

Laguna Niguel Military Support Committee AGENDA

REGULAR MEETING OF July 19, 2021 - 12:00 p.m.

WELCOME TO YOUR MILITARY SUPPORT COMMITTEE REGULAR MEETING!

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

Zoom Meeting Participation Information – July 19, 2021, 12:00 PM:

- 1.Please click the following link to participate in the meeting: https://cityoflagunaniguel-org.zoom.us/j/85984641629?pwd=bG5LVmZsSk1uMlVPeHh1dW1ZU1NqUT09
- 2. If you do not join with computer audio, you can participate via telephone: US: +1 888 475-4499; ID: 859 8464 1629 Password: 851253 When the time for public comment is introduced for the item on which you wish to speak, press *9 and let us know you wish to speak.
- 3. Members of the public who wish to make a comment on a specific agenda item, may submit their comment via email to the committee clerk at tluketich@cityoflagunaniguel.org. Comments received by 10:00 a.m. on the date of the meeting will be provided to the Committee Members and will be part of the meeting record.

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

City Hall 30111 Crown Valley Parkway (949)362-4300 Fax (949)362-4340 www.cityoflagunaniguel.org

CALL TO ORDER

ROLL CALL

INVOCATION – Committee Member Hoskins

PLEDGE OF ALLEGIANCE – Committee Member Caldwell

PRESENTATIONS

PUBLIC COMMUNICATIONS

DISCUSSION ITEMS AND PRESENTATIONS

1. Foundation Financial Report

Recommendation

Receive and file report.

2. City Military Support Committee Account

Recommendation

Receive and file report.

3. Minutes of the Regular Military Support Committee Meeting on June 21, 2021

Recommendation

Approve as written or amended.

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

Recommendation

Hear reports.

5. Update on September 11, 2021 Car Wash

Recommendation

Hear Update.

6. Discuss and Approve Major Fundraiser for 2021

Recommendation

Discuss and approve.

7. Report on Fundraising from the Corporate Donor Committee

<u>Recommendation</u>

Hear report.

8. Report on Fundraising from the Letter Writing Committee

Recommendation

Hear report.

9. Discuss and Approve a Not to Exceed Amount for the Purchase of Remittance Envelopes.

Recommendation

Discuss and approve.

10. Discuss and Approve Temporarily Reassigning Members of the Major Fundraiser Sub-Committee to Either the Corporate Donors or Letter Writing Sub-Committees to Assist with the Solicitation of Donations and Mailing of Letters.

Recommendation

Discuss and approve

11. Discuss and Approve a New Logo for the Military Support Committee

Recommendation

Discuss and approve.

12. Committee Reports

Recommendation

Hear reports

ADJOURNMENT

LAGUNA NIGUEL MILITARY SUPPORT COMMITTEE

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

Daniel Abrams Kathy Khalifa Reed Malleck Carole Allen Frank McGrath Melissa Caldwell **Caroline Swift** Elena Faita-Nguyen **Bill Sundin Debra Garnreiter David Tuma John Harms** John Ulrich **Lynn Hoskins David Weiss** John Humphrey

Stephanie Winstead Matt Kenney

Sebrina King, First Battalion, Fourth Marines Command Master Chief Eli Robles, USS Stockdale LT Col Dan Goldsmith, 1st Assault Helicopter Battalion, 140th Aviation Regiment Adam Liquori, Laguna Niguel Military Support Foundation Representative

Email address.....info@Inmilitarysupport.org

Website address.....www.Inmilitarysupportfoundation.org

AFFIDAVIT OF POSTING

COUNTY OF ORANGE) CITY OF LAGUNA NIGUEL)

I, TAMBERLYN LUKETICH, POLICE SERVICES SECRETARY, hereby certify, under penalty of perjury, that I caused the posting of this agenda by 12:00 p.m. on Friday, July 16, 2021 at City Hall, 30111 Crown Valley Parkway, Crown Valley Community Park, 29751 Crown Valley Parkway, and Sea Country Senior and Community Center, 24602 Aliso Creek Road.

POSTED BY:

Foundation Financial Report

Agenda Item No. 1

11:53 AM 07/10/21 Cash Basis

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

	May 21
Ordinary Income/Expense	
Expense	
60000 · Program Expenses	3,302.92
70000 · Management & Admininstrat	150.00
Total Expense	3,452.92
Net Ordinary Income	-3,452.92
Net Income	-3,452.92

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

ASSETS Current Assets Checking/Savings 10100 · US Bank Checking 10110 · Unrestricted Amounts 10125 · 1 · 4 Marines 15,212.35 10130 · USS Stockdale -546.98		May 31, 21
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	TOTAL LIABILITIES & EQUITY	54,515.63

11:58 AM 07/10/21 Cash Basis

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

Date	Num	Name	Memo	Paid Amou
Exp	61100 · Su	Expense gram Expenses appliesPgm Exp Gonzalez, Kayla Gonzalez, Kayla Covington, Susan	1-4 Marines Kickball Equipment 1-4 Marines, Kickball Jerseys Reimb - 1-4 Mar Gold Star Parents Housing	207.04 252.00 1,940.00
05/28/202		King, Sebrina	1-4 Mar_Homecoming Snacks Reimb	692.97
-	Total 6110	0 · SuppliesPgm Exp		3,092.01
То	tal 60000	· Program Expenses		3,092.01
Tota	l Expense			3,092.01
Net Ordi	nary Incon	ne		-3,092.01
Net Incom	ne			-3,092.01

City Military Support Committee Account

Agenda Item No. 2

Laguna Niguel, CA

Detail vs Budget Report Account Detail Date Range: 07/01/2020 - 06/30/2021

	;								9
	Лате		Encumbrances	Fiscal Budget	Beginning Balance	Total Activity	Ending Balance	Budget Kemaining	% Kemaining
	Military Support		0.00	2,500.00	00:00	1,051.63	1,051.63	1,448.37	57.93 %
Packet Number	Source Transaction	Pmt Number	Description		Vendor		Project Account	<u> </u>	Amount
	8/6/20 Luketich	7450	Visa charges for Tamberlyn Luketich	n Luketich	2667 - U.S. BANK NATIONAL ASSOCIATION	AL ASSOCIATION			42.52
	JN04241		LN Military Support Foundation - Reimbursement for USS Stockdale - Baby Gift Cards purchase (Luketich Cal Card Sept 2020 Statement)	dation - tockdale - Baby Gift Cal Card Sept 2020					-939.60
	9/6/20 Luketich	7588	Visa charges Tamberlyn Luketich	uketich	2667 - U.S. BANK NATIONAL ASSOCIATION	AL ASSOCIATION			939.60
	JN04416		LN Military Support Foundation - Reimbursement for Baby Gift Cards and Shipping (McDaniel Cal Card 9/6/20 Statement)	dation - Gift Cards and ard 9/6/20					-782.40
	9/6/20 McDaniel	7588	Visa charges for Matt McDaniel	Daniel	2667 - U.S. BANK NATIONAL ASSOCIATION	AL ASSOCIATION			782.40
	28455	7577	Printing for Military Support Committee	ort Committee	1041 - SOLINK INC.		CON0601000		297.39
	10/6/20 Luketich	6777	Visa charges for Tamberlyn Luketich	/n Luketich	2667 - U.S. BANK NATIONAL ASSOCIATION	AL ASSOCIATION			7.20
	12/7/20 Luketich	8133	Military Support cards/gift cards	ft cards	2667 - U.S. BANK NATIONAL ASSOCIATION	AL ASSOCIATION			690.12
	1/6/21 Luketich	8301	Military support supplies		2667 - U.S. BANK NATIONAL ASSOCIATION	AL ASSOCIATION			14.40
	JN05145		LN Military Support Foundation - Reimbursement for Painting with a Twist (Luketich Cal Card 3/8/21 Statement)	dation - ing with a Twist Statement)					-546.98
	JN05154		Various - Reimbursement for shirt orders (Westway Inv #210412)	for shirt orders					-105.00
	3/8/21 Luketich	8642	Military Support Committee	tee	2667 - U.S. BANK NATIONAL ASSOCIATION	AL ASSOCIATION			546.98
	210412	8774	Shirts for Military Support Committee	t Committee	1809 - MARJORIE S. MCKERNAN	RNAN			105.00
		Rep	Report Total: 0.00	2,500.00	00:00	1,051.63	1,051.63	1,448.37	57.93 %

7/2/2021 6:00:24 AM

Detail vs Budget Report

		- 1	1,051.63	0.00	2,500.00	0.00	Military Support	100-01-5750
% Remaining	Budget Remaining	Ending Balance	Total Activity	Beginning Balance	Fiscal Budget	Encumbrances	Name	Account

mmary	% Remaining	57.93 %	57.93 %
Account Summar	e Budget Remaining % Remaining:	1,448.37	1,448.37
	Ending Balance	1,051.63	1,051.63
	Total Activity	1,051.63	1,051.63
	Beginning Balance	00:00	0.00
	Fiscal Budget Be	2,500.00	2,500.00
	Encumbrances	0.00	0.00
			Report Total:
	Name	Military Support	
1	Account	100-01-5750	

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

Detail vs Budget Report

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

Fund Summary

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

Minutes of the Regular Military Support Committee Meeting on June 21, 2021

Agenda Item No. 3

MINUTES OF THE CITY OF LAGUNA NIGUEL MILITARY SUPPORT COMMITTEE REGULAR MEETING JUNE 21, 2021 @ 12:00 p.m.

CALL TO ORDER Co-Chair Rains called the Regular Meeting of the City of Laguna Niguel Military Support Committee to order at 12:00 p.m.

ROLL CALL

Present Dan Abrams, Carole Allen, Melissa Caldwell, Elena Faita-Nguyen,

Debra Garnreiter, Lynn Hoskins, John Humphrey, Matt Kenney, Kathy Khalifa, Reed Malleck, Frank McGrath, Bill Sundin, Caroline

Swift, David Tuma, John Ulrich, Stephanie Winstead,

Councilmember Sandy Rains, (Co-Chair), Councilmember Rischi

Paul Sharma (Co-Chair)

Christina Garrison, Ombudsman, USS Stockdale

Sebrina King, 1st Battalion, 4th Marines

Tabby Jones, USS Stockdale FRG President

Robert Ming, Military Support Committee Foundation

Absent John Harms, David Weiss

City Staff Russell Narahara, Senior Management Analyst

Tamberlyn Luketich, Police Services Secretary

INVOCATION Committee Member Ulrich led the Invocation.

PLEDGE OF

ALLEGIANCE Committee Member Allen led the Pledge of Allegiance.

PRESENTATION

None

PUBLIC COMMUNICATIONS

None

DISCUSSION ITEMS

1. Foundation Financial Report

Report received and filed.

2. City Military Support Committee Account

Tamberlyn Luketich, Police Services Secretary, was available for questions.

Report received and filed.

3. Minutes of the Regular Military Support Committee Meeting May 17, 2021

A MOTION was made by Committee Member Abrams, seconded by Committee Member Allen to approve the Minutes of the May 17, 2021 Regular Meeting of the Military Support Committee.

Motion Carried 17-0-3, with Committee Members Harms, Weiss and Khalifa being absent. (Committee Member Khalifa arrived after the Motion on Minutes)

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

Sebrina King, 1st Battalion, 4th Marines stated the classrooms will be starting up again. Post deployment leave begins this week and they will be back on July 12th. She will send out a link so committee members can order a t-shirt and base pass procedures were reviewed. The Marine Corps Ball will be on November 6th at Ceasars Palace in Las Vegas and once a flyer is available, Sebrina will send it to Secretary Luketich.

Christina Garrison, Ombudsman, USS Stockdale sated that the Sailors just had time off prior to deployment and are currently preparing for deployment. The sweatshirts and t-shirt orders will be coordinated with Committee Member McGrath.

5. Discuss Birthday Ball and Request Assistance with Mementos, Additional Bar Tender Fees, Fire Marshall Fee and other Incidentals, not to Exceed \$15,000.00.

Sebrina King, 1st Battalion, 4th Marines has a check for \$700.00 to give to the Military Support Foundation. Co-Chair Sharma inquired what the average cost was that the Military Support Committee has approved, in the past, for this event. Sebrina stated that the average for this event is approximately \$10,000.00.

A MOTION was made by Committee Member Abrams, seconded by Committee Member Faita-Nguyen to approve the request for assistance with mementos, additional bar tender fees, Fire Marshall fee and other incidentals for the Birthday Ball, not to exceed \$15,000.00.

Motion Carried 18-0-2, with Committee Members Harms and Weiss being absent.

6. Discuss Car Wash and Possible Date

Committee Member McGrath asked Sebrina King for some potential dates. Sebrina stated that September 11, 2021 is available. Committee Member McGrath

will check with Plaza de la Paz for availability for the car wash and check on other potential dates.

A MOTION was made by Committee Member McGrath, seconded by Committee Member Khalifa to approve a car wash to be held on September 11, 2021 or an alternate date to be coordinated with the 1st Battalion, 4th Marines. **Motion Carried 18-0-2**, with Committee Members Harms and Weiss being absent.

7. Discuss Baby Gifts

Committee Member Faita-Nguyen is requesting gift cards for \$150.00 each. Committee Member Allen asked if the baby items the committee currently has, have been inventoried. Committee Member will be available to meet committee members to establish what is available in storage.

A MOTION was made by Committee Member Garnreiter, seconded by Committee Member McGrath to approve four gift cards in the amount of \$150.00 each. Motion Carried 18-0-2, with Committee Members Harms and Weiss being absent.

8. Discuss Fundraising Efforts/Corporate-Individual Fundraising and Approval of Donation Letter/Envelope

Committee Member Malleck reviewed the logistics for fundraising and is requesting approval of the donation letter/envelope. Co-Chair Rains clarified that monies spent for printing would come from the Military Support Committee's Funds. Co-Chair Rains asked Secretary Luketich, logistically, who would handle tracking letter, payments, donations, etc. Secretary Luketich stated that the Letter Writing Committee would be the committee to handle the logistics. Committee Member Caldwell volunteered to handle the tracking/reporting and logistics of the donations, letters sent, and thank you letters. Co-Chair Rains suggested that Committee Members Malleck and Khalifa work with the Letter Writing Committee as a Sub-Committee to operate in tandem and develop a process for actions and plans. Co-Chair Sharma submitted the letter to Robert Ming for approval and there were no revisions from the Military Support Foundation. Co-Chair Sharma requested that the Foundations' website, on the envelope, have a capital "LN".

A MOTION was made by Committee Member Caldwell, seconded by Committee Member Allen to adopt the letter for corporate donations and remittance envelope, after revisions are made, per the recommendations of the committee. **Motion Carried 18-0-2**, with Committee Members Harms and Weiss being absent.

9. Request to use the Laguna Niguel Military Support Foundation's PayPal, combined with Eventbrite, for Ball Ticket Sales

Sebrina King, 1st Battalion, 4th Marines is requesting electronic payments through PayPal for Ball Ticket Sales. Co-Chair Rains suggested that Sebrina write a letter to the Military Support Foundation requesting approval of using their website for PayPal transactions.

10. New Logo Selection for the Military Support Committee

Co-Chair Sharma discussed the various logos. Committee Members gave their feedback on the various designs and verbiage. Co-Chair Sharma will submit revised options of the logo at the next meeting.

A MOTION was made by Committee Member McGrath, seconded by Committee Member Ulrich to make modifications of logo to present at next meeting.

Motion Carried 18-0-2, with Committee Members Harms and Weiss being absent.

11. Review of Operational Guidelines for the Military Support Committee

Co-Chair Rains thanked Russell Narahara and Robert Ming for their help with the operational guidelines.

A MOTION was made by Committee Member Sundin, seconded by Committee Member Khalifa to adopt the operational guidelines as written and once a new Military Support Committee logo has been approved.

Motion Carried 18-0-2, with Committee Members Harms and Weiss being absent.

12. Committee Reports

Committee Member Allen is requesting that the Co-Chairs of sub-committees please keep all sub-committee members notified of activities within that sub-committee. Committee Member Hoskins discussed reaching out to schools, PTA, youth groups, church and community groups for cards to be written for the Military. The Letter Writing Committee would also like the Military Support mailbox to be moved to the Community Center. Co-Chair Rains asked Committee Member Hoskins to please add moving the mailbox as an agenda item for Military Support Committee approval.

ADJOURNMENT

There being no further business before the Committee, Co-Chair Rains adjourned the meeting at 1:30 p.m. to the Regular Military Support Committee Meeting to be held on July 19, 2021, at 12:00 p.m. via Zoom.

Report on Fundraising From the Corporate Donor Committee

Agenda Item No. 7

Update 19 July 2021 Joint Report; Letter Writing Committee and Corporate Donor Committee

While we're waiting for the logo (gating item for Donor Letter/Remittance Envelope campaign), we:

1) Are polling all LNMSC members to create/update 'warm' list of potential donors:

- Prior donors
- City contractors; (we understand this should be 'organic' in nature; for discussion)
- Personal contacts
- Other

It would be most effective for people on these lists to be contacted by phone before receiving letter solicitation; we will assign Committee members to call based on existing relationships where possible (see Next Steps below)

2) Created a spreadsheet to track all donors & LNMSC required follow-up

We've captured all the elements we have discussed in prior LSMSC Meetings Short demo

Next steps

- Begin to assign potential donor names for Committee members to call
- Assign an owner of the donor tracking spreadsheet/activity (Tamberlyn?); begin to populate
- Coordinate with changes to Donor section of website, and coordinate tracking going forward
- Complete Donor Letter and Remittance Envelope following approval of new Logo
- Send Donor letter to warm contacts following calls; to other potential donors as appropriate

Laguna Niguel Military Support Committee

Donor Tracking

Rev 1.0 07/02/2021

Instructions:

To enter more than one line in a cell (eg for name, address etc), press 'control' and 'enter'

If there has been a prior dotation (column E), we need to check if it has been acknowledged. If there has been a prior dotation (column E), we need to check if it has been acknowledged. Once we know a thank you has been sent we can check the "Done" box (column F) and it will turn green. In this example, we have thanked Joe Smith and Derek Jeter, but we haven't yet thanked Mary Jones or Herbert Hoover. If we receive a donation (column I), we have to send an acknowledgment. When that's done, enter date sent in column J and it turns green in this example, we have thanked Joe Smith, but he's the only one so far. We also have to send a donation receipt to the donor (column K). In this example we have also sent the form to Joe Smith If donor has indicated they wish to honor or memorialize someone (column M), we have to make note of that (website or other). Once we have dispositioned that honorarium, we can check the "Noted" box (column N) and it will turn green in this example, we have noted the honorarium for Tom Jones, but not Marilyn Monroe. If donor has indicated a specific unit or activity (column P), we need to direct the Sis as indicated, and confirm (column Q). We've not yet dispositioned this for the Herbert Hoover donation slated for the Marines unit (column T) and box will turn green if donor has indicated they are donating via estate plan (column S), we need to take hole of didisposition that (column T) and box will turn green.		
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If we receive a donatic in this example. Ver also have to send if donor has indicated Once we have dis in this example, if donor has indicated We've not yet directed if donor has indicated if donor has indi		In this example, we have thanked Joe Smith and Derek Jeter, but we haven't yet thanked Mary Jones or Herbert Hoover
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We also have to send If donor has indicated Once we have dis In this example, If donor has indicated We've not yet di		In this example, we have thanked Joe Smith, but he's the only one so far
If donor has indicated Once we have dis In this example, If donor has indicated We've not yet di If donor has indicated		We also have to send a donation receipt to the donor (column K). In this example we have also sent the form to Joe Smith
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In this example, If donor has indicated We've not yet di		Once we have dispositioned that honorarium, we can check the "Noted" box (column N) and it will turn green
If donor has indicated We've not yet di If donor has indicated		In this example, we have noted the honorarium for Tom Jones, but not Marilyn Monroe
We've not yet dispositioned this for the Herbert Hoover donation slated for the Marines unit If donor has indicated they are donating via estate plan (column S), we need to take note of/disposition that (column T) and box will turn green	Directed Donations	If donor has indicated a specific unit or activity (column P), we need to direct the \$\$ as indicated, and confirm (column Q)
If donor has indicated they are donating via estate plan (column S), we need to take note offdisposition that (column T) and box will turn green		We've not yet dispositioned this for the Herbert Hoover donation stated for the Marines unit
		If donor has indicated they are donating via estate plan (column S), we need to take note of/disposition that (column T) and box will turn green

Name, Company (if applicable), LNMSC Contact(s)	able), LNMSC		Prior Donations & thank-you		New Donatio	ns, Thank-yo	u, Donation F	Receipt	New Donations, Thank-you, Donation Receipt In Honor of, in Memory of		Directed Donations	tions	Estate Plan		
Name, Address, Phone	Сомрапу	LNMSC Contact	Prior Donation/ amount and date	Thank-you sent?	Date Donor	Donation received?	Thank-you R	Donation Receipt II Sent?	In Honor or in Memory of?	Noted?	Specific military unit or LNMSC activity?	Identified in Budget?	Via Estate Plan?	Noted?	Notes
	ACME Rockets			×			07/12/2021 0	01	In Honor of Tom Jones		USS Stockdale X	×		15	
ne CA 92677			\$3,000,000 Sep 2020		07/04/2021	\$1,000,000 07/05/2021		= 2	In Memory of Marilyn Monroe						
Herbert Hoover 16 Pennsylvania Ave Washington, DC 01100 (001) 241-2414	US Gov't	ett			07/04/2021	\$1.00					1st Battalion 4th Marines		Yes	×	
Derek Jeter New York Yankees Yankee Stadium, NY 00110 (978) 394-5943	New York Yankees	Mary Marvelous	\$400,000	×	07/04/2021						Toy drive	×	Yes		
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Discuss and Approve a New Logo for the Military Support Committee



