



must!
charities

annual report

2017

must!

charities is driven by a collaboration of friends and business owners dedicated to improving quality of life in San Luis Obispo's North County through empowering local organizations to make strategic change that creates long-term, sustainable transformation within the region.





small beginnings

Like a tiny acorn, ideas start small, but can grow into large, impactful initiatives that can influence the surrounding environment. must! charities was formed the same way. What started as an idea formed by a group of friends and business leaders has developed into a vehicle to collectively foster change, transform, encourage, and build a stronger community here at home.

Our desire was to keep local donations just that - local. Here in our county, communities are in need of revitalization, and we believe we all have a stake as well as a responsibility to help our own neighbors. By streamlining donations, we make a bigger impact.

Going a step beyond simply gathering financial resources, we leverage our connections within the community in order to influence positive, real change where it is needed most. By collaborating with local non-profits in a strategic focused giving effort, we have the ability to create a ripple effect of comprehensive change. Working together as a community united in this purpose will transform our community now, as well as for future generations to come.

WE ARE ROOTED IN 4 AREAS

Collaboration
Accountability
Comprehensive Change
Sustainability

life of a project

must! donors depend on us to invest their dollars wisely. We promise to be accountable for each investment. We use an innovative approach to giving, rather than giving traditional grants. We fund organizations who are the most effective at dealing with our greatest community needs working closely to analyze and ensure benchmarks are being met along the way.

1 Identify the Community Need

We gather information & statistics, meet with officials and experts, and review various community, state, and national reports.

2 Identify Organizations Addressing the Community Need

3 Vetting Process of the Organizations (can take 1-2 years)

We look for ways to effectively impact our partner organizations along with those they serve. We look to invest in learning and growth for the organization.

4 Identify Opportunities

We look to foster organizational development, accountability, creative & critical thinking, challenging our partners to think outside the box when addressing social needs in our community.

5 Cast The Vision

Goals are set by the organization, and measurable benchmarks identified. Official Memorandum of Understanding drawn up with our legal team.

6 Partnership Launch

(An adaptive approach that can change along the way based on outcomes and circumstances). Communication and teamwork is imperative for success. We are active in the organization, attending meetings and serving on boards.

7 Funding

Starts off big in the beginning then slowly decreases over time. Everyone needs a jump start, and then time to build their own funding stream. This creates sustainability and longevity of the organization's success.

8 Metrics and Outcomes

We hold organizations accountable. We review quarterly reports and funding is released as goals are attained. We have the ability to end a partnership early if benchmarks are unmet or a roadblock is revealed ultimately preventing the organization from moving forward successfully.

9 Ultimate Goal

Final reference point for success is based on the organization's ultimate mission and clear ability of the project's sustainability without must! funding and support.

project impacts

COURT APPOINTED SPECIAL ADVOCATES (CASA)



128
CHILDREN SERVED

BIG BROTHERS BIG SISTERS



70
MENTOR MATCHES

BOYS & GIRLS CLUB



524
YOUTH IN 2 LOCATIONS
with Summer &
After-School Programs

EL CAMINO HOMELESS ORGANIZATION (ECHO)

2017 RESULTS

35 Individuals & 17 Families found permanent housing

LEADERSHIP & STAFF INVESTMENTS

- Board Development Training & Recruitment
- Strategic Planning Session Completed with 10 Year Vision Cast with Years 1-3 Goals in Place to Guide the Direction
- Staff Development Trainings
- Improved Staff Compensation & Health Benefits
- Contract with HR Specialist
- Contract with Leadership & Management Consultant

CAPITAL INVESTMENTS



2017 financials

Below is a snapshot of our 2017 unaudited year-end financial status. Our Executive Board provides for all general and administrative costs, so that 100% of your donations go right to the need.

TOTAL NET ASSETS, JANUARY 1, 2017	
Non Executive Board Contributions**	718,437
Executive Board Contributions*	181,674
Total Revenues	900,111

2017 REVENUES [^]	
Non Executive Board Contributions**	338,612
Executive Board Contributions*	205,801
Total Revenues	544,413

EXPENSES	
Collaborative Giving*** (money gifted through our projects)	433,744
Overhead and Operational Expenses	185,582
Total Expenses	619,326

NET INCOME	
Non Executive Net Income	(95,132)
Executive Net Income	20,219
Total Net Income	(74,913)

TOTAL NET ASSETS, DECEMBER 31, 2017	
Non Executive Board	613,020
Executive Board	204,015
Total Net Assets	817,035

* 100% of Exec. Board Revenue pays for G&A Expenses.

** All Non-Exec. Revenue goes towards Collaborative Giving.

*** Collaborative Giving shown does not include the total \$ commitment made over multiple years.

[^] Revenue listed represents cash only and does not reflect in-kind and un-sold stock donations that appear on our form-990.



donor gratitude

THE FOLLOWING IS A LIST OF OUR 2017 DONORS

15C Wine Shop & Bar
Adelaida Cellars
All About Events
Allegretto Vineyard Resort by Ayres
Alsup Family
American General Media
Andre, Morris & Buttery
Anji Perry
Ann Leonard
Art & Lynn Kishiyama
Baker Wine & Grape Analysis
Barry Goyette
Bella Luna Winery
Berna Dallons
Better Produce, Inc.
Booker Vineyards
Bradford Bogel
Brian & Sheri Leveille
Bruce Smitham
Caliza Winery
Carolyn S. Kruse Foundation
Cass Winery
Cecily Ray
Central Coast Live
Children's House Montessori School
Jog-A-Thon 2017*
Chuck & Marilyn Hope
Clever Concepts
Compli Beverage Compliance
Cooperages 1912
Cynthia Lohr
Dagny Peterson
Dan & Joanne Peterson
Davis & Stacie Hyde
Davis Hyde
Derby Wine Estates
Don & Elaine Witmer
Don & Leeda Johnson
Doug & Sabrina Kruse
Elizabeth Crabtree
Enartis
Encor Glass
Epoch Wine Estates
ETS Laboratories
Farm Credit West

Four Lanterns Winery
Friar's Club Roast 2017*
Halter Ranch Vineyard
Heart to Heart Real Estate, Inc.
Home & Ranch Sotheby's Int'l Realty
Hope Family Wines
Il Cortile Ristorante
Isabel De Ballard
Ivan Zucker
J Dusi Wines
J. Lohr Vineyards & Wines
Jack Creek Cellars
Jade Architecture
James P. Sargen
Jeff Meier
Jim & Judy Wells
Judith Starr
Julia Holsted
Kennedy Club Fitness
Kennedy Wilson
Kingsley Burns
Koene Graves
Kristen Barnhisel
Kyle Beal Wommack Consulting
L'Aventure Winery
La Cosecha
Laffort USA
Larry Smyth
Law Wine Estates
Le Grand Oak
Leanne Swanson
Ledge Vineyards
Lerno Construction
Les & Yvonne Toma
Linda Gray
Lisa Lewis
Long Hill Ranch & Vineyard
Longcrier & Associates
Mace Security Alarms
Mark & Michele Cotta
Matt & Annie Browne
McPhee's Grill
Michael & Lori Bickel
Michael Dusi Trucking
Mike & Peggy Zappas

Morris & Garritano
Mount Family
Nancy Fiske
Niner Wine Estates
Nino's Grill
Norcast Communications
Pacific Premier Bank Inc.
Parish Family Vineyard
PASO Magazine
Paso Robles Ford
Paul & Katie Winkler
Pebble & Terry Smith
Photography by Jean Pedigo
Rabobank
Randy & Becky Gray
ReMax Parkside Realty
Reta Burkes
Richard Bays
Rigg Family
Roscoe Myrick
Salon Roux
San Luis Obispo Cattlewomen's
Association
San Luis Obispo County Garbagemen's
Association
Sarah Copen
Saxum Vineyards
Sierra Christensen
Signe Zoller
Solterra Strategies
Spirit Winds Physical Therapy
StaVin, Inc.
Stephen & Susan McAbee
Stifel - McAbee Leveille Wealth
Management
Surina Construction Company, Inc.
Tablas Creek Vineyard
Ted Alrich
Templeton Women's Civic Club
Terra Mia
Terrace Hill Olive Oil Company
Terry & Sue Minshull
TH Estate Wines
Thacher Winery & Vineyard
The Sign Place

The Turrentine Brokerage Team
The Winemakers Series
Thompson Trading Company
Tim Kensinger
Torrin Vineyards
Treana Winery "The Golf Tournament" 2017*
Trumpet Vine Catering
Ueberroth Family Foundation
Umpqua Bank
Venteux Vineyards
Vineyard Industry Products
Vineyard Professional Services
Ward Family Trust
Windward Vineyard
Wonderful Giving

IN MEMORY OF

**We lost the following individuals
whose legacy will continue through
must! charities project giving**

Annette Cassidy
Bibiche Peck
Dollie DuVal
Jack Peschong
Joseph "Jack" Morales
Katie Warner
Ted Burgess

** A complete list of event patrons can be found on our website along with a list of all honorary donations.*

ways to get involved

MAKE A GIFT

Make a one time or monthly recurring donation, or create an annual business model that makes giving easy.

MATCH YOUR GIFT

Look into your employer's match giving program or ask if they will match your donation.

CELEBRATE A MILESTONE

Celebrating a birthday or anniversary? Ask friends to make a gift donation in your honor.

TEACH THE NEXT GENERATION

Make giving a part of your child's life... match their giving or create fun ways to put aside money to give. We'll send you stories to share so they can see how their money is helping others.



must! *charities*

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