

Si ta

2017 ANNUAL REPORT

# MISSION &

The Community Foundation makes a difference through **PHILANTHROPIC LEADERSHIP.** We envision San Luis Obispo County to be an **enduring**, thriving **C engaged community**.

### **2017 Board of Directors**

Jim Brabeck, *Los Osos* Jeff Buckingham, *San Luis Obispo* Sandy Dunn, *Avila Beach* Grenda Ernst, *Atascadero* Gwen Erskine, *Templeton* Jim Glinn, *Cayucos* Ben McAdams, *San Luis Obispo* Steve McCarty, *San Luis Obispo* Joan Parker, *San Luis Obispo* Mike Patrick, *San Luis Obispo* Tom Sherman, *San Luis Obispo* Linda Somers Smith, *Avila Beach* Johnine Talley, *Arroyo Grande* Bill Thoma, *Avila Beach* Mary Verdin, *Arroyo Grande* 

### **Board Officers**

Mary Verdin, *President* Jim Glinn, *Vice-President* Tom Sherman, *Treasurer* Grenda Ernst, *Secretary* 



Ben McAdams, Linda Somers Smith, Joan Parker, Steve McCarty, Johnine Talley, Gwen Erskine, Tom Sherman, Mike Patrick, Mary Verdin, Jim Brabeck, Jeff Buckingham, Bill Thoma, Sandy Dunn, Grenda Ernst (*not pictured*)

### **Past Board Presidents**

Jane Sinton, *1998-2000* Dean Miller, *2001-2002* Julian Crocker, *2003-2004* Lyn Baker, *2005-2006* John Dunn, *2007-2008* Wendy Brown, *2009-2010* Dee Lacey, *2011-2012* Ann Robinson, *2013-2014* Steve McCarty, *2015-2016* 

# **DEAR** FRIENDS,

We are pleased to share many exciting updates from your Community Foundation in our 2017 Annual Report.

Thanks to the commitment of so many, we were able to distribute a record \$5 million in grants and scholarships to support a variety of important work in San Luis Obispo County. Forward-thinking donors and community partners, such as yourself, have made this impact possible.

When devastating fires and floods unexpectedly struck our neighbors in Napa and Sonoma, then Santa Barbara and Ventura, we activated our Disaster Support Fund to distribute more than \$15,000 in grants supporting our fellow Californians. In addition, through a private family foundation a significant grant of \$100,000 implemented a nationally recognized mental health first aid program serving our high school youth facing unprecedented challenges. We also launched an exciting new grants program designed for small nonprofit organizations called BUILD. Finally, we provided funding to launch a new scholarship and mentorship program supporting disadvantaged foster youth across our county, so they may achieve their dreams. We believe in the power of philanthropy to help build a stronger and more vibrant region.

During 2017, charitable assets under management grew to nearly \$60 million and provided grant and scholarship funding to almost 300 different funds at the Foundation, leaving an indelible impact across our region. These numbers represent the tremendous spirit of giving in San Luis Obispo County and the belief in The Community Foundation as a trusted partner. Our charitable assets represent the impact we make together on the people and the place we call home.

From here, we look forward to the future as we celebrate 20 years of impact in 2018. On behalf of the Board of Directors and staff, thank you for being a part of our Community Foundation family!



Mary Verdin *President* .

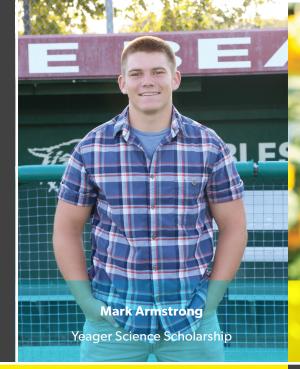
Heidi H. McPherson Chief Executive Officer

, 11M

#### Total Awarded in Scholarships:

\$234.250

The Foundation presented more than **\$234,000** in scholarships to **58** students from all over San Luis Obispo County.



# **SCHOLARSHIPS**

The Community Foundation assists individuals, families and businesses with a simple yet powerful way to provide scholarships to help people achieve their dream of higher education. Scholarships have a significant impact on the student recipients by helping them seize an educational opportunity that can set them on a path to independence and success. They provide life-long opportunities for students and a better-educated workforce for the community.

Maureen "Mo" Clancy Memorial Scholarship

**Juliana Ruef** 

#### Memorial scholarships honor the legacy of the donor and their values or their profession.

For instance, Maureen "Mo" Clancy lived to help others and will forever be remembered as a *strong-willed, loving and passionate* person. This memorial scholarship provides support to San Luis Obispo County girls who participated during high school in cross country and/or track and field and who will pursue a post-secondary education.



Kaley Allchin John and Yvonne Hsu Edmisten Scholarship in Memory of Allan Voigt, M.D. Scholarships were awarded to students in *every* school district across San luis Obispo County.

#### Sera Day Coryell Nursing Education Scholarship

Jima and Marcia Coryell with recipients Jocelyne Gonzales Perez, Emily Riforgiate, Graceanne Garza, and Payal Patel





**Dylan Prins** Douglas DeGross Scholarship for Automotive Studies



**Richard J. Weyhrich Leadership Award** 

Luke Wilenius Marion C. and Mark W. Wilson Nursing Scholarship

Photo: Cricket Handler, Heidi McPherson and Sally Knight enjoy the Dono Education event for the Children's Farmers Market program.

- AL

# DONORS

Donors have an important role as partners in our philanthropic impact. Local charitable giving enhances our community's life and values. We offer simple, powerful and highly personal approaches to giving. Our Donor-Advised Funds support a whole host of important nonprofit programs for our community, including those serving youth, the environment, the arts, historic preservation, education, social justice, disaster relief, health and human services, and many others.



Cri Han

San Luis O





92 Donor-Advised Funds
341 Total Grants Awarded in 2017
\$4,097,118 Total Awarded

"When we wanted to give back to the community, The Community Foundation provided the *long-term structure* to make a **specific impact on housing needs** in SLO county."

- Mary Trudeau, Vice President of The Mortgage House



"...substantial funds will be administered by the Foundation for **years to come** benefiting the youth of our county **who want to participate in sports and the arts.**"

Bob Wacker, Chairman, CIO, and Partner of Wacker
 Wealth Partners

# GRANTS

The vibrant and diverse community of nonprofit organizations in San Luis Obispo County provide support and services that enrich and improve the quality of life for all calling this beautiful county home. The Community Foundation supports and partners with many nonprofit organizations through our numerous grant programs addressing various community needs.

### \$5,479,466 Awarded in Grants in 2017

**Arts** . \$445.039 28%

5%

2%

Community Enhancement \$679,493

**Education** \$2,576,176

Health & Human Service \$1,512,088

Scholarships & Awards \$266,670

> Total Awarded \$5,479,466



Access Support Network San luis Obispo & Monterey Counties Adventures in Missions Affordable Housing Paso Robles African Wildlife Foundation Alexander Valley School Alley Cat Allies Alliance for Pharmaceutical Access, Inc. American Association of University Women American Cancer Society American Heart Association American Lung Association of California American Red Cross Amnesty International USA Animal Rescue Team Arroyo Grande Community Hospital Foundation Arroyo Grande High School ARTS Obispo Assistance League of San Luis Obispo County Association of Fundraising Professionals - SLO County Chapter Atascadero Education Foundation Atascadero High School Atascadero Lodge #2067 Loyal Order of Moose Basin Street Regulars-Central Coast Hot Jazz Society Best Friends Animal Society Big Brothers Big Sisters of San Luis Obispo County Bike SLO County Boys & Girls Club of North SLO County Boys & Girls Club of South SLO County Breast Cancer Action Cal Poly Arts Cal Poly Corporation Cal Poly Foundation The California Academy Foundation California Rangeland Trust Camp Ocean Pines The Cantinas Foundation Canzona Women's Ensemble CAP Health

Services Casa Solana, Inc. CASA/Court Appointed Special Advocates of SLO County Catholic Charities USA Cayucos Land Conservancy Central Coast Ag Network dba Central Coast Grown Central Coast Autism Spectrum Center Central Coast Children's Choir Central Coast Dragon Boat Association Central Coast Music Academy Central Coast Polo Club Central Coast State Park Association Child Development Resource Center Civic

School Mission San Luis Obispo de Tolosa Pro Cathedral Monterey Ridge Educational Foundation Morro Bay High School Morro Bay High School Boosters Club Morro Coast Audubon Society Music & Memory Napa Valley Community Foundation National Wildlife Federation NCI Affiliates, Inc. North County Adaptive Sports and Recreation Program One Cool Earth Opera San Luis Obispo Orchestra Novo Oxfam-America, Inc. Pacific Wildlife Care Partners in Equestrian Therapy Partners in Health Paso Robles Youth Arts Foundation PathPoint Peoples' Self-Help Housing Physicians for Social Responsibility Inc. Place of Hope, Inc. Planned Parenthood California Central Coast Positive Coaching

### "We consider The Community Foundation a lifetime partner in serving our friends, neighbors and families affected by School Army Salv County Serving County Serving Serv

#### - Jill Bolster-White, Executive Director,

#### Transitions-Mental Health Association

an Luis Obispo Clark Center Association Clark Center — Coalition to Protect San Luis Obispo County Coastal Resource Conservation District Columbia Counseling stries Community Action Partnership of San Luis Obispo County Community Counseling Center Community Foundation of Estero Bay The Community Foundation of Mendocino County Community Foundation Sonoma County Compassion & Choices Conservation Strategy Fund Cuesta College Foundation Doctors Without Borders Easy Lift

#### tance League of dero Education Street Regulars-**2017 Geographical** Distribution tral Coast tral Coast o Central

## 92% of funds stay in SLO County

Transportation Ecologistics El Camino Homeless Organization Environmental Center of SLO Esalen Institute Family Care Network, Inc. Feline Network of Central Coast Festival Mozaic First Baptist Church San Luis Obispo First Presbyterian Church of San Luis Obispo First United Methodist Church Five Cities Homelmess Coalition Food Bank Coalition of San Luis Obispo County Fort Hope, Inc. Foster Parent Association Foundation for the Performing Arts Center French Hospital Medical Center Foundation and Public Affairs Fresh S.T.A.R.T. Friends For Life Friends of 40Prado Friends of Fiscalini Ranch Preserve Friends of the Arroyo Grande Library Friends of the Charles Paddock Zoo, Inc. Friends of the San Luis Obispo Botanical Gardens The Friendship Center Gay And Lesbian Alliance of the Central Coast Global Fund for Women Global Glimpse Grantmakers Concerned with Immigrants and Refugees Grizzly Youth Academy Grover Beach Community Library Guide Dogs for the Blind, Inc. Habitat for Humanity, SLO County The Historical Society of Morro Bay HomeShare SLO Hope and Healing Academy Hospice of San Luis Obispo County Hospice Partners of

> Alliance Pregnancy and Parenting Support of San Luis Obispo County Restorative Partners,

Inc. RISE Ryan J. Clarke CPR Fund for Schools The Salvation Army Salvation Army South

Luis Coastal School District San Luis Obispo County Womenade San Luis Obispo Friends of the Luis Obispo High School San Luis Foundation San Luis Obispo Mothers an coast in location root bank in obston society for the on of Cruelty to Animals. Humane Society of the United States. Idaho Conservation League. Indiana University Foundation. Infinite Music Foundation. International Rescue Committee. Jack's Helping Hand. Jewish Community Center - Federation of San Luis Obispo. Jodi House, Inc. Kansas University Endowment Association. Kappa Kappa Gamma Foundation. KCBX Radio. Land Conservancy of San Luis Obispo County. Leadership SLO Foundation, Inc. The UNK Family Resource Center. Los Padres Forest Association Inc. Los Padres ForestWatch. Lucia Mar Unified School District. Meade Canine Rescue. Meals That Connect. Mission College Preparatory

Library San Obispo Legal Assistance for Peace San Luis Obispo Repertory uis Obispo Vocal Arts Ensemble Santa

Maria Valley Senior Citizen's Club Second Chance at Love Humane Society Skillful Meditation Project SLO Botanical Garden SLO Children's Museum SLO County Animal Services SLO County Office of Education SLO County YMCA SLO International Film Festival SLO Jazz Festival SLO Museum of Art (SLOMA) SLO Noor Foundation SLO Village SLO Youth Baseball League Slow Money San Luis Obispo SonShine Folk School Farm, Inc. South County Education Foundation South County Youth Coalition Spokes, Inc. St. Jerome's Episcopal Church St. Luke United Methodist Church Stand Strong Stanford University Stronger Futures Foundation Studios on the Park Sweet Briar College Theta Xi Foundation Tolosa Children's Dental Center Transitional Food and Shelter, Inc. Transitions-Mental Health Association Trinity Presbyterian Church United Nations Foundation United Way of San Luis Obispo County Veterans Excursions to Sea (V.E.T.S.) Washington University School of Law Water.org Wellness Kitchen and Resource Center White Heron Sangha Whitman College, Office of Annual Giving Wilshire Health & Community Services, Inc. Women's Shelter Program of San Luis Obispo County Woods Humane Society



# **SPECIAL** PROGRAMS

The Community Foundation provides many programs and services beyond providing grants and scholarships that improve accessibility to specific community needs and open doors to opportunities to make an impact across San Luis Obispo County.

#### **In Our Backyard**

In 2017, we offered five unique interactive education sessions for our donors as part of our popular In Our Backyard series. Programs included: **Every Girl Has A Voice A Time for Tolerance Our Dreamers Meet A Seastar In Our North County Backyard** 



### **The Women's Legacy Fund**

The mission of the Women's Legacy Fund, a \$1.4 milliondollar endowment, is to be **a catalyst for philanthropy** that improves the lives of women and girls in San Luis Obispo County. In 2017 they provided **\$45,000** in grants to local programs that **empower girls with the** *skills, knowledge, and support* to overcome gender inequities, stereotypes and build resilience.



#### The Growing Together Initiative Fund

The Growing Together Initiative (GTI) Fund distributes grants to local organizations that **address issues and service needs** of the county's lesbian, gay, bisexual and transgender community. GTI provides grants to local Genders & Sexualities Alliance (GSA) student-run clubs to **provide support for a safe and supportive** environment for LGBTQ youth.



Access for All's mission is to assist in creating an accessible community where people with disabilities have an **equal opportunity to fully participate** in all aspects of SLO County life. They recognize individuals and businesses that work to support a barrier-free SLO County by presenting the Paul Wolff Accessibility Advocacy Award.

#### **Professional Advisors Luncheon**

The Annual Professional Advisors Luncheon provides an educational and networking opportunity for local professional advisors to learn more about their role in **raising awareness of charitable giving** within our community.



# **COMMUNITY** IMPACT

The Community Foundation works with local organizations to address the challenges occurring across San Luis Obispo County. Although these needs cannot be met overnight, we are very proud for the opportunity to make huge strides in making a difference.

# 16,000

elementary and middle school students countywide **gained** *free* access to visual & performing arts

# 1,000+

high school students received **college readiness support** 

# 3,000+

individuals accessed various **health** preventative & intervention services

75

Households received support with **finding & maintaining** housing



### Disaster Support Fund

Through the Disaster Support Fund, the Foundation offers a way for the San Luis Obispo County community to **unite & share** in supporting the victims and heroes of devastation. In 2017 we supported our neighbors in **northern California** as well as in **Santa Barbara** and **Ventura** who experienced devastating fire and floods.

#### **Compassion for Animals**

Through support provided by a donor advised fund, the Foundation was able to donate \$40,000 to a local humane society for the purchase of a new transport van. This life-saving vehicle allows the nonprofit to assist other shelters with overcrowding and is an important part of the great work that the nonprofit does across our community.









#### The School Matinée Program

In 2017 the Foundation awarded \$10,000 to support the School Matinee Program at the Foundation for Performing Arts to cover the transportation costs of thousands of local school children to attend performances at a world class facility.



### **SMART Girls**

The Women's Legacy Fund provided a \$40,000 3-year grant to the Boys & Girls Club of North SLO County for their SMART Girls curriculum for middle-school girl participants. The program includes education on healthy lifestyles, relationship management, and sexual health and peer pressure bullying, which is in congruence with WLF priorities.

# **FINANCIAL** SUMMARY

As of December 31, 2017

### **Statement of Financial Position**

#### Assets

\$4,885,056
50,490,176
236,728
314,687
2,028,328
1,628,191

**Total Assets** 

\$59,583,166

#### **Liabilities & Net Assets**

Payables & Other Liabilities	\$343,862
Liabilties Under Split Interest Agreements & Charitable Remainder Trusts	744,281
Funds Held for Agencies	3,767,817
Total Liabilities	\$4,855,960
Net Assets, End of Year	\$54,727,206

#### Total Liabilities & Net Assets \$59,583,166

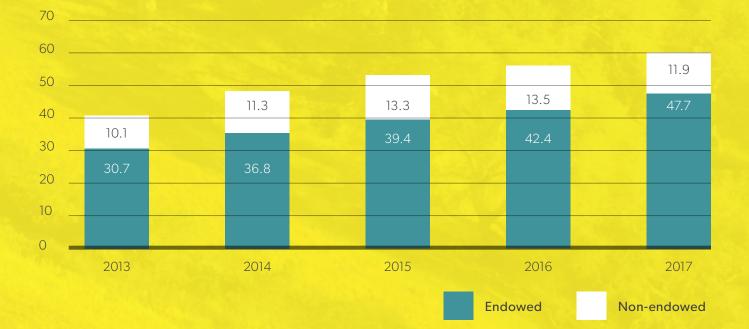
Financial information is based on audited financial statements prepared by Caliber Audit & Attest, LLP. Audited statements and Form 990 available on website.

### **Statement of Activity**

Net Assets, Beginning of Year	\$50,821,860	
Additions		
Contributions & Other Support	\$4,396,475	
Gain on Investments	6,180,017	
Total Additions	\$10,576,492	
Expenses		
Program		
Grants & Scholarships	\$5,215,170	
Program-Related Operating Expenses	885,755	
Total Program	6,100,925	
Administrative & General	386,859	
Development	183,362	
Total Expenses	\$6,671,146	Five Y
Change in Net Assets	\$3,905,346	<b>Grow</b> Charitab
Net Assets, End of Year	\$54,727,206	Manage



Charitable Assets Under Management (in Millions)



2017 Annual Report | 15



550 Dana Street, San Luis Obispo, CA 93401

www.facebook.com/

TheCommunityFoundation-SanLuisObispoCounty

**P** (805) 543-2323 **F** (805) 543-2346 info@cfsloco.org www.cfsloco.org



Printed on recycled paper

#### Staff

Heidi H. McPherson, Chief Executive Officer

Karen Bolen, Finance Associate

Angela Hollander, Senior Scholarship Program Associate

Donna Jones, Director of Finance and Administration

Cecelia Mazelin, Office Manager and Program Associate

Erin McCall, Communications and Program Associate

John Neylan, Donor Services and Grants Associate

Len Smolburd, Grants Manager

#### **Special Thanks**

The Community Foundation donors, volunteers, nonprofit grantee partners, and our many committee and Board members.

Thanks to ( iii ) DESIGN for making this annual report possible. www.iiidesign.com

#### **Photo Credits**

Rob DeGraff, Bert Forbes, Amy Lynn Blake, Jenny Ashley Photography, courtesy of Paso Robles Youth Arts Foundation, Boys & Girls Club San Luis Obispo County, Peoples' Self-Help Housing, Food Bank Coalition of San Luis Obispo, San Luis Obispo Symphony, Woods Humane Society



Confirmed in Compliance with National Standards for U.S. Community Foundations

#### Founders

M. Richard & Joyce J. Andrews Foundation in honor of Carrol Pruett Lyn & Jim Baker Barbara Bell John & Barbie Butz & Family Vicki & Howard Carroll Paula & Chris Daman Alison & John Denlinger John DeVincenzo Linda & Terence 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 Carol J. Hanna, M.D. & Pamela J. Lee, Ph.D. Walter Clay Hill Clifford B. Holser Perry & James Jamieson

Letha & Glenn Josephson **Dee Lacey** Linda & Wayne Lewis Lisa Kilburn Maino & James F. Maino Linda & Greg McMillan Lou & Dean Miller **Kimo Pankey** Barbara & John Partridge **Carolyn & Michael Pineau** Diane & Nick Pokrajac Joan & Carrol Pruett Laurie & Rob Rossi **Carol & Jerry Santens Betty Schetzer Carol & Warren Sinsheimer** Norma & Jim Sinton Jane & Steve Sinton Johnine & Brian Talley Rosemary & Dog Talley Susan & Ke-Ping Tsao Cindy & Karl Wittstrom