Staff - 2019
Heidi H. McPherson, Chief Executive Officer
Karen Bohony, Finance Associate
Briana Fox, Office Manager / Executive Assistant
Trish Hammond, Director of Finance and Administration
Angela Holland, Senior Scholarship Program Associate
Eve McCall, Communications and Program Associate
Len Smolburd, Grants Manager

Special Thanks
The Community Foundation donors, volunteers, nonprofit grantee partners, and our many committees and Board members.
Thanks to (S) DESIGN for making this annual report possible. www.isoeyes.com

Photo Credits
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

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.

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
Boards Officers
Mary Verdin – President
Arroyo Grande
Heidi H. McPherson – Chief Executive Officer
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

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
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 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.
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

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health &amp; Human Services</td>
<td>$1,533,482</td>
</tr>
<tr>
<td>Community Enhancement</td>
<td>$925,035</td>
</tr>
<tr>
<td>Scholarships</td>
<td>$265,350</td>
</tr>
<tr>
<td>Education</td>
<td>$259,857</td>
</tr>
<tr>
<td>Arts</td>
<td>$223,702</td>
</tr>
</tbody>
</table>

**644 TOTAL GRANTS**

- **29%** Community Enhancement
- **29%** Health & Human Services
- **8%** Scholarships
- **8%** Education
- **7%** Arts

**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.

“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
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 organizations and have a better understanding of the needs of the region.

In 2018 more than $3,200,000 Awarded in Grants & Scholarships

“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

86 DONOR-ADVISLED FUNDS

577 GRANTS IN 2018

67 SCHOLARSHIPS IN 2018

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 tit’ u Northern Chumash tribe developed a program designed to celebrate and educate our community about their history, culture, and relationship with the environment.

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

DONOR IMPACT

In 2018
$3,200,000
Awarded in Grants & Scholarships

Collaborative Funding

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

**Scholarship Impact**

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

**Over the past decade**, beginning with Kelly McAdams and Yasgar 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.

**In 2018 more than $260,000 was awarded to 67 students across San Luis Obispo County**

**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.
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.
As of December 31, 2018

Condensed Statement of Financial Position

**Assets**
- Cash & Cash Equivalents: $3,230,202
- Investments, Carried at Market Value: 47,221,299
- Notes Receivable & Other Assets: 1,284,148
- Beneficial Interest in Charitable Remainder Trusts & Charitable Gift Annuities: 1,834,534
- Property & Equipment (NET OF ACCUMULATED DEPRECIATION): 1,579,270

**Liabilities & Net Assets**
- Payables & Other Liabilities: $656,243
- Liabilities Under Split Interest Agreements & Charitable Remainder Trusts: 580,194
- Funds Held for Agencies: 3,092,886

**Total Liabilities**
- $4,329,323

**Total Assets**
- $55,149,453

**Net Assets**
- $50,820,130

**Total Liabilities & Net Assets**
- $55,149,453

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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.

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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!

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Founders

M. Richard & Joyce J. Andrews Foundation in honor of Carol Powett
Lynn & Jim Baker
Barbara Bell
John & Barbara Bula & Family
Vicki & Howard Carroll
Paula & Chris Damon
Alison & John Denlinger
John DeVincentis

Linda & Terrence Fibich
Morgan Flagg Family Foundation in memory of Lou & Lori Flagg
Val & Abe Flory
Joan & Lawrence Foilker
Ann C. Freeman
Diane & Al Fritz
Patricia Gomes & Frank Angelle
Carol J. Hanna, M.D. & Pamela J. Lee, Ph.D.
Walter Clay Hill
Clifford B. Holwer
Perry & James Jamieson
Letha & Glenn Josephson
Dee Lacey
Linda & Wayne Lewis
Lisa Kilburn Mamo & James F. Mamo
Linda & Greg McMillan
Lou & Dean Miller
Kimo Pankey
Barbara & John Partridge
Carolyn & Michael Pineau
Diame & Nick Politac
Joan & Carrol Proutt
Laurie & Rob Rossi
Carol & Jerry Santens

Betty Schetzer
Carol & Warren Sinsheimer
Norma & Jim Sinton
Jane & Steve Sinton
Johnnie & Brian Talley
Rosemary & Don Talley
Susan & Ke-Ping Tso
Cindy & Karl Wittstrom

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