

THE *Community* FOUNDATION

SAN LUIS OBISPO COUNTY



COMMUNITY PARTNERS

2015 ANNUAL REPORT



MISSION & VISION

“Our mission is to provide leadership and encourage charitable giving for the issues that improve and enhance lives in San Luis Obispo County.”

BOARD OFFICERS

Steve McCarty, President, *San Luis Obispo*
Mary Verdin, Vice President, *Arroyo Grande*
Bill Raver, CFO/Treasurer, *Morro Bay*
Jim Glinn, Secretary, *Cayucos*

BOARD OF DIRECTORS

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Claire Clark, <i>Arroyo Grande</i>	Mike Patrick, <i>San Luis Obispo</i>
Lee Hollister, <i>San Luis Obispo</i>	Ann Robinson, <i>San Luis Obispo</i>
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Mike Miner, <i>Grover Beach</i>	Johnine Talley, <i>Arroyo Grande</i>
Joan Parker, <i>San Luis Obispo</i>	

PAST BOARD PRESIDENTS

Jane Sinton, 1998–2001	John Dunn, 2007–2009
Dean Miller, 2001–2003	Wendy Brown, 2009–2011
Julian Crocker, 2003–2005	Dee Lacey, 2011–2013
Lyn Baker, 2005–2007	Ann Robinson, 2013–2015

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Heidi H. McPherson, *Chief Executive Officer*
Karen Bolen, *Finance Assistant*
Angela Hollander, *Scholarship Program Associate*
Donna Jones, *Director of Finance and Administration*
Cecelia Mazelin, *Office Manager*
John Neylan, *Donor Services and Grants Associate*
Janice Fong Wolf, *Director of Grants and Programs*



2015 Board of Directors

FOUNDERS

M. Richard & Joyce J. Andrews Foundation <i>in honor of Carrol R. Pruett</i>	Dee Lacey
Lyn & Jim Baker	Carol J. Hanna, M.D. & Pamela J. Lee, Ph.D.
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Walter Clay Hill	Jane & Steve Sinton
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Perry & James Jamieson	Rosemary & Don Talley
Letha & Glenn Josephson	Susan & Ke-Ping Tsao
	Cindy & Karl Wittstrom

ENGAGING COMMUNITY PARTNERS

DEAR FRIENDS,

We are pleased to share with you the 2015 Annual Report for your Community Foundation. It was a year of significant growth and opportunity for The Community Foundation and for all our partners across the county.

This was the first year of our new Strategic Plan. As part of this new plan, we are celebrating our work with partners, donors and nonprofits throughout San Luis Obispo County. By building and engaging partnerships, together we are able to help build a thriving community.

This was also the year we began our new “In Our Backyard” series to engage our donors in conversations focused on the issues impacting our community. Topics in this series are as diverse as your interests, from conversations about the challenges young people face to the needs of women and girls. We are pleased to continue to present this valuable series to our donors and we look forward to expanding our philanthropic services.

Finally, we are excited to announce that The Community Foundation’s assets under management have grown to more than \$52 million dollars. This is a significant milestone for us as we are building our capacity to better enhance the quality of life for all residents of San Luis Obispo County.

Thank you for being a part of our Community Foundation family! We look forward to partnering with you in the years to come.



Steve McCarty
President



Heidi H. McPherson
Chief Executive Officer

DONOR SERVICES

Support & gift vehicles that help donors make thoughtful & strategic decisions about philanthropic goals.

Endowment-building programs & services for nonprofits to support long-term sustainability.

GRANTMAKING & SCHOLARSHIPS

Grants to organizations working to strengthen our county. Scholarships & education to help high school students achieve their educational goals.

INITIATIVES & PROGRAMS

Special programs that impact our grantmaking focus areas, often in collaboration with other organizations.





PARTNERS IN PHILANTHROPY



Members of Central Coast Grown, the Food Bank Coalition and Glean SLO share their work at an "In Our Backyard" session.

Since 1998, The Community Foundation San Luis Obispo County has helped hundreds of individuals, families and businesses achieve their philanthropic goals. Our Donor Services offer simple, powerful and highly personal approaches to giving that enhance our community. Serving as a catalyst, we connect donors with the needs in our community.

Donor Advised Funds constitute irrevocable gifts invested over time and used as a permanent source of community support.

A new program introduced in 2015 was "In Our Backyard," a series of donor education programs to better engage donors and fund holders with the issues that matter to our county. The series is designed to highlight the close proximity of these community challenges and topics have ranged from food insecurity and hunger, to the needs of youth and women in our community.

At each event, a Community Foundation nonprofit grantee shares directly with our donors the successes and challenges facing their mission. The purpose of the "In Our Backyard" series is to be a forum for dialogue and discussion among our donors in order to help make philanthropy at The Community Foundation more strategic.

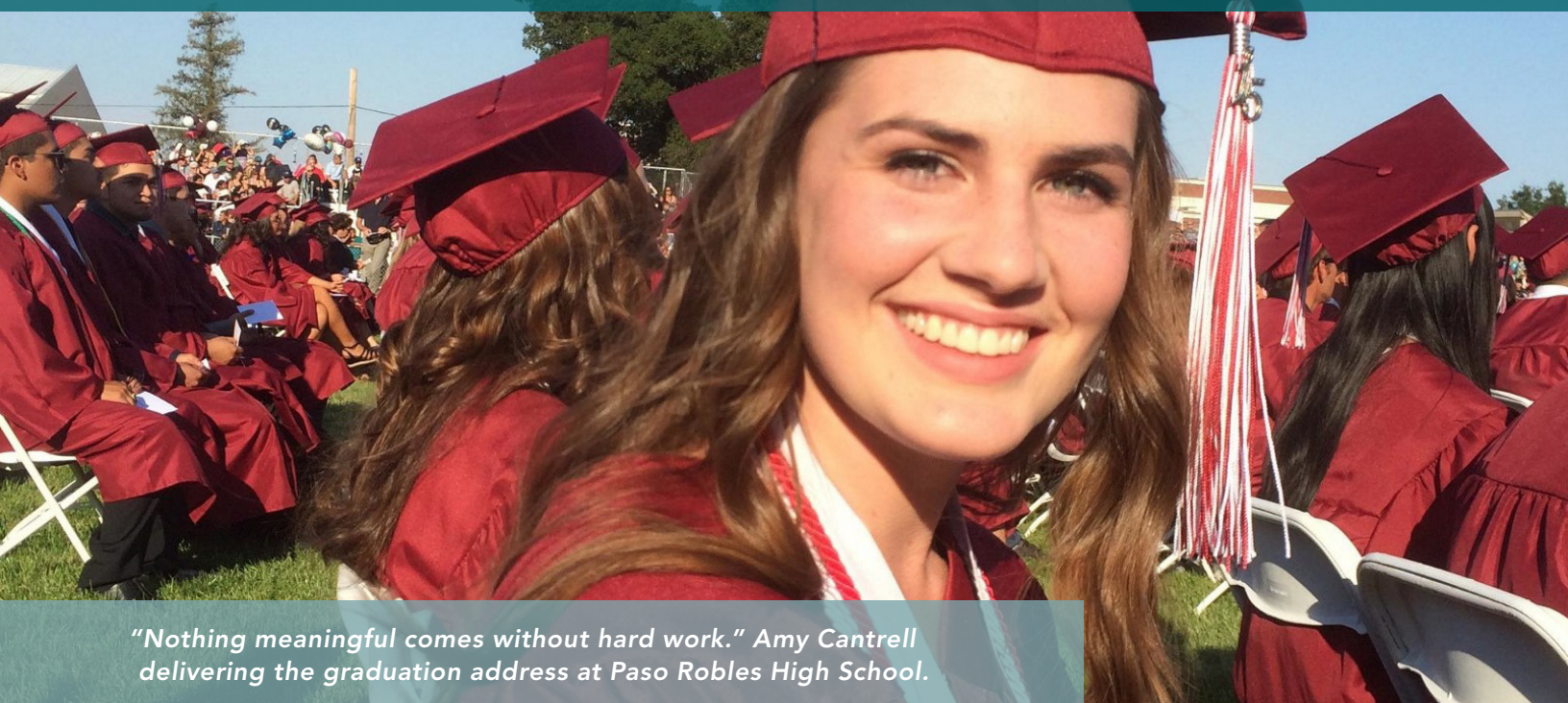
"It is imperative that I educate myself to make donor decisions in line with my personal goals."

—Sally Knight, Community Foundation Donor referring to the "In Our Backyard" education opportunities.

For more information about the "In Our Backyard" donor education sessions or how to establish your own Donor Advised Fund, please contact John Neylan, Donor Services and Grants Associate, at (805) 543-2323.



PARTNERING FOR GREATER GOOD



"Nothing meaningful comes without hard work." Amy Cantrell delivering the graduation address at Paso Robles High School.

In 2015, The Community Foundation, together with our fund holders, awarded 402 grants and scholarships totaling \$2.4 million to benefit San Luis Obispo County. 94% of grants remained in San Luis Obispo County.

Richard J. Weyhrich's driving passion was to empower and encourage individuals with leadership potential. The **Richard J. Weyhrich Leadership Award** was established in his memory and continues to provide financial support to young scholars who demonstrate strong leadership skills, as well as a dedication to serve the San Luis Obispo County community. It is awarded to one student in every high school throughout the county each year.

The Richard J. Weyhrich Leadership Award celebrated its 10th anniversary in 2015. The endowment fund has provided 159 individual grants totaling \$350,000 in scholarship awards over the past decade.

Amy Cantrell was a recipient of the 2015 Richard J. Weyhrich Leadership Award. When Amy delivered the graduation address at Paso Robles High School she was ASB President, editor for the *Crimson Chronicles*, and Rotary Youth leader. See page 7 or visit www.cfsloco.org

for more information about our grantmaking in San Luis Obispo County.

Learn more about our scholarship programs and how you can support our scholarships by visiting www.cfsloco.org or contact Angela Hollander, Scholarship Program Associate, at (805) 543-2323.



2015 Weyhrich scholarship recipients



COMMUNITY PARTNERSHIPS



2015 Women's Legacy Fund Luncheon

The Community Foundation San Luis Obispo County's Initiatives & Special Programs bring organizations and individuals together to make a greater impact on the needs of our community.

WOMEN'S LEGACY FUND

Established in 2003, The Women's Legacy Fund is the only endowment in San Luis Obispo County that singularly aims to be a catalyst for philanthropy that improves the lives of women and girls. This year, the Women's Legacy Fund reached \$1 million in assets and released *What Do Women Need?*, a new report that highlights significant issues affecting women and girls in the San Luis Obispo community. Based on this data, the Fund is focusing its future efforts on supporting programs that empower girls with the skills, knowledge and support to overcome gender inequities, media images and stereotypes that build their resilience.

KLAPROAD HOMELESS INITIATIVE

Established in 2009, through a generous bequest from Hugo and Erna Klaproad, the Klaproad Homeless Initiative helps very low-income South County families to move out of recent homelessness and stabilizes them in permanent housing. Through support services and a South County agency grant of more than \$1.3 million from The Community Foundation, the homeless safety net in South County has been made stronger and more stable as families have been moved off the street and into homes.

RAISING A READER

Early childhood literacy is critical for future success. This fund provides grants to local organizations to implement Raising A Reader, an award-winning pre-reading program that promotes family literacy via a rotating book bag program. Raising A Reader classroom sites currently serve 11 communities, in 21 sites throughout Oceano, Grover Beach, Paso Robles, Shandon, Los Osos, Cambria, San Miguel, Atascadero, Nipomo, Baywood and San Luis Obispo. More than 500 children and their families participated in the program in 2015.

Please visit www.cfsloco.org to learn more about these and other initiatives.



Hope for families begins in the home.



Children who learn to read build skills for future success.

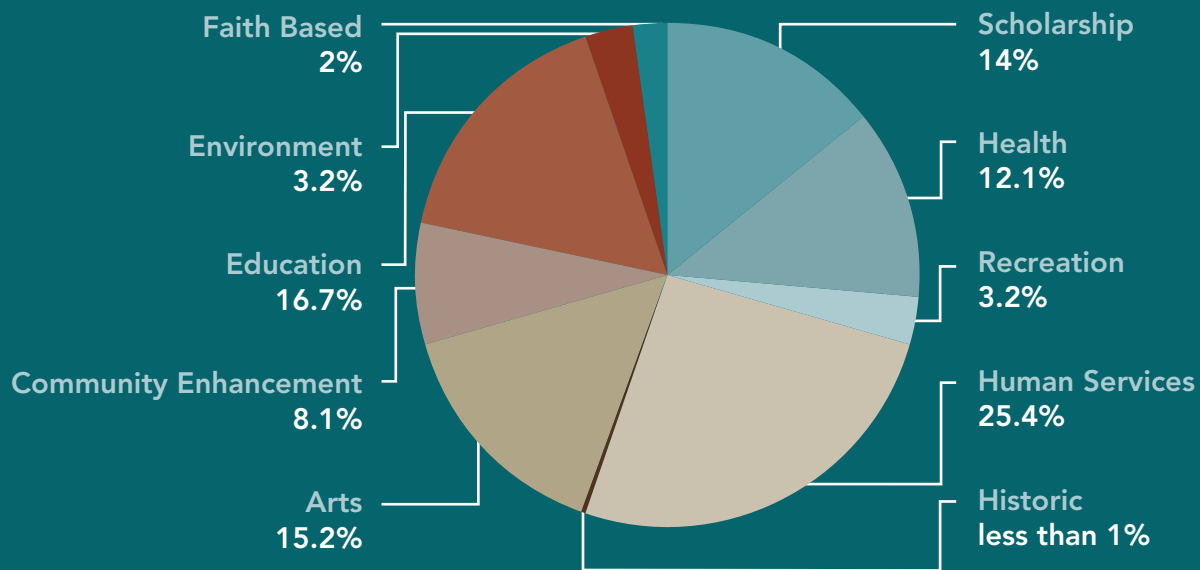
FINANCIAL HIGHLIGHTS

**TOTAL
ASSETS**
as of 12/31/15
\$52 million

**TOTAL
GRANT
DOLLARS**
since inception
\$28 million

**TOTAL
NUMBER OF
GRANTS**
in 2015
402

2015 GRANTS BY PROGRAM



ASSETS

2015

Cash & Cash Equivalents	\$5,374,220
Investments	\$41,018,632
Prepaid Expenses & Other Assets	\$7,456
Real Estate Held for Sale	\$2,903,687
Notes Receivable	\$339,639
Future Interests Under Split Interest Agreements	\$1,321,737
Property & Equipment (net of accumulated depreciation)	\$1,692,913

TOTAL

\$52,658,284

LIABILITIES AND NET ASSETS

2015

Accounts Payable, Grants Payable & Accrued Liabilities	\$486,560
Liabilities Under Split Interest Agreements	\$519,730
Funds Held for Others	\$3,816,070
Net Assets	\$47,835,924

TOTAL

\$52,658,284

2015 audit conducted by Caliber Audit & Attest, LLP.
Audited statements and form 990 available on website.



In 2015, The Community Foundation served all of SLO County with over 400 grants, totaling more than \$2.4 million.




Thanks to the following for making this annual report possible: Verdin and Bert Forbes

Special thanks to: The Community Foundation donors, volunteers, nonprofit grantee partners and our many committee and Board members who help to make this county vibrant.

THE *Community*
FOUNDATION
SAN LUIS OBISPO COUNTY

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