## THE Community FOUNDATION SAN LUIS OBISPO COUNTY



IMPACT REPORT

# **DEAR** COMMUNITY FOUNDATION FAMILY,

As we compiled the information within our 2019 Community Impact Report, it was hard to imagine what we would face in the coming months of 2020. However, while this report serves as an opportunity to share and celebrate the work we did last year, our current environment serves as a reminder of the dire need for ongoing support of community impact.

Last year marked \$37 million in grants and scholarships that The Community Foundation has been a catalyst to reinvesting into San Luis Obispo County since its inception. In the following pages you will find examples of how this tremendous support has directly impacted our families, friends and neighbors.

Every day we are proud to be a part of the family that supports The Community Foundation San Luis Obispo County. When faced with challenging times, such as these, we are comforted by the confidence in working alongside the leaders in philanthropic giving, such as yourselves.

We look forward to continuing the critical work of The Community Foundation and to growing our impact in San Luis Obispo County, a place we are all so fortunate to call home.

Thank you,



Tom Sherman President



Heidi H. McPherson Chief Executive Officer

MIK

With your support, we can ensure The Community Foundation continues to support those in need across San Luis Obispo County.

# 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.** 



#### BOARD OFFICERS

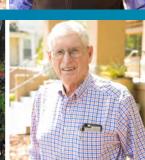
Tom Sherman, President San Luis Obispo Jeff Buckingham, Vice-President Los Osos Joan Parker, Treasurer San Luis Obispo Sandy Dunn, Secretary Avila Beach

Jim Brabeck, Los Osos Grenda Ernst, Atascadero Gwen Erskine, Templeton Suzanne Fritz, Atascadero Ben McAdams, San Luis Obispo Steve McCarty, San Luis Obispo Anita Robinson, Atascadero Linda Sommers Smith, San Luis Obispo Bill Thoma, Avila Beach

Kathy Thompkins, Arrovo Grande

Mary Verdin, Arroyo Grande











#### **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 Mary Verdin, 2017-2018

# GRANTS

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

#### IN 2019 THF FOUNDATION AWARDED

## 552 grants

## IN THE AMOUNT OF \$2,492,714

#### THE LAND CONSERVANCY

As one of the best places to live, area residents are fortunate to benefit from The Land Conservancy of San Luis Obispo County. The projects and programs of this nonprofit have an important impact.

Since 1984, they have permanently conserved over 24,000 acres of land ensuring we have wild natural areas, productive family farms and ranches, clean fresh water, and stunning landscapes forever.

Octagon Barn

Thanks to our donors, The Community Foundation awarded *more* than \$42,000 in grants to The Land Conservancy programs, including the Pismo Preserve, the restoration of the Octagon Barn and the educational Learning Among the Oaks programs.

\$373,316 NOUR ADUCA ARTS COMMUNITY ENVIANCE GRANT FUNDING ALLOCATION \$2,492,714

HEALTH & HUMAN SERVICES

\$945,243

TOTAL

SCHOLARSHIPS

# IMPACT THROUGH collaboration

SOCIAL INNOVATIONS FUNDING COLLABORATIVE

Social Innovations Fund (SIF) is a collaboration of funders committed to supporting innovative programs of our nonprofit organizations which focus on an individual client's personal fulfillment and growth. Funding provided through SIF encourages nonprofits to take risks and explore new opportunities.

In 2019, a two-year grant award of \$50,000 was presented to Courtney's House, which provides vocational and employment opportunities for adults with intellectual and developmental disabilities, helping them find and celebrate their strength as well as their value in our community. Their mission to provide a safe, supportive, inclusive environment for building social and life skills through personal fulfillment and growth is also creating systemic change, as the community interacts with their interns and employees. Grantee FIG AT COURTNEY'S HOUSE



Adults with developmental disabilities receive job training at Fig at Courtney's House

MISC.PROGRAMS **\$21,267** 

\$234,0

#### IN 2019, THE SCHOLARSHIP PROGRAM GRANTED

## 69 SCHOLARSHIPS AND AWARDS

## IN THE AMOUNT OF

# \$247,250

The Community Foundation's Scholarship Program was established in 2000 by generous individuals, families, businesses and organizations to ensure local students have the opportunity to pursue their educational dreams. We manage a variety of scholarships and awards for high school and college students.

#### JENNIFER THOMA MEMORIAL BALLET SCHOLARSHIP

Bill Thoma contacted the Foundation about his family's interest in establishing the annual scholarship as a means of keeping his wife, Jennifer's, passion for the art of ballet alive following her passing in 2012. The Jennifer Thoma Memorial Ballet Scholarship was established to help local dancers realize their dreams by providing support to attend summer intensive training programs. Jennifer touched lives in ways she never fully realized and will continue to do so into the future through this scholarship.

In 2019 the Jennifer Thoma Memorial Ballet Scholarship was awarded to Grace Shirley, age 15, an honor student at Templeton Independent Study High School. The \$2,500 scholarship provided support for Grace to attend a summer intensive ballet training program in the summer of 2019.



Grace Shirley, 2019 Jennifer Thoma Memorial Ballet Scholarship



Paso Robles High School senior Tyler Schimke shared the impact of receiving the 2019 Douglas DeGross Scholarship in Automotive Studies. He explained,

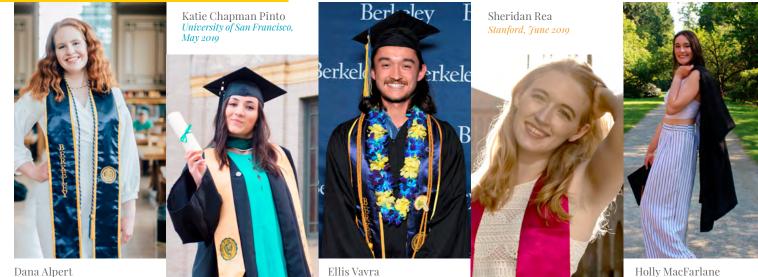
I've always been quiet and sh<mark>y; scho</mark>ol has not been an easy road. I feel valuable now! Having some success has made my life more interesting and I've felt more confident. It has changed life for me and given me a future direction. I'm ready to see where the road will lead.

#### **DOUGLAS DEGROSS SCHOLARSHIP**



Tyler Schimke with his restored tractor

#### **MULTI-YEAR SCHOLARSHIPS**



Berkeley, June 2019

Berkeley, June 2019

Seattle Pacific, June 2019

The college class of 2019 was awarded *\$70,000 in scholarships* that were dispersed throughout four years of college.

Benefitting graduates earned their degrees at the following schools: UC Berkeley, Political Science B.A., Piantanida Scholarship/Weyhrich Award; University of San Francisco, Politics of Transformation B.A., McAdams Scholarship/Weyhrich Award; UC Berkeley, Geophysics, B.A. Switzer Scholarship; Stanford University, Biology B.S. with Computer Science minor, Piantanida Scholarship/Weyhrich Award; Seattle Pacific University, Nursing B.S.N., Coryell Scholarship

# DONORS

We bring together the financial resources of community members, families, organizations, private foundations and local businesses to support the nonprofits that serve and strengthen our communities. Community members may establish a permanent Donor Advised Fund with an irrevocable, tax-deductible contribution. They receive an immediate tax deduction in the year the contribution is made.

For permanently endowed funds, the Foundation manages and invests funds to increase the amount of the gift over time. The donor may then recommend a grant from those funds—either in the form of one large grant or smaller grants over time—to a charitable organization or cause. The Foundation provides guidance and support to donors in deciding when and where to give.

#### LEGACY GIVING

The Community Foundation accepts bequests from donors who have directed in their estate plans that certain assets be transferred to The Foundation and honors the wishes of the donor. By designating a gift, the Foundation can ensure that a donor's impact continues in the community.



I was able to work with the Foundation to identify specific needs I would like my estate to support. This is my home and my heritage. If there is something I can do that shows I care for my community, I know the Foundation will honor those wishes.

— JEANNE HELPHENSTINE, REGARDING ESTATE PLANNING

### THE COMMUNITY FOUNDATION IS DEDICATED TO *improving the lives of* **PEOPLE** IN THE REGION.

Having a Donor Advised Fund at the *Foundation comes with many benefits.* Some are practical, like donating stocks with significant capital gains. I personally appreciate the consolidation of research available and education about the philanthropic landscape in our region. It helps me to understand where I can



generate the most impact." – DR. ANNEKA SCRANTON, DONOR

As a resource for local charitable giving, the Foundation is a vehicle to execute the distribution of donated assets. while considering the changing needs and interests of the region. We are so thankful we came to learn about this organization through our involvement with Kelly's scholarship.

> DR. BEN & PAT MCADAMS, ON THEIR DAUGHTER'S MEMORIAL SCHOLARSHIP OFFERED THROUGH THE FOUNDATION

# **SPECIAL** PROGRAMS

The Community Foundation recognizes that many different factors contribute to healthy, vibrant and thriving communities. *Field of Interest Funds* support specific areas of interest, such as the arts. education or underserved segments of the population. A highlight of some of the Field of Interest funds at The Community Foundation include the WOMEN'S LEGACY FUND, GROWING TOGETHER: AN LGBTQ FUND, AND ACCESS FOR ALL FUND.

GIRLS SELF ESTEEM PROGRAMS RECEIVED \$60,000 IN FUNDING TO EMPOWER GIRLS WITH THE SKILLS, TO **OVERCOME** GENDER **BUILD RESILIENCE.** 

## MORE THAN \$22,000 DIVERSITY TO OUR LGBTO

COMMUNITY.







AN ACCESS TO HEALTHCARE PRESENTATION WAS OFFERED TO HEALTH PROFESSIONALS ENSURING COMPETENT AND ACCESSIBLE HEALTHCARE FOR PEOPLE WITH DISABILITIES.

#### IN OUR BACKYARD

In Our Backyard is an education program for Foundation donors to share conversations with the agencies that are providing needed services

in our community. In 2019,

we offered three unique interactive education sessions for our donors as part of our popular In Our Backyard series. Programs included: ABCs for Success: Early Literacy, Homelessness on the North Coast, and Full Speed Ahead to Successful Futures for Girls.

Pictured: Donors learn about nonprofit programs providing support across San Luis Obispo County.



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. A highlight at this year's luncheon was a speech by scholarship recipient Andrew Galassi. His enthusiastic presentation about his

internship at NASA's Jet Propulsion Laboratory and his work on the Mars rover, was exciting for everyone. Andrew also shared about the impact our scholarship has had on his college career and opportunities.

Pictured: Keynote speaker and scholarship recipient Andrew Galassi with scholarship funder Alan D. Stephenson.







Through the Disaster Support Fund, The Community Foundation offers a way for San Luis Obispo County residents to unite and share in supporting those impacted any devastation. In 2019, we supported our neighbors in both Northern and Southern California who experienced devastating fires and floods.

Pictured: Morro Bay firefighters assist with operations in northern California.

# FINANCIAL SUMMARY

As of December 31, 2019

## CONDENSED STATEMENT OF FINANCIAL POSITION

#### ASSETS

#### LIABILITIES & NET

TOTAL ASSETS	\$66,314,149	TOTAL LIABILITIES & NET ASSETS	\$66,314,149
Property & Equipment (NET OF ACCUMULATED DEPRECIATION)	1,528,093	Net Assets	\$61,486,265
Beneficial Interest in Charitable Remainder Trusts & Charitable Gift Annuities	2,468,538	Total Liabilities	\$4,827,884
Notes Receivable & Other Assets	1,716,320	Funds Held for Agencies	3,346,475
Investments, Carried at Market Value	56,659,209	Liabilities Under Split Interest Agreements & Charitable Remainder Trusts	802,549
Cash & Cash Equivalents	\$3,941,989	Payables & Other Liabilities	\$678,860

Financial information is based on un-audited financial statements as the time of printing. Audited statements and Form 990 will be available at www.cfsloco.org.



550 Dana Street, San Luis Obispo, CA 93401

facebook.com/TheCommunityFoundation-SanLuisObispoCounty

P (805) 543-2323 | info@cfsloco.org

F (805) 543-2346

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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 & Administration* 

Angela Hollander Senior Scholarship Program Associate

**Cecelia Mazelin** Donor Services Coordinator

Erin McCall Communications & Program Associate

**Len Smolburd** *Grants Manager* 

**Sarah Twissleman** Grants & Scholarship Program Assistant

#### **Special Thanks**

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

Thanks to **Badger Branding** for making this annual report possible. **badgerbranding.com** 

#### **Photo Credits**

Rob DeGraff, Jennifer Olson, John Neylan, Ashley Blake, Norelle M., Marcio Jose Sanchez, Erin McCall and Fig at Courtney's House



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 & Don Talley | Susan & Ke-Ping Tsao | Cindy & Karl Wittstrom