



THE *Community* FOUNDATION

SAN LUIS OBISPO COUNTY

2013 ANNUAL REPORT



Celebrating 15 years supporting people and places across San Luis Obispo County



Dear Friends,

Welcome to our annual report. This year we are incorporating two important communication tools: a printed version and an online version you can find on our website. Embracing the present while respecting our past, we hope to improve and increase our communications efforts to you, our special donors and friends.

Last year brought important changes. We bid farewell and thank you to Barry VanderKelen, who was our executive director for seven years, and we embarked on a nation-wide search for a new CEO by utilizing the wisdom of a special committee of past and present board members and donors.

While the search was conducted, Claire Clark stepped off our board to assume the role of Interim Chief Executive Officer. Claire worked tirelessly with our board and staff to ensure a smooth transition.

In May of 2014, we welcomed our new Chief Executive Officer, Heidi H. McPherson. Heidi's background includes 25 years of experience as a nationally recognized leader in the philanthropic community. Her skills and passion will raise The Community Foundation to a new level of service in our county.

Saving the best for last—in 2013 we recognized our 15 years of grantmaking to make a difference for the people and places in our county. Thank you for joining with us to make a difference today and tomorrow.



Ann Robinson

Ann Robinson
Board President



Heidi H. McPherson

Heidi H. McPherson
Chief Executive Officer



2013–2014 BOARD OF DIRECTORS

Ann Robinson, President, *San Luis Obispo*
Steve McCarty, Vice President, *San Luis Obispo*
Bill Raver, Treasurer, *Morro Bay*
Nick Thille, Secretary, *San Luis Obispo*
Jim Brabeck, *Los Osos*
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Barbara Partridge, *Paso Robles*
Tom Sherman, *San Luis Obispo*
Johnine Talley, *Arroyo Grande*
Mary Verdin, *Arroyo Grande*

PAST BOARD PRESIDENTS

Jane Sinton, 1998-2001
Dean Miller, 2001-2003
Julian Crocker, 2003-2005
Lyn Baker, 2005-2007
John Dunn, 2007-2009
Wendy Brown, 2009-2011
Dee Lacey, 2011-2013

2013 FUNDS

Each year we are honored to welcome new funds to our Community Foundation family. From funds that have direct impact now, to permanently endowed funds that will support our community in perpetuity, you can choose from a variety of funds. Our three main types of funds are donor advised, field of interest and agency funds, all of which are important to the growth and vitality of the people and places we serve. Find out more about all of our funds by visiting our website, www.cfsloco.org.

Listed below are two of our new funds for 2013.

YOUTH OPPORTUNITIES FUND

The Youth Opportunities Fund is an example of a donor advised field of interest fund established in 2013 to support the young people in our county.

Focused on at-risk youth ages 14 to 24, this fund, established by a thoughtful anonymous donor, supports participation in programs offering career mentorship, career exploration, and skills development to help youth successfully transition into the workforce. One grant from this fund is supporting the Bakari© Mentoring Program at Cal Poly.



In partnership with local school districts throughout the county and the Sheriff's Office, this program is working with youth between the ages of 14 and 17 who may be vulnerable to entering the juvenile justice system. Since January 2012, more than 35 high school youth have graduated from the program. The Youth

Opportunities Fund grant is supporting the staff and supplies needed to help 50 youth in this program with job readiness and professional development.

FRIENDS OF THE ELEPHANT SEAL



In 2013, The Friends of the Elephant Seal established an endowed agency fund to support their efforts to preserve the Piedras Blancas Elephant Seal Colony and the volunteer docent program.

For over 16 years, The Friends of the Elephant Seal volunteer docents have been at the vista point overlooking the colony that is located north of San Simeon on the Central Coast. They help visitors better understand these marine mammals and share information about the natural history of the seals. Each visitor leaves with a greater appreciation of these amazing creatures and a greater respect for all of our wildlife.

GRANTS & INITIATIVES

In 2013, The Community Foundation, together with our fund holders, awarded 405 grants valued at more than \$1.4 million. The following are a few of our special initiatives.



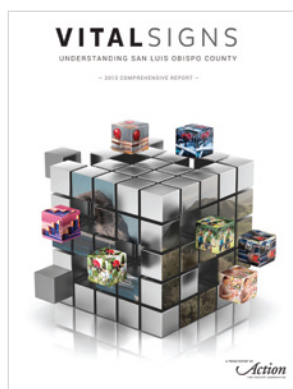
COMMUNITY NEEDS FUND

Healthy communities adapt and change over time. Demographic shifts, natural events, economic development and other factors all affect community development. When change occurs, so do community needs. Sources of funding that can adapt along with community needs are vital. The Community Needs Fund supports our General Grants program that distributes funds each year to a variety of nonprofit organizations throughout the county to address diverse community interests.

ACTION FOR HEALTHY COMMUNITIES – VITAL SIGNS

ACTION is a consortium of public, private, and nonprofit organizations that collaborate on a regular basis to assess the quality of life in the county. The 2013 trend report produced by ACTION, “VITAL SIGNS”, concluded that top community concern facing the county is a rapidly expanding population. Water, employment/jobs, housing costs/cost of living, and schools/overcrowding at schools were other important issues.

What is the quality of life like in San Luis Obispo County? Do residents feel safe? Are there enough employment opportunities? Do people feel they have access to good schools and services? Is our community healthy? These questions and many more are addressed in the report. See the full report on our website, www.cfsloco.org, under the Grants tab.



WOMEN'S LEGACY FUND

The Women's Legacy Fund supports programs and organizations that help local women and girls move out of poverty, establish safe relationships, choose healthy behaviors, build communication skills, master non-traditional occupations, and strengthen their physical, emotional, intellectual and financial well-being. Since the fund was established in 2003, its endowment fund has grown to more than \$800,000. An annual luncheon acknowledges donors, announces annual grantees, and celebrates the collective philanthropy of women in our community and beyond. A total of \$22,500 in grants was awarded in 2013.

See more about the Women's Legacy Fund on our website, www.wlfslo.org.





GROWING TOGETHER FUND

The Growing Together Fund was established in 2001 as an initiative to address the needs of Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, and Intersex residents of San Luis Obispo County. This fund was established through grants from the National Lesbian and Gay Funding Partnership, and has distributed more than \$100,000 in grants to local organizations and established an endowment of more than \$280,000.

The Growing Together Fund participates in many annual events throughout the year including Pride in the Plaza, and hosts film screenings to help educate and celebrate diversity and acceptance in our community. See more on our website, www.cfsloco.org.



ART INSPIRES FUND

The Art Inspires Endowment Fund was established in 2002 by a grant from the Hearst Foundation to create an arts endowment for the county to support, strengthen and stabilize the arts. In 2013, a total of \$16,450 was awarded to six nonprofit organizations to support their outreach to the community about their important work that supports the arts. For a complete list of grantees, visit our website, www.cfsloco.org.



GENERAL GRANTS PROGRAM

Our General Grants Program is funded solely by local donors who have contributed to The Foundation's Community Needs Endowment and various Field of Interest funds. Grants support programs that provide significant benefits to the community within and across five funding areas including arts and culture, education, health, human services, and community enhancement. Our goal is to distribute funds to a variety of nonprofit organizations who provide much-needed services in the county.

For more information about our grants and initiatives, visit our website www.cfsloco.org.

We are proud to work together with our donors and friends to improve and enrich the lives of the people in San Luis Obispo County!

SCHOLARSHIPS

In 2013, we awarded 47 scholarships valued at \$72,516 to support deserving students from across San Luis Obispo County.

JOHN AND YVONNE HSU EDMISTEN SCHOLARSHIP IN MEMORY OF ALLAN VOIGT M.D.



The John and Yvonne Hsu Edmisten Scholarship in memory of Allan Voigt M.D. was established in 2012 to honor Dr. Voigt, a physician who retired to San Luis Obispo after a distinguished career in medicine, and who was also an avid supporter of the performing arts. Qualified students for this scholarship plan to major in science, technology, engineering or mathematics at a four-year college or university.

Oksana Moscoso, the scholarship's 2013 recipient, will begin her undergraduate career as a freshman at Harvard this coming fall.

Moscoso has also been a dancer for 15 years. She trained at the Academy of Dance, and participated in the Civic Ballet of San Luis Obispo and the San Luis Jazz Performing Group. Next year she plans to join the Harvard Ballet Company and the Harvard Modern Company. "To me, science and dance will always walk hand in hand, providing a balance between my academic and artistic sides."

DAVID B. GIANAS MEMORIAL SCHOLARSHIP

The David B. Gianas Scholarship was established in memory of teacher and mentor David B. Gianas. This educational scholarship benefits students with special needs from Atascadero or Del Rio Continuation high schools who face challenges in achieving their educational goals. Qualified students must have an educational plan that includes full-time enrollment at an approved two-year community college, vocational or trade school or four-year university. In 2013, a total of \$8,500 was distributed to eight students to support their educational goals.

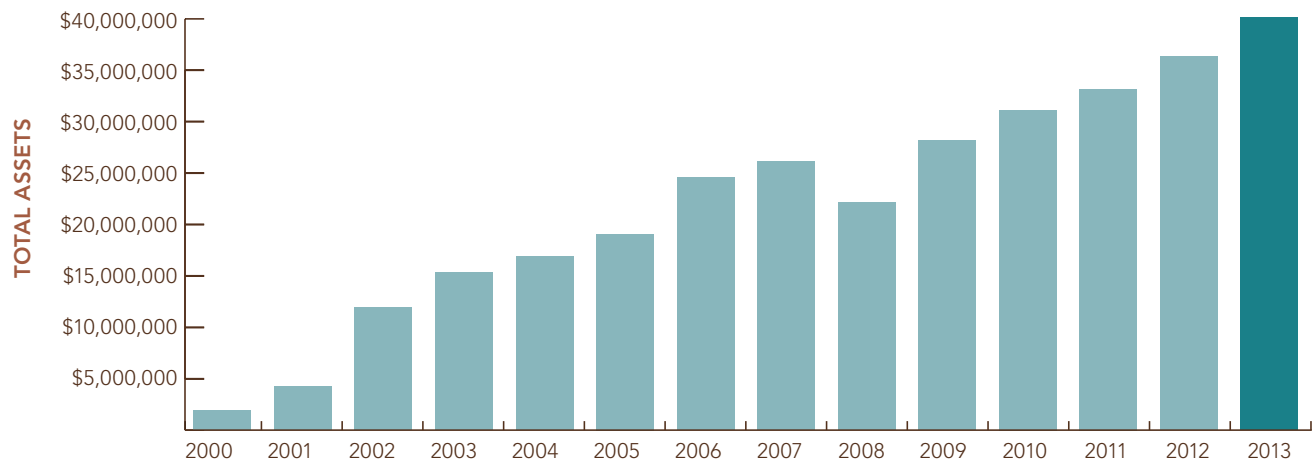
For a complete listing of our [scholarships](#) and [recipients](#), visit the Grants tab on our website, www.cfsloco.org.

"To me, science and dance will always walk hand in hand, providing a balance between my academic and artistic sides."

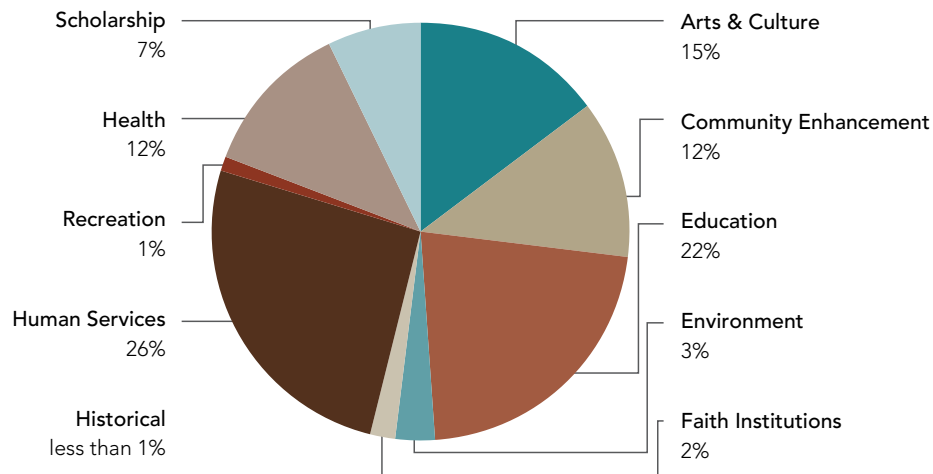
– Oksana Moscoso

FINANCIALS

Celebrating 15 years... The Community Foundation Growth



2013 GRANTS BY PROGRAM



ASSETS

Cash & Cash Equivalents	2013
Investments	\$4,104,306
Contributions Receivable & Prepaids	\$33,507,937
Real Estate Held for Sale	\$4,213
Note Receivable	\$0
Future Interests & Other Assets	\$347,099
Furniture & Equipment (less depreciation)	\$999,011
	<u>\$1,790,787</u>
TOTAL	\$40,753,353

CURRENT LIABILITIES

Accounts Payable & Deferred Revenue	2013
Note Payable	\$187,092
Split Interest Agreements	\$0
Organization Funds	\$368,794
Net Assets	\$3,819,441
	<u>\$36,378,026</u>
TOTAL	\$40,753,353

2013 audit conducted by Caliber Audit & Attest, LLP.
Audited statements and form 990 available on website.



The Community Foundation's 2013 grant distributions totaled 405, valued at more than \$1.4 million.

FOUNDERS

The donors listed below are our Founders. They supported us during the beginning stages of our organization. We are forever grateful for their generosity, and for creating an organization that withstands the test of time.

M. Richard & Joyce J. Andrews
Foundation in honor of
Carrol R. Pruett
Lyn & Jim Baker
Barbara Bell
Butz Construction, Inc.
Vicki & Howard Carroll
Paula & Chris Daman
Alison & John Denlinger
John DeVincenzo
Ernst & Mattison
Linda & Terry Fibich

Morgan Flagg Family Foundation
in memory of Lou & Lori Flagg
Vel & Abe Flory
Joan & Lawrence Foelker
Ann C. Freeman
Diane & Al Fritz
Patricia Gomez & Frank Seiple
Walter Clay Hill
Clifford B. Holser
Perry & James Jamieson
Letha & Glenn Josephson

Dee Lacey
Carol J. Hanna, M.D. &
Pamela J. Lee, Ph.D.
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Diane & Nick Pokrajac

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Carol & Jerry Santens
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Carol & Warren Sinsheimer
Norma & Jim Sinton
Jane & Steve Sinton
Johnine & Brian Talley
Rosemary & Don Talley
Susan & Ke-Ping Tsao
Cindy & Karl Wittstrom

For a list of all 2013 donors, please visit our website, www.cfsloco.org.

Thanks to the following for making this annual report possible:
Achievement House/Mailing & More • Central Coast Printing • Verdin
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