

COMMUNITY FOUNDATION
OF SAN JOAQUIN

2013 Annual Report



“The vineyards of philanthropy are pleasant places, and I would hope good men and women will be drawn there. Most of all, I would hope it will be better understood that if these vineyards are to thrive and bear their best fruit, they must always have first-class attention.”

– HAROLD J. SEYMOUR

501 W. Weber Ave, Suite 200-D
Stockton, CA 95203

672 West 11th Street
Tracy, CA 95376

(209) 943-2375

assistant@cfofsj.org
www.cfofsj.org

MESSAGE FROM THE CEO

CEO & President



Linda Philipp

The Community Foundation of San Joaquin is on the move – literally and figuratively! In March 2014 we acknowledged that we had outgrown our original space graciously provided by CB Merchant Services and moved to new offices at the Waterfront Towers in Stockton. Our new address is 501 W. Weber Avenue, Suite 200-D, in Stockton. We hope you'll drop in to say hello whenever you're nearby.

2013 was another year of positive advancement:

- Funds increased – we added 20 new funds in 2013 and another 9 so far in 2014 for a total of 67
- Grants increased – we contributed \$672,899 to local, regional and national nonprofit charities
- Assets increased – at the end of 2013, we had \$4,700,000 in assets
- New donor portal a success – fund holders are now easily making grant requests online
- Staff added – we welcomed Patti Kolodziej as our new executive assistant
- Ripon Community Fund – was established to support the Ripon Community thanks to the efforts of its dedicated volunteers and board members

STAFF

Controllor



Julie Minton

In January of this year, we were delighted to welcome two new members to our Board of Directors – Kevin Hawes of Ripon and Colleen Stewart of Lodi. It is a both a privilege and a pleasure to serve with all of our directors who work year round to help promote and fulfill the mission of the Community Foundation of San Joaquin. Special kudos to Robert Kavanaugh who serves as our Finance and Investment Committee Chair. He and his astute committee help to ensure our fiscal viability and outstanding investment results along with our professional investment managers at Bank of Stockton Wealth Management Group and Morgan Stanley.

Executive Assistant



Patti Kolodziej

Ultimately, everything we do is about relationships. CFOSJ's goal is to build bridges that lead to improved relationships between donors, companies, agencies and the people they serve. With that as our core value, we wish to express our deep appreciation to the local company who gave us our start – CB Merchant Services. Without the benefit of the incubation provided, ongoing support and the vision of its Board of Directors, the Community Foundation of San Joaquin would not exist. So, thank you CB Merchant Services from all of us at CFOSJ. You have made this community a much better one, and for that, we will all be eternally grateful.

Linda Philipp

BOARD OFFICERS & DIRECTORS

Chairperson



Duane Isetti

Vice Chairperson



Cynthia Souza

Treasurer



David Vaughn

Secretary



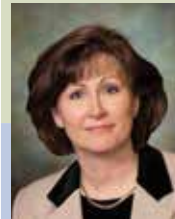
Ted Leland

Past Chairman



Teresa Mandella

Vice President



Linda Guinn



Scott Beattie



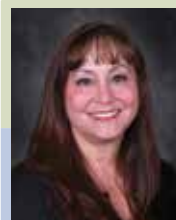
Robert Kavanaugh



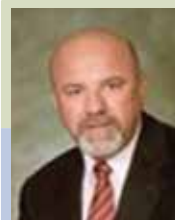
Kevin Hawes



Charles Patmon III



Colleen Stuart



David Vaccarezza

LET'S GET STARTED CREATING A FUND:

Decide when and what to give, pick a name and choose a fund type. It's that easy!

DONOR ADVISED FUNDS – Allows the donor to donate now, grow funds and recommend specific grants at a later time

Yusuf A. Bargoma Fund for the Arts
 Mary and Dan Bava Fund
 Beattie Family Charitable Fund
 Joan C. Beattie Memorial Fund
 Lorna L. Boothroyd Fund
 C B Merchant Services Charitable Fund
 C. Joseph and Helen Crane Family Fund
 Chispita Fund
 Michael P. Duffy Family Fund
 Funamura/Loy Family Fund
 Grewal Family Fund
 Jim and Kathy Hanley Family Fund
 ILWU Community Action Fund (pending)
 Kavanaugh Family Fund
 Kids Taking a Stand Fund
 Ted and Stefanie Leland Family Fund
 Mandella Fund
 Sandra Mazzuola Fund
 Charles Gordon Patmon and Dorothy Norris Patmon
 Perpetual Memorial Fund
 Paul and Irene Perkins Family Fund
 Petrick Charitable Fund
 Lawrence and Linda Philipp Family Fund
 Bill Pollard Scholarship Fund
 Louis and Audrey Shoneff Charitable Fund
 Brian Matthew Stocker Charitable Fund
 TSH Fund
 John R & Francesca Vera Family Fund
 Nishka M. Yudnich Fund

DESIGNATED FUNDS – Provide support to a specific nonprofit or area through a long-term gift

Board of Directors/Founders Fund
 CFOSJ LLC
 Community Philanthropy Summit
 Super Bowl Raffle

LEGACY SOCIETY – Planned gift for charitable causes for the benefit of future generations

Duane Isetti – FBO United Way
 Robert V. and Janet S. Kavanaugh

FIELD OF INTEREST FUNDS – Provide support to a specific geographic area or interest/field.

Ripon Community Fund



The Ripon Community Fund was established in 2013 to respond to and support community needs in Ripon. Pictured are the founders Kevin Hawes, Kristine Griesheimer and Julie De Araujo.

AGENCY FUND – A simple, efficient way to create sustainability for nonprofits

Alpha Psi Foundation
 Animal Friends Connection Humane Society
 Central Valley Youth Symphony
 Child Abuse Prevention Council of San Joaquin County
 Child Abuse Prevention Council Foundation
 Delta College Foundation
 Emergency Food Bank of Stockton
 Family Resource and Referral Center
 IMPACT
 Kiwanis Club of Stockton Foundation
 Mediation Center
 one.TLC School for Homeless Children Foundation
 San Joaquin County Bar Foundation
 San Joaquin County Office of Education Educational Foundation
 San Joaquin Medical Society Scholarship Loan Fund
 St. Mary's Dining Room
 Seeds to the World
 The First Tee of San Joaquin
 The Stockton Fund for Animals
 United Cerebral Palsy
 Women's Center Youth and Family Services

AGENCY ENDOWED FUNDS – Long-term funding mechanism to create sustainability

Animal Friends Connection Humane Society Endowment
 Assistance League of Stockton Endowment
 Boys & Girls Club of Tracy Endowment
 CFOSJ Endowment
 Grand Foundation Endowment
 Hospice of San Joaquin Endowment
 SAIL Endowment
 United Cerebral Palsy Endowment

Funds by Year



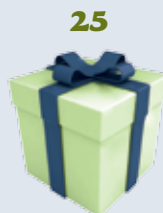
2008



2009



2010



2011



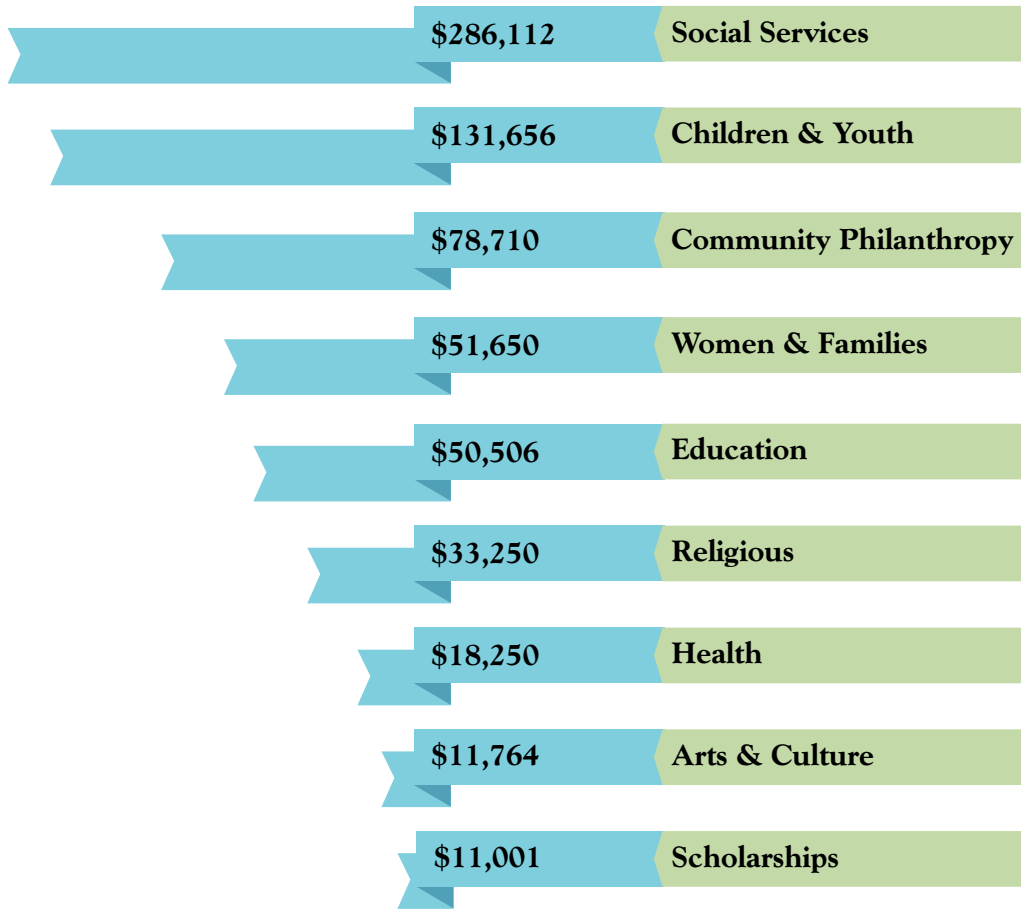
2012



2013

2009-13 GRANT SUMMARY

2013 Grant Summary



Grants by Year



GRANTS

Totaled \$672,899 in 2013



These young philanthropists known as "Kids Taking a Stand" have been raising funds for cancer services at St. Joseph's Medical Center for several years. They have opened a Donor Advised Fund so that donors may contribute to their efforts year round.



The CFOSJ RV was transferred as the result of a generous grant from the Louis and Audrey Shoneff Charitable Fund to the Pregnancy Help Center for its use as a Mobile Clinic. The net proceeds from this gift benefit both the Hospice of San Joaquin and CFOSJ.

- Alpha Psi Foundation
- American Cancer Society
- American Heart Association
- American Leprosy Missions
- American Red Cross
- ARC San Joaquin
- Bear Creek HS Educational and Athletics Foundation
- Boys & Girls Club of Lodi
- Boys & Girls Club of Manteca/Lathrop
- Boys & Girls Club of Stockton
- Boys & Girls Club of Tracy
- Braille Books for Blind Children
- California Association of Collectors Edu. Scholarship
- Catholic Relief Services
- Child Abuse Prevention Council
- Children's Home of Stockton
- Children's Hospital Research Center Foundation Oakland
- Children's Museum of Stockton
- Colonial Williamsburg
- Community Foundation of San Joaquin
- Community Partnership for Families
- Cystic Fibrosis Foundation
- Delta Humane Society
- Disabled American Veterans
- Doctors Without Borders
- Emergency Food Bank
- First Tee of San Joaquin
- Give Every Child a Chance
- Goodwill Industries of SJ
- Gospel Center Rescue Mission
- GOT Kids - McNair HS Athletics
- Haven of Peace
- Haven Women's Center
- Hospice of San Joaquin
- Immaculate Heart Radio
- IMPACT
- InterFaith Ministries of Greater Modesto
- Jagged Lines of Imagination Academy, Inc.
- Junior Achievement
- LadyBugs
- Lodi Community Foundation
- Lodi House
- Make-A-Wish Foundation
- Mary Graham Children's Shelter Foundation
- MaryKnoll Fathers and Brothers
- McHenry House
- Mediation Center of San Joaquin
- Mexican American Hall of Fame
- one.TLC School for Homeless Children
- Operation Smile
- Paralyzed Veterans of America
- Pregnancy Help Center of Stockton
- Ripon Community Fund
- Running Strong for American Indian Youth
- Salvation Army
- Salvation Army - Lodi Hope Harbor
- San Joaquin County Office of Education Educational Foundation
- San Joaquin County Zoological Society
- Scottish Rite Childhood Language Disorders
- Second Harvest Food Bank
- SEEDS/Catholic Charities
- Special Olympics
- St. Anne's Church
- St. Anne's School
- St. Joseph's Foundation of San Joaquin
- St. Mary's College
- St. Mary's Dining Room
- Stockton Shelter for the Homeless
- Stockton Symphony
- Sunflower Presents
- Tiger Aquatics
- Tracy Interfaith Ministries
- United Cerebral Palsy
- United Way of San Joaquin County
- University of the Pacific
- UOP - Athletics
- UOP - Harmony Stockton
- Women's Center Youth & Family Services
- YMCA of San Joaquin County

EVENING OF GRATITUDE



Linda Guinn and Bob Kavanaugh of CB Merchant Services accept the first Community Partner Award from CFOSJ Board Chair Duane Isetti



Pregnancy Help Center Executive Director Nikki Lowery expresses gratitude for the RV that will be used as a mobile clinic.



Drs. Janwyn and Jack Funamura



Jaime Mousalimas, Leslie Heier, Janet Dial and Scott Beatermann

The Community Foundation of San Joaquin held an Evening of Gratitude in February 2014 to recognize outgoing and incoming board members, thank fund holders for their participation and support, and acknowledge grants made. CB Merchant Services was awarded the first Community Partner Award in recognition of their ongoing community support and incubation of the Community Foundation of San Joaquin.

CFOSJ IN THE COMMUNITY



(Back row, L to R): Janelle Nelson - SASS! PR, Linda Guinn - CB Merchant Services, Teresa Mandella and Linda Philipp - CFOSJ (Front row, L to R): Patti Kolodziej and Julie Minton - CFOSJ, Anna Sass - SASS! PR, Duane Isetti - CFOSJ



34th Annual Women's Center Youth & Family Services Luncheon (Back row, L to R): Rebekah Burr-Siegel - SJ Bar Association, Linda Philipp and Colleen Stewart - CFOSJ, Barbara Workman - Habitat for Humanity, Sabrina Schneweis-Coe - Downey Brand/CFOSJ (Front row, L to R): Duane Isetti and Bob Kavanaugh - CFOSJ, Nikki Lowery - Pregnancy Help Center



Athena Awards
(Back row, L to R): Lindy Turner-Harden - Child Abuse Prevention Council, Renee Hall - Drummond & Associates, Kay Ruhstaller - Family Resource & Referral Center, Sandy Stoddard - Hospice of SJ, Teresa Mandella - CFOSJ (Front row, L to R): Ana Molina - CB Merchant Services, Cynthia Souza and Linda Philipp - CFOSJ, Lisa Richmond and Dr. Janwyn Funamura - SJ Medical Society



Lynne Davis, community volunteer and board member, Linda Philipp, CFOSJ CEO, and Barbara Workman, Habitat for Humanity Executive Director, attend a meeting of the Rotary Club of Stockton



Carmen Policy's Wife, Faye Spanos and Dea Spanos Berberian, recipient of the Goodwill Helping Hands Award for 2013

— EVENING OF GOODWILL —



Bob, CFOSJ Finance Chair & his wife Janet Kavanaugh



Janet Dial and Georgette Hunefeld of University of the Pacific with Linda Philipp



3RD ANNUAL
COMMUNITY
 PHILANTHROPY SUMMIT
 NOVEMBER 2013



SAVE THE DATE

4TH ANNUAL
COMMUNITY
 PHILANTHROPY SUMMIT

TUESDAY, NOVEMBER 13, 2014 • HUTCHINS STREET SQUARE • LODI, CA
www.philanthropy-summit.com



2013 RAFFLE

**WATCH FOR
2014 SUPERBOWL
RAFFLE INFORMATION
COMING SOON!**



Ralph Saroyan of Alpha Psi Foundation accepts the award for highest percentage sold above gold.



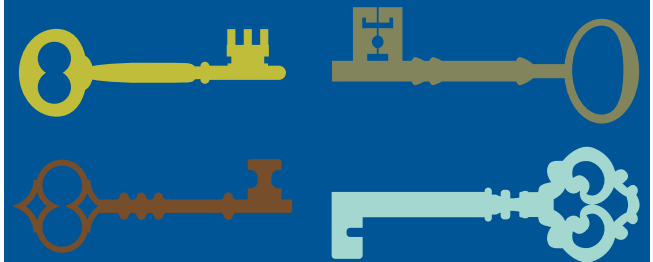
2013 Super Bowl Raffle Committee



*Brenda Castellanos – Haven of Peach,
Patrice Davidson – Delta Humane Society*



And the Winner is....



**The Community
Foundation
is Growing!**

We've Moved!

501 W. Weber Avenue, Suite 200-D
Stockton, CA 95203


COMMUNITY FOUNDATION
OF SAN JOAQUIN