N/A	THE CHILDREN'S FARMERS MARKET PROGRAM
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY - P.O. BOX 1444 - SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	9,000.	0.		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.	0.		N/A	COUNTYWIDE HISTORY TOUR COOPERATIVE
SHRINERS HOSPITAL FOR CHILDREN P.O. BOX 31356 TAMPA, FL 33631	04-2121399	501(C)(3)	8,563.	0.		N/A	UNRESTRICTED
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.	0.		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.	0.		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.	0.		N/A	ADULT WELLNESS AND PREVENTION SCREENING PROGRAM

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TOLOSA CHILDREN'S DENTAL CENTER/PARTNERSHIP FOR THE CHILDREN OF SLO COUNTY - 717 WALNUT DRIVE - PASO ROBLES, CA	77-0346861	501(C)(3)	8,500.	0.-		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.	0.-		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.	0.-		N/A	PREMATURE INFANTS' BREASTFEEDING PROGRAM
COLUMBIA FIRST UNITED METHODIST CHURCH - 222 WEST 7TH STREET - COLUMBIA, TN 38401		RELIGIOUS	8,000.	0.-		N/A	UNRESTRICTED
TRANSITIONS-MENTAL HEALTH ASSOCIATION - 784 HIGH STREET - SAN LUIS OBISPO, CA 93401	95-3509040	501(C)(3)	8,000.	0.-		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.	0.-		N/A	CLIENT CASES MANAGEMENT DATABASE
CAL POLY CORPORATION 1 GRAND AVENUE BLDG. 15 SAN LUIS OBISPO, CA 93407-0035	95-1648180	501(C)(3)	8,000.	0.-		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.	0.-		N/A	ANNUAL DISTRIBUTION FOR OPERATIONS
CLARK CENTER FOUNDATION P.O. BOX 1114 ARROYO GRANDE, CA 93421	77-0150216	501(C)(3)	7,688.	0.-		N/A	UNRESTRICTED

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SAN LUIS OBISPO SYMPHONY. INC. P.O. BOX 658 SAN LUIS OBISPO, CA 93406	95-2493144	501(C)(3)	7,688.	0.-		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.	0.-		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.	0.-		N/A	ANNUAL DISTRIBUTION FOR OPERATIONS
CUESTA COLLEGE FOUNDATION P. O. BOX 8106 SAN LUIS OBISPO, CA 93403-8106	23-7225601	501(C)(3)	7,688.	0.-		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.	0.-		N/A	OUTREACH PROGRAM
CASA SOLANA, INC. 383 S. THIRTEENTH STREET GROVER BEACH, CA 93433	95-3751698		7,000.	0.-		N/A	GIFT BEDS
TRANSITIONAL FOOD AND SHELTER, INC. - P.O. BOX 4471 - PASO ROBLES, CA 93447	77-0489535	501(C)(3)	7,000.	0.-		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.	0.-		N/A	CRISIS INTERVENTION PROGRAM - PASO ROBLES FAMILY RESOURCE
ONE COOL EARTH P.O. BOX 150 SAN LUIS OBISPO, CA 93406	34-1930404	501(C)(3)	7,000.	0.-		N/A	WATER CONSERVATION FUNDING

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SOUTH COUNTY EDUCATION FOUNDATION POST OFFICE BOX 222 ARROYO GRANDE, CA 93421-0222	77-0020195	501(C)(3)	7,000.	0.-		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.	0.-		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.	0.-		N/A	UNRESTRICTED
CAL POLY FOUNDATION I GRAND AVE., HERON HALL SAN LUIS OBISPO, CA 93407	20-4927897	501(C)(3)	6,422.	0.-		N/A	VOCAL MUSIC SCHOLARSHIP
ACCESS SUPPORT NETWORK SLO & MONTEREY COUNTIES (FORMERLY AIDS SUPPORT NETWO - P.O. BOX 12158 - SAN LUIS OBISPO, CA 93406	77-0205717	501(C)(3)	6,000.	0.-		N/A	SAN LUIS OBISPO SYRINGE EXCHANGE PROGRAM (SLOSEP)
SAN LUIS OBISPO VOCAL ARTS ENSEMBLE - P.O. BOX 4306 - SAN LUIS OBISPO, CA 93403	95-3370761	501(C)(3)	6,000.	0.-		N/A	2017 SPRING SCHOOL CHORAL FESTIVAL
SANTA MARIA VALLEY SENIOR CITIZEN'S CLUB - 510 E. PARK - SANTA MARIA, CA 93454	77-0111371		6,000.	0.-		N/A	SENIOR GROUP DANCES
BASIN STREET REGULARS-CENTRAL COAST HOT JAZZ SOCIETY - P.O. BOX 356 - PISMO BEACH, CA 93448	95-3214113		6,000.	0.-		N/A	SUNDAY SESSIONS OF BASIN STREET REGULARS
RISE P.O. BOX 630 PASO ROBLES, CA 93447	77-0068977	501(C)(3)	6,000.	0.-		N/A	SHELTER PROGRAM

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MONTEREY RIDGE ELEMENTARY SCHOOL 17117 4S RANCH PARKWAY SAN DIEGO, CA 92127-8853		GOVERNMENT	6,000.	0.-		N/A	JULES TRANDEM CLASS EXPERIENCES
SLO COUNTY PUBLIC HEALTH DEPARTMENT - 2180 JOHNSON AVENUE - SAN LUIS OBISPO, CA 93401			5,535.	0.-		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.	0.-		N/A	OPERATIONS ANNUAL DISBURSEMENT
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY - P.O. BOX 1444 - SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	5,000.	0.-		N/A	40 PRADO PROJECT
FRIENDS OF PRADO DAY CENTER P.O. BOX 12444 SAN LUIS OBISPO, CA 93406	77-0540323	501(C)(3)	5,000.	0.-		N/A	PREFERENCE IS TO SUPPORT THE WARMING SHELTER, HOWEVER THE FUNDS MAY BE USED FOR IMMEDIATE NEEDS,
RESTORATIVE PARTNERS, INC. (RP) 4251 S. HIGUERA ST. ST. 102 SAN LUIS OBISPO, CA 93401			5,000.	0.-		N/A	JUVENILE HALL TREATMENT CENTER GARDEN PROJECT
CASA/COURT APPOINTED SPECIAL ADVOCATES OF SLO COUNTY - 75 HIGUERA ST. #180 - SAN LUIS OBISPO, CA 93401	77-0316227	501(C)(3)	5,000.	0.-		N/A	CASA'S INFANT/TODDLER PROGRAM
CHRIS JESPERSEN MEMORIAL SOCIETY 3350 EDUCATION DRIVE SAN LUIS OBISPO, CA 93405		501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED GIFT
LEADERSHIP SLO FOUNDATION, INC. 895 MONTEREY SAN LUIS OBISPO, CA 93401	77-0417076	501(C)(3)	5,000.	0.-		N/A	LEADERSHIP SLO

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NCI AFFILIATES, INC. 1434 CHESTNUT STREET PASO ROBLES, CA 93446	95-3445094		5,000.	0.-		N/A	UNRESTRICTED
FOUNDATION FOR THE PERFORMING ARTS CENTER - P.O. BOX 1137 - SAN LUIS OBISPO, CA 93406	77-0129605	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
CAYUCOS LAND CONSERVANCY P.O. BOX 336 CAYUCOS, CA 93430	77-0506896	501(C)(3)	5,000.	0.-		N/A	HILLSIDE LOTS
TRANSITIONS-MENTAL HEALTH ASSOCIATION - 784 HIGH STREET - SAN LUIS OBISPO, CA 93401	95-3509040	501(C)(3)	5,000.	0.-		N/A	BISHOP STREET STUDIOS CAPITAL CAMPAIGN
COLUMBIA COUNSELING MINISTRIES 5001 TROTWOOD AVENUE COLUMBIA, TN 38401	30-0604415	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
COLUMBIA COUNSELING MINISTRIES 5001 TROTWOOD AVENUE COLUMBIA, TN 38401	30-0604415	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
MAURY MAGIC RIDERS INC. P.O. BOX 560 COLUMBIA, TN 38402	62-1742129	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
WHITMAN COLLEGE, OFFICE OF ANNUAL GIVING - 345 BOYER AVE. - WALLA WALLA, WA 99362	91-0567740	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
BOY SCOUTS OF AMERICA - MIDDLE TENNESSEE COUNCIL - 908 CREEKVIEW DRIVE - COLUMBIA, TN 38401	62-0477729		5,000.	0.-		N/A	STEM SCOUTS PROGRAM (SCIENCE, TECHNOLOGY, ENGINEERING, AND MATH)

Schedule I (Form 990)

**THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
COUNTY**

Schedule I (Form 990)

77-0496500

Page 1

**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(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.	0.-		N/A	VIAL OF LIFE PROGRAM
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY - P.O. BOX 1444 - SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	5,000.	0.-		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.	0.-		N/A	AFFORDABLE PSYCHOTHERAPY
COMMUNITY FOUNDATION OF ESTERO BAY (FORMERLY MORRO BAY COMMUNITY FOUNDATION - P.O. BOX 131 - MORRO BAY, CA 93443	77-0336404	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
TRANSITIONS-MENTAL HEALTH ASSOCIATION - 784 HIGH STREET - SAN LUIS OBISPO, CA 93401	95-3509040	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
GLOBAL GLIMPSE 101 BROADWAY, SUITE 301 OAKLAND, CA 94607	26-0651273	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
FRENCH HOSPITAL MEDICAL CENTER FOUNDATION AND PUBLIC AFFAIRS - 1911 JOHNSON AVENUE - SAN LUIS OBISPO, CA 93401	20-3256125	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
FIRST UNITED METHODIST CHURCH 200 WEST MAIN STREET MCMINNVILLE, TN 37110			5,000.	0.-		N/A	UNRESTRICTED
HOMELESS FOUNDATION FOR SAN LUIS OBISPO COUNTY - P.O. BOX 1444 - SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED

Schedule I (Form 990)

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
COUNTY

Schedule I (Form 990)

77-0496500

Page 1

**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(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 - P.O. BOX 1444 - SAN LUIS OBISPO, CA 93406	30-0811413	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED
VOICES AGAINST BRAIN CANCER 1441 BROADWAY, #3025 NEW YORK, NY 10018	20-2872778	501(C)(3)	5,000.	0.-		N/A	TO SUPPORT JOIN THE VOICES! SAN FRANCISCO RUN/WALK IN GOLDEN GATE PARK ON SUNDAY, NOVEMBER
MOVING TRAIN, INC. P.O. BOX 3033 LOS ALTOS, CA 94024	80-0376076	501(C)(3)	5,000.	0.-		N/A	JOURNEY TO ROYAL
STANFORD UNIVERSITY 326 GLAVEZ STREET STANFORD, CA 94305			5,000.	0.-		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.	0.-		N/A	OPERATING COSTS
ETHOS YOUTH ENSEMBLES PO BOX 332255 MURFREESBORO, TN 37133	62-1691655		5,000.	0.-		N/A	UNRESTRICTED
ASSISTANCE LEAGUE OF SAN LUIS OBISPO COUNTY - P.O. BOX 14904 - SAN LUIS OBISPO, CA 93406	77-0337378	501(C)(3)	5,000.	0.-		N/A	OPERATION SCHOOL BELL
LES FELDICK MINISTRIES 30706 W. LONA VALLEY ROAD KINTA, OK 74552	73-1387441	501(C)(3)	5,000.	0.-		N/A	UNRESTRICTED

Schedule I (Form 990)

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
 COUNTY

**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 noncash 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

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

**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

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
COUNTY

Schedule I (Form 990)

77-0496500

Page 2

**Part III** Continuation of Grants and Other Assistance to Individuals in the United States (Schedule I (Form 990), Part III.)

(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 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

Schedule I (Form 990)

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
COUNTY

Schedule I (Form 990)

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**Part III** Continuation of Grants and Other Assistance to Individuals in the United States (Schedule I (Form 990), Part III.)

(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 DENNIS T. COLLINS & THOMAS D. SALISBURY TROOP 60 EAGLE SCOUT SCHOLARSHIP	1.	1,500.	0.	N/A	N/A
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

Schedule I (Form 990)

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
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Schedule I (Form 990)

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**Part III** Continuation of Grants and Other Assistance to Individuals in the United States (Schedule I (Form 990), Part III.)

(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 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
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

Schedule I (Form 990)

THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
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**Part III** Continuation of Grants and Other Assistance to Individuals in the United States (Schedule I (Form 990), Part III.)

(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 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 I (Form 990)



**Part IV Supplemental Information**

VISITS ARE RECORDED IN THE GRANT FILE.

PART II, LINE 1, COLUMN (H):

NAME OF ORGANIZATION OR GOVERNMENT: FOOTHILL COUNTRY DAY SCHOOL

(H) PURPOSE OF GRANT OR ASSISTANCE: RE-GRADE, RESOD, AND ENLARGE THE  
UPPER FIELD WITH DROUGHT-TOLERANT HYBRID BERMUDA AND INSTALL NEW  
SPRINKLERS

NAME OF ORGANIZATION OR GOVERNMENT: BOYS & GIRLS CLUB OF NORTH SLO COUNTY

(H) PURPOSE OF GRANT OR ASSISTANCE: EXECUTE BOYS & GIRLS CLUB OF AMERICA  
SMART GIRLS CURRICULUM, COUPLED WITH ON-SITE ONE-TO-ONE MENTORING FOR ALL  
PARTICIPANTS.

NAME OF ORGANIZATION OR GOVERNMENT: RISE

(H) PURPOSE OF GRANT OR ASSISTANCE: \$7,000 FOR THERAPY PROGRAMS FOR  
SURVIVORS, \$7,000 FOR EMERGENCY FAMILY SERVICES AND SURVIVORS OF INTIMATE  
PARTNER VIOLENCE.

NAME OF ORGANIZATION OR GOVERNMENT: FRIENDS OF PRADO DAY CENTER

(H) PURPOSE OF GRANT OR ASSISTANCE: PREFERENCE IS TO SUPPORT THE WARMING  
SHELTER, HOWEVER THE FUNDS MAY BE USED FOR IMMEDIATE NEEDS, AS LONG AS  
THE FUNDS ARE USED FOR OPERATING FUNDS AND NOT FOR THE CAPITAL CAMPAIGN

NAME OF ORGANIZATION OR GOVERNMENT: VOICES AGAINST BRAIN CANCER

(H) PURPOSE OF GRANT OR ASSISTANCE: TO SUPPORT JOIN THE VOICES! SAN  
FRANCISCO RUN/WALK IN GOLDEN GATE PARK ON SUNDAY, NOVEMBER 6, 2016 FOR  
DOREE O'CONNELL

**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2016**

Open To Public Inspection

Department of the Treasury  
Internal Revenue Service

- ▶ 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](http://www.irs.gov/form990).

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 ( EVENT SUPPLIE )	X	7	1,165.	FAIR VALUE
26 Other ( )				
27 Other ( )				
28 Other ( )				

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**

	Yes	No
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 isn't required to be used for exempt purposes for the entire holding period?		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?	X	
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) (2016)

**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.

SCHEDULE M, 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 Service

**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](http://www.irs.gov/form990).

OMB No. 1545-0047

**2016**

Open to Public  
Inspection

Name of the organization <b>THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY</b>	Employer identification number <b>77-0496500</b>
--	---

**FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:**

**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.**

**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.**

**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.**

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2016)

632211 08-25-16

Name of the organization THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY	Employer identification number 77-0496500
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FORM 990, PART VI, SECTION B, LINE 15:

COMPENSATION REVIEW & APPROVAL PROCESS FOR OFFICERS & KEY EMPLOYEES

THE FULL BOARD PERIODICALLY CONDUCTS A FORMAL REVIEW PROCESS FOR THE CHIEF EXECUTIVE OFFICER AND ALSO REVIEWS SALARY AND AGREES ON ANY SALARY ADJUSTMENTS.

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.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

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

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](http://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
REAL ESTATE FOUNDATION OF SAN LUIS OBISPO COUNTY - 80-0383894, 550 DANA STREET, SAN LUIS OBISPO, CA 93401	SUPPORTING ORGANIZATION - CONDUCTING ACTIVITIES FOR THE BENEFIT OF CFSLOCO	CALIFORNIA	501(C) (3)	PUBLIC CHARITY -	THE COMMUNITY FOUNDATION SAN LUIS OBISPO	X	

For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule R (Form 990) 2016

SEE PART VII FOR CONTINUATIONS



THE COMMUNITY FOUNDATION SAN LUIS OBISPO  
 COUNTY

**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
<b>a</b> Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity .....		X
<b>b</b> Gift, grant, or capital contribution to related organization(s) .....		X
<b>c</b> Gift, grant, or capital contribution from related organization(s) .....	X	
<b>d</b> Loans or loan guarantees to or for related organization(s) .....		X
<b>e</b> Loans or loan guarantees by related organization(s) .....		X
<b>f</b> Dividends from related organization(s) .....		X
<b>g</b> Sale of assets to related organization(s) .....		X
<b>h</b> Purchase of assets from related organization(s) .....		X
<b>i</b> Exchange of assets with related organization(s) .....		X
<b>j</b> Lease of facilities, equipment, or other assets to related organization(s) .....		X
<b>k</b> Lease of facilities, equipment, or other assets from related organization(s) .....		X
<b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) .....	X	
<b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) .....		X
<b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) .....	X	
<b>o</b> Sharing of paid employees with related organization(s) .....	X	
<b>p</b> Reimbursement paid to related organization(s) for expenses .....		X
<b>q</b> Reimbursement paid by related organization(s) for expenses .....		X
<b>r</b> Other transfer of cash or property to related organization(s) .....	X	
<b>s</b> Other transfer of cash or property from related organization(s) .....		X

**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	
(3)			
(4)			
(5)			
(6)			





**Part VII** Supplemental Information.

Provide additional information for responses to questions on Schedule R. See instructions.

**PART II, IDENTIFICATION OF RELATED TAX-EXEMPT ORGANIZATIONS:**

**NAME OF RELATED ORGANIZATION:**

REAL ESTATE FOUNDATION OF SAN LUIS OBISPO COUNTY

**DIRECT CONTROLLING ENTITY:** THE COMMUNITY FOUNDATION SAN LUIS OBISPO COUNTY