



550 Dana Street, San Luis Obispo, CA 93401

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Staff - 2019

Heidi H. McPherson,
Chief Executive Officer

Karen Bolen,
Finance Associate

Briana Fox,
Office Manager / Executive Assistant

Trish Hammond,
Director of Finance and Administration

Angela Hollander,
Senior Scholarship Program Associate

Erin McCall,
Communications and Program 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

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Rob DeGraff and The Land Conservancy,
Boys & Girls Club of North San Luis Obispo
County, Community Counseling Center,
Dana Adobe, Five Cities Youth Baseball,
North County Adaptive Sport & Recreation
Program, Paso Robles Housing Authority,
Peoples' Self Help Housing, 40 Prado,
Transitions-Mental Health Association



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

THE *Community* FOUNDATION SAN LUIS OBISPO COUNTY

20 YEARS *of* IMPACT

2018

COMMUNITY IMPACT REPORT

DEAR COMMUNITY FOUNDATION FAMILY,

As we take a moment to pause and look back at the accomplishments of 2018, we want to thank every member of The Community Foundation Family. We are proud of the comprehensive effort to create a positive impact throughout San Luis Obispo County.

In 2018, we honored our past by taking the time to reflect on the guidance and hard work of the leaders before us that set the stage for today. In October, we gathered at the historic Santa Margarita Ranch to celebrate 20 years of impact. This milestone year was marked with achievements that include total investments of more than \$34 million in grants and scholarships since the start of The Community Foundation. It truly has been a collaborative effort that creates local results with 92% of funds staying here in San Luis Obispo County.

Our 20th anniversary year inspires us to remain committed to making an impact throughout the region. As we look to the future, we are dedicated

to the goals of our new strategic plan by promoting community leadership for impactful change, engaging and serving our donors, and exemplifying organizational excellence.

We must take a moment to thank each one of you. It is through your support, dedication and perseverance that we are able to collaborate together to support the range of needs that lead to the quality of life on the Central Coast.



Mary Verdin
Board President

Heidi H. McPherson
Chief Executive Officer

Our CORE VALUES



COLLABORATION



EXCELLENCE



INCLUSION



INTEGRITY



STEWARDSHIP

MISSION & VISION

The Community Foundation makes a difference through *philanthropic leadership*. We envision San Luis Obispo County to be an **enduring, thriving & engaged community**.

2018 Board of Directors

Board Officers

Mary Verdin – President
Arroyo Grande

Tom Sherman – Treasurer
San Luis Obispo

Grenda Ernst – Secretary
Atascadero

Jim Brabeck, *Los Osos*
Jeff Buckingham, *Los Osos*
Sandy Dunn, *Avila Beach*
Gwen Erskine, *Templeton*
Ben McAdams, *San Luis Obispo*
Steve McCarty, *San Luis Obispo*
Joan Parker, *San Luis Obispo*
Mike Patrick, *San Luis Obispo*
Linda Somers Smith, *Arroyo Grande*
Johnine Talley, *Arroyo Grande*
Bill Thoma, *Avila Beach*



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

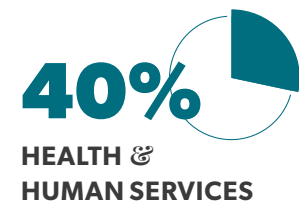
Past Board Presidents

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

COMMUNITY IMPACT

MORE THAN
\$36,000,000

AWARDED IN OUR
20 YEARS OF IMPACT



In 2018, The Community Foundation **CELEBRATED 20 YEARS** as a philanthropic leader serving San Luis Obispo County. While reflecting on the first 20 years of services, the same values that motivated the initial efforts to form the organization still inspire the work at The Community Foundation today. We are proud to work with our generous donors and nonprofit partners to touch individual lives and make a difference throughout the region.



6,504
Grants &
Scholarships
since 1998

SCHOLARSHIPS
\$2,388,150

ARTS
\$4,129,896

EDUCATION
\$9,440,196

**COMMUNITY
ENHANCEMENT**
\$6,063,103

HEALTH & HUMAN SERVICES
\$6,063,103

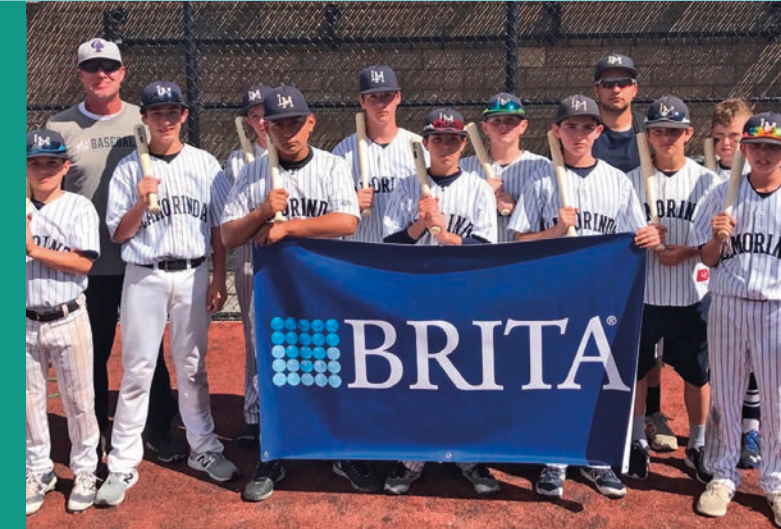


DISASTER SUPPORT FUND

The 2018 wildfire season was the deadliest and most destructive wildfire season on record in California, with a total of 8,527 fires burning an area of 1,893,913 acres. The Community Foundation activated the Disaster Support Fund to assist the communities affected and to offer an avenue for San Luis Obispo County residents to unite and share in supporting the victims and heroes of those fires. Donations in excess of **\$30,000** were received and The Community Foundation waived all administration fees to award grants for both immediate relief and to support rebuilding and recovery efforts.

FIVE CITIES YOUTH BASEBALL NATIONAL CHAMPIONS

Through The Robert H. Janssen Youth and Youth Sports Fund, The Community Foundation supports youth athletic programs and youth enrichment activities in the county. In 2018, **\$5,000** was awarded to the Five Cities Youth Baseball program to help build batting cages. Later in the year, the 13U Five Cities Babe Ruth All-Stars team made San Luis Obispo County history by winning the Babe Ruth World Series in Arkansas.



THE WOMEN'S SELF-EMPOWERMENT & NEIGHBORHOOD CHILD CARE PROJECT

The Community Foundation's Social Innovations Funding Collaborative granted **\$50,000** to a workforce development program in San Luis Obispo County. In partnership with the Literacy for Life-Literacy Council, CAPSLO Child Care Resource Connection, and Peoples' Self-Help Housing, the program provided residents of affordable housing developments and self-help homes with access to reading and financial literacy, entrepreneurship training, and in-home child care licensing.

CRITICAL MENTAL HEALTH COUNSELING

The Community Foundation awarded more than **\$350,000** to the Community Counseling Center for their new building and for mental health counseling for economically disadvantaged individuals. Mental health is a critical component to overall health and vitality but services are often costly. The Community Counseling Center provides affordable mental health services to all residents of San Luis Obispo County.



GRANTS

The needs of San Luis Obispo County are diverse, and we are fortunate to have many nonprofit agencies working to provide much needed services to our community. Through our grants program, The Community Foundation partners with these nonprofit agencies to **address community needs**.

\$3,207,426

Awarded in Grants in 2018



“When I think of what The Community Foundation has made possible by the grants that they’ve given us... **it opens doors for all these children and creates opportunities** that otherwise would not happen.”

Betian Webb
Director of Resident Services,
Paso Robles Housing Authority

Health & Human Services

\$1,533,482



Scholarships

\$265,350



Education

\$259,857



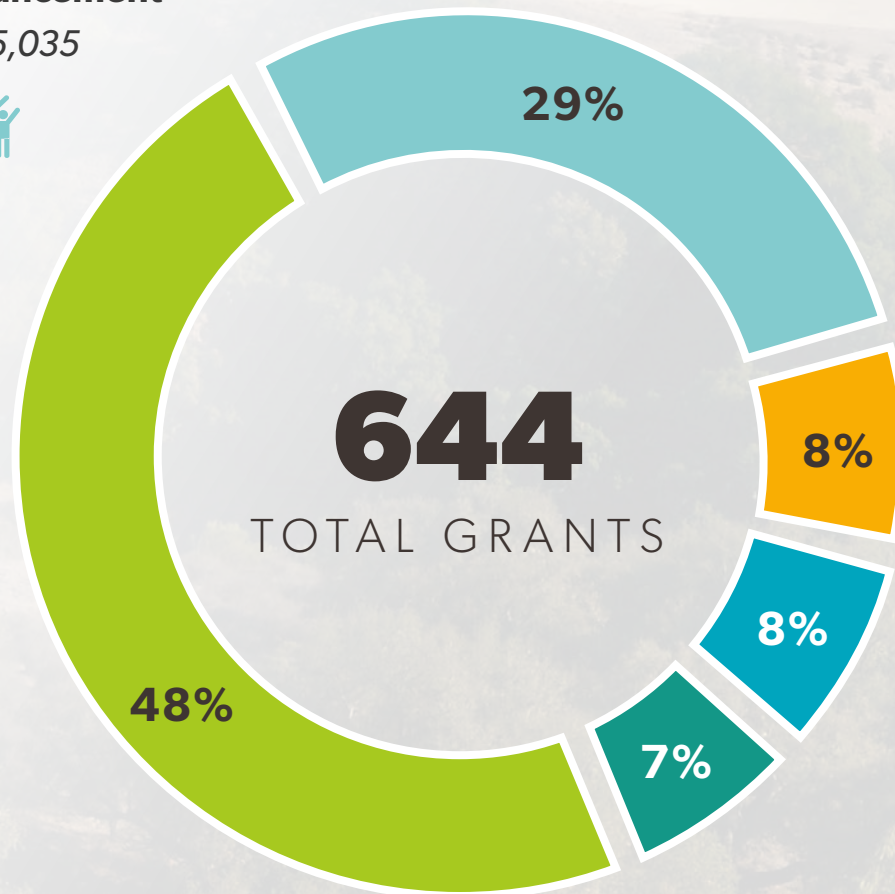
Arts

\$223,702



Community Enhancement

\$925,035



Transitions-Mental Health Association

Transitions-Mental Health Association (TMHA) is a community-based, private nonprofit human services agency. Since the first grant awarded to TMHA in 2001, The Community Foundation has provided more than **\$600,000** to their programs and services. Through our partnership with TMHA, the organization has developed and operated **residential, vocational, and day rehabilitation programs** for psychiatrically disabled adults, homeless adults, and at-risk youth.



40 Prado Homeless Services Center

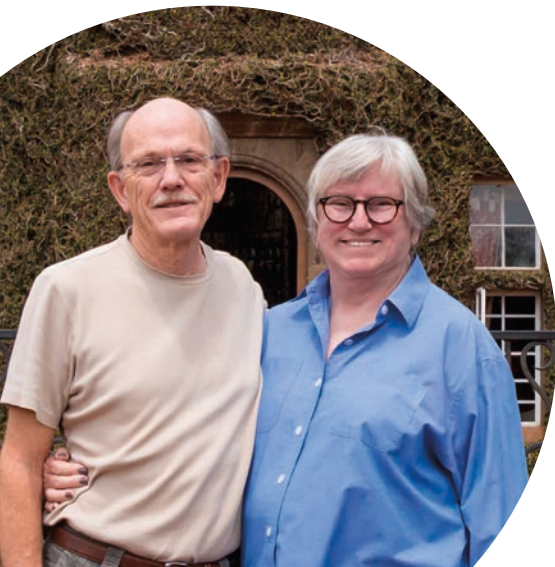
It can be a helpless feeling to be homeless, yet thousands find themselves in this predicament in San Luis Obispo County. The Community Foundation has been a part of the solution in providing more than **\$465,000** toward the construction and opening of the new **40 Prado Homeless Services Center**. The center is a **365 days-per-year** facility that helps individuals and families improve their health and stability and moves them toward self-sufficiency.



DONOR IMPACT

Donors are a vital part of The Community Foundation family. We work with individuals and the community at large as a conduit for the **values of philanthropy and improving the quality of life** on the Central Coast. With over 80 Donor-Advised Funds, our donors help support a variety of nonprofits throughout our community, from youth programs to environmental conservation, early literacy to arts programs.

Randy Knight is a retired physics professor and successful textbook author. His wife **Sally** has always been drawn to the arts and compassionate care for animals. The Knights wanted to give back to their community but did not know how to find local programs in need of support. They reached out The Community Foundation staff to learn about organizations and programs that met their specific philanthropic goals. As a result, they have developed strong relationships with several local nonprofit organization and have a better understanding of the needs of the region.



Boys & Girls Club of North SLO County has benefited from the Knights' generosity.

In 2018
more than
\$3,200,000

**Awarded
in Grants &
Scholarships**

86
DONOR-ADVISED
FUNDS

577
GRANTS IN 2018

67
SCHOLARSHIPS
IN 2018

“Our community has been really, really good to us and this is our way of being able to give back to it. To have the *goodness distributed over many causes* and many realms is beautiful.”

Candee and Bert Forbes

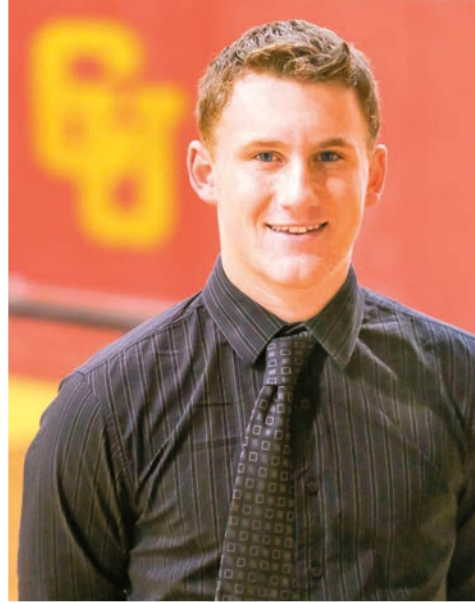


Collaborative Funding

The Community Foundation's Collaborative Funding Initiative (co-funding) connects our individual donors with our grants program to increase the stewardship of our donors and provide greater funding opportunities for local nonprofits. Since 2016, The Community Foundation has awarded **\$300,000** through co-funding relationships.

As longtime members of The Community Foundation family, Jim and Jeanette Efird were looking to expand the impact of their donor-advised fund. With the help of the Efird's funding, The Community Foundation awarded **\$6,000** for the Northern Chumash Education Program. Working in partnership with the historic Dana Adobe in Nipomo, the local yak tit'u tit'u yak tilhini Northern Chumash tribe developed a program designed to **celebrate and educate our community about their history, culture, and relationship with the environment.**



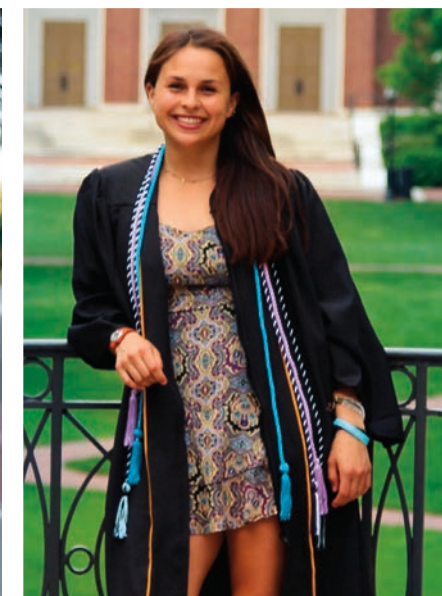


SCHOLARSHIP IMPACT

The Community Foundation's Scholarship Program was established in 2000 by generous individuals, families, and organizations **to ensure students have the opportunity to pursue their educational dreams.** We administer a variety of scholarships for high school seniors, undergraduates and re-entry students. Annually awarding at least **60 scholarships totaling more than \$250,000**, each scholarship has individual criteria, deadline and requirements. Scholarships are awarded to students in every school district for their academic rigor, financial need, extracurricular achievements or commitment to their community.

IN 2018
MORE THAN
\$260,000
WAS AWARDED
TO 67 STUDENTS
ACROSS SAN
LUIS OBISPO
COUNTY

Over the past decade, beginning with Kelly McAdams and Yeager Science Scholarships, the Foundation started focusing on multi-year scholarship awards to support a student for all four years of university. In 2018, we celebrated the graduation of seven multi-year scholarship recipients who received more than **\$100,000** in scholarship support. Scholarship recipients studied engineering, mathematics, nursing, cellular biology, psychology, and chemistry while attending the following universities: Johns Hopkins University, University of Notre Dame, University of Portland, UC Berkeley, and Cal Poly San Luis Obispo.



SINCE 2000,
1,000 STUDENTS
HAVE BEEN
AWARDED
\$2.3
MILLION
IN SCHOLARSHIP
SUPPORT

Alfred I., Catherine J., and Eleanor G. Switzer Scholarship

The Alfred I., Catherine J., and Eleanor G. Switzer Scholarship was founded when Mr. Switzer established an endowed scholarship as his legacy in 2005. Since its inception, this fund has provided seven multi-year scholarships to children in Los Osos worth **\$108,000** over the years. Each recipient receives a **\$16,000** scholarship over the course of four years. One recipient, Jerome Andres, will be graduating this fall and has already accepted a full-time position as a Medical Fellow at East Bay Ophthalmology.



SPECIAL PROGRAMS

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

IN OUR BACKYARD

We are committed to educating members of The Community Foundation family about issues in our community. These education sessions are part of a broader In Our Backyard series, which is an interactive forum for our donors to engage in dialogue with local nonprofits. In 2018, we offered four compelling In Our Backyard donor education events, highlighting Impact Arts, Our Healthy Kids, Prepare for the Unexpected, and All Girls Matter.



THE WOMEN'S LEGACY FUND

The mission of the Women's Legacy Fund is to be a catalyst for philanthropy that improves the lives of women and girls in San Luis Obispo County. To date they have awarded more than **\$350,000** in grants and built a **\$1.4 million-dollar** endowment. In 2018, **\$65,000** was awarded in grants to local programs that empower girls with the skills, knowledge, and support to overcome gender inequities, stereotypes and build resilience. Approximately 700 community members attend the annual luncheon each September.

THE GROWING TOGETHER INITIATIVE FUND

The Growing Together Initiative (GTI) Fund provides grants to local organizations that address issues and the needs of the county's lesbian, gay, bisexual and transgender community. Since its inception in 2001 GTI has provided more than 100 grants totaling over **\$282,000** to provide **support for a safe and supportive environment** for our LGBTQ community.



ACCESS FOR ALL FUND

Access for All's (AFA) mission is to advocate for an accessible, diverse, and welcoming community that values disability as diversity and encourages the full participation of people with disabilities in all aspects of San Luis Obispo County life. AFA envisions a community in which accommodations and opportunities for citizens with disabilities are equitable to opportunities for the general population.

PROFESSIONAL ADVISORS LUNCHEON

The Annual Professional Advisors Luncheon provides an important educational and networking opportunity for local professional advisors to keep abreast of topics related to the fields of philanthropy and community leadership.



FINANCIAL SUMMARY

As of December 31, 2018

Condensed Statement of Financial Position

Assets		Liabilities & Net Assets	
Cash & Cash Equivalents	\$3,230,202	Payables & Other Liabilities	\$656,243
Investments, Carried at Market Value	47,221,299	Liabilities Under Split Interest Agreements & Charitable Remainder Trusts	580,194
Notes Receivable & Other Assets	1,284,148	Funds Held for Agencies	3,092,886
Beneficial Interest in Charitable Remainder Trusts & Charitable Gift Annuities	1,834,534	Total Liabilities	\$4,329,323
Property & Equipment <small>(NET OF ACCUMULATED DEPRECIATION)</small>	1,579,270	Net Assets	\$50,820,130
TOTAL ASSETS	\$55,149,453	TOTAL LIABILITIES & NET ASSETS	\$55,149,453

Financial information is based on audited financial statements prepared by Caliber Audit & Attest, LLP. Audited statements and Form 990 available at cfsloco.org. Financial Statement presentation of years 2017 & 2018 includes the adoption of FASB ASU 2016-14

Founders

M. Richard & Joyce J. Andrews Foundation in honor of Carrol Pruett	Linda & Terence Fibich	Carol J. Hanna, M.D. & Pamela J. Lee, Ph.D.	Linda & Greg McMillan	Betty Schetzer
Lyn & Jim Baker	Morgan Flagg Family Foundation in memory of Lou & Lori Flagg	Walter Clay Hill	Lou & Dean Miller	Carol & Warren Sinsheimer
Barbara Bell	Vel & Abe Flory	Clifford B. Holser	Kimo Pankey	Norma & Jim Sinton
John & Barbie Butz & Family	Joan & Lawrence Foelker	Perry & James Jamieson	Barbara & John Partridge	Jane & Steve Sinton
Vicki & Howard Carroll	Ann C. Freeman	Letha & Glenn Josephson	Carolyn & Michael Pineau	Johnine & Brian Talley
Paula & Chris Daman	Diane & Al Fritz	Dee Lacey	Diane & Nick Pokrajac	Rosemary & Don Talley
Alison & John Denlinger	Patricia Gomez & Frank Seiple	Linda & Wayne Lewis	Joan & Carrol Pruett	Susan & Ke-Ping Tsao
John DeVincenzo		Lisa Kilburn Maino & James F. Maino	Laurie & Rob Rossi	Cindy & Karl Wittstrom
			Carol & Jerry Santens	

20 YEARS of IMPACT ANNIVERSARY CELEBRATION

On Sunday, October 28, 2018, The Community Foundation founders, friends, and community partners gathered at the historic Santa Margarita Ranch as we celebrated **20 years of impact** in our community and toasted the future impact we will continue to create together. We are pleased to have awarded **more than \$36 million in grants and scholarships** since our founding in 1998.

*Here's to the
next 20 YEARS!*

