



Stu News Laguna

Stu Saffer's Laguna Beach News and Community Forum



Laguna Beach Community Foundation Year in Review



Board of Trustees photo was taken at their December board meeting at the Laguna Beach home of Mary and Joe Ferguson and includes (left to right):

Nicole Anderson, Jerry Bieser, Board of Trustees Chair Rick Balzer, Mary Ferguson, Donnie Crevier, Tom Davis, Jim Fletcher, Lisa Mansour, John Mansour, Jane Egly, President and CEO Darcy Loveland, and Lyneé Kniss. * Not pictured- Treasurer and Founding Chair Laura Tarbox

The Laguna Beach Community Foundation (LBCF), established to encourage philanthropy, provides expertise and resources to assist local charities, connects donor passions with the missions and activities of nonprofits, and partners with local professional advisors in assisting their clients in giving now and beyond their lifetimes with legacy gifts.

Key highlights and accomplishments in 2013 include:

Board of Trustees

Community leader and businessman, **Rick Balzer**, was elected as Board Chair and helped grow the board to thirteen passionate and dedicated trustees.

New Trustees, Tom Davis, Esq. and Jerry Bieser were appointed at the end of 2013.

Grants

LBCF contributed over \$408,000 in 2013 through 72 grants to nonprofits in Laguna Beach and across the country.

In partnership with the Charitable Fund donors Laguna Beach Community Foundation has contributed over \$2.7 million through 230 grants to nonprofits since 2010.

Charitable Funds

Laguna Beach Community Foundation manages 29 charitable funds with more than \$2.4 million in charitable assets including: the Laguna Beach Community Enrichment Fund; Claes Andersen Hospitality Scholarship Fund; a Disaster Fund; the recently established Laguna Beach Police Officer Memorial Artwork Fund; four Nonprofit Funds; and 20 Donor Advised Funds established by individual or private foundations.

In 2013, LBCF doubled its number of Donor Advised Funds (DAFs). Additional contributors will be establishing DAFs early in 2014 with cash or stock gifts.

The Laguna Beach Community Enrichment Fund was established in 2012 with a generous Founders Circle contribution of \$100,000 from Founding Chair, Laura Tarbox. Current Chair, Rick Balzer, is close to fulfilling his \$100,000 Founders Circle commitment made in 2013.

Workshops

LBCF sponsored four free workshops at the Susi Q Senior Center in 2013 including two nonprofit organizations based on the theme *Making Your Nonprofit Newsworthy* and two workshop series provided by **Peter Kote** including *It's Your Money* and *It's your Estate*.

Local nonprofit and executive leaders participated in the *Board Chairs Academy*, a five session series co-sponsored by the Community Foundation and presented by **Jeffrey Wilcox, Third Sector**.

Professional Council

Co-chaired by **Nicole Anderson, Esq.** and **Lyneé Kniss, Esq.**, the Professional Council includes 55 charitable minded professionals who live or work in Laguna Beach and work to increase awareness of the LBCF and further the mission of enhancing philanthropy in Laguna Beach.

The Professional Council sponsored the free seminar, *Learn How to Become a Leader in Charitable Tax Planning*, by **Nicole Anderson, Esq. and Randy Huston, CFP**.

CEO Transition

As 2013 comes to an end, so too will the current professional leadership of Laguna Beach Community Foundation. **Darcy Loveland, Esq.**, President and CEO of the Laguna Beach Community Foundation since 2011, announced in mid-October that she would be retiring from the Community Foundation in early January 2014 due to family health issues.

Loveland recently expressed, "It has been an honor to serve Laguna Beach, work with the dedicated Board of Trustees and partner with our incredibly generous and passionate donors to make a difference to nonprofits in Laguna Beach and across the country. I am confident that the Laguna Beach Community Foundation will grow to greater heights in the years that follow and will continue to provide valuable resources to our community."

Longtime Laguna Beach resident and nonprofit executive **Robin Walker** will serve as interim director until a permanent replacement has been secured.

For more information about Laguna Beach Community Foundation or the open position, call 949.715.8223 or visit

www.lagunabeachcf.org

From a press release

http://www.stunews Laguna.com/index.php?option=com_content&view=article&id=10624:laguna-beach-community-foundation-010314