“The best use of life is to invest it in something which will outlast life.”

– William James
What an exciting time at the Community Foundation of San Joaquin! We are growing, exploring and trying new ways to serve donors, nonprofit organizations, professional advisors and everyone who seeks to make our community a better place through charitable giving.

2012 saw tremendous advancements in so many areas:
• Funds increased – we added 14 new funds last year
• Grants increased – we contributed $467,000 to local, regional and national nonprofit organizations
• Assets increased – at the end of 2012, we had $3,700,000 in assets
• New donor portal added – fund holders may now view their fund information in a secure online environment any time they wish to view their balances, giving history, agency updates or to make a grant
• Staff added – we welcomed Brittany Griffin, executive assistant, and Julie Minton, controller, to the CFOSJ Team
• Second Annual Community Philanthropy Summit – drew 200 to this successful annual local conference on philanthropy co-hosted by CFOSJ and the Lodi Community Foundation
• Fifth Annual Super Bowl Raffle – we were invited to serve as the Lead Managing Agency for this annual project that raised more than $330,000 for 26 local charities thanks to the generosity of the Alex and Faye Spanos Family and ticket buyers everywhere!

In addition, we were delighted to welcome Moses D. Elam, MD, physician in chief for Permanente Medical Group to the CFOSJ Board of Directors. Dedicated director Teresa Mandella assumed the role of Board Chair in 2013 and is ably assisted by Vice Chair Duane Isetti, Secretary Cynthia Souza, and Treasurer David Vaughn. 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. To a person, these are well-known community leaders who bring passion and energy to this organization and our communities.

Who knows what the future will bring? While some of our residents and municipalities continue to struggle, others are blossoming. Our country is thankfully recovering from one of the worst financial downturns in history, but it is a slow recovery at best with ups and downs along the way. One thing I do know for sure (thank you, Oprah), is that your Community Foundation of San Joaquin will be here ready to support this entire region through both the challenges and the triumphs. We hope you will join us.

Linda Philipp
CEO and President
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!

THE COMMUNITY FOUNDATION OF SAN JOAQUIN OFFERS A VARIETY OF FUNDS...

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
- Beattie Family Charitable Fund
- Joan C. Beattie Memorial Fund
- Lorna L. Boothroyd Fund
- C.B. Merchant Services Charitable Fund
- Calone Law Group and Business Journal Secret Santa Fund
- C. Joseph and Helen Crane Family Fund
- Chispita Fund
- Michael P. Duffy Family Fund
- Grewal Family Fund
- Kids Taking a Stand Fund
- Ted and Stefanie Leland Family Fund
- The Mandella Fund
- Sandra Mazzuola Fund
- Charles Gordon Patmon and Dorothy Norris Patmon Perpetual Memorial Fund
- Paul and Irene Perkins Family Fund
- Lawrence and Linda Philipp Family Fund
- Bill Pollard Scholarship Fund
- The Louis and Audrey Shoneff Charitable Fund
- TSH Fund
- John R. & Francesca Vera Family Fund
- Nishka M. Yudnich Fund

AGENCY FUND – A simple, efficient way to create sustainability for nonprofits
- Alpha Psi Foundation Agency Fund
- Child Abuse Prevention Council of San Joaquin County Agency Fund
- Child Abuse Prevention Council Foundation Agency Fund
- Emergency Food Bank of Stockton Agency Fund
- Family Resource and Referral Center Agency Fund
- IMPACT Agency Fund
- Kiwanis Club of Stockton Foundation Agency Fund
- one.TLC School for Homeless Children Foundation Agency Fund
- San Joaquin County Bar Foundation Agency Fund
- San Joaquin County Office of Education Educational Foundation Fund
- St. Mary’s Dining Room Agency Fund
- The Stockton Fund for Animals
- United Cerebral Palsy Agency Fund
- Women’s Center Youth and Family Services Agency Fund

Lemonade Stand – These young philanthropists known as “Kids Taking a Stand” have been raising funds for cancer services for several years. They have opened a Donor Advised Fund so that donors may contribute to their efforts year round.

AGENCY ENDOWED FUNDS – Long-term funding mechanism to create sustainability
- Assistance League of Stockton Endowment
- Boys & Girls Club of Tracy Endowment
- Grand Foundation Endowment
- Hospice of San Joaquin Endowment
- SAIL Endowment
- United Cerebral Palsy Endowment

DESIGNATED FUNDS – Provide support to a specific nonprofit or area through a long-term gift
- Board of Directors/Founders Fund
- CFO SJ 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

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Funds by Year

- 2008
- 2009
- 2010
- 2011
- 2012
2012 Grant Summary

- Social Services: $150,512
- Children & Youth: $137,725
- Women’s Services: $51,202
- Health Care: $42,600
- Education: $32,325
- Philanthropy: $15,265
- Scholarships: $9,500
- Arts/Culture: $6,861

Grants by Year

- 2009: $3,000
- 2010: $129,800
- 2011: $148,600
- 2012: $467,040
Board Chair Teresa Mandella (L) presented a grant to (from middle to right) Donna Anderson and Joelle Gomez of the Women’s Center Youth & Family Services.

Rebecc Knodt of The Emergency Food Bank of Stockton, Leslie Heier of United Cerebral Palsy, and Lindy-Turner Hardin of the Child Abuse Prevention Council accepted grants for their organizations during the Evening of Gratitude.

Board Secretary Cynthia Souza presented a grant and toured the Tracy Interfaith Ministries facilities with two of the organization's lead volunteers – President Renee Reece and Director Darlene Quinn.
The Community Foundation of San Joaquin held its second Evening of Gratitude in October 2012 to recognize outgoing and incoming board members and thank fund holders for their participation and support. Guests gathered for cocktails and appetizers at the Stockton Golf and Country Club to learn about the Foundation’s growth and plans. Grants to three local nonprofit groups were also awarded.

Ray Baglietto with his granddaughter Alyssa Petrino

Scott Beattie

Mary Bava, Frank & Teresa Mandella

Assistance League representatives Camilla Wolak, Vi Howard, Peggy Yorke

Cynthia Souza and Linda Philipp attended the American Heart Association’s “Go Red for Women” Luncheon in Stockton to raise awareness and funds for heart disease prevention.

Linda Philipp (L) and Dianne Gini (R) congratulated Gloria Souza on receiving the Tracy Hospital Foundation’s 2013 Champions of Health Award with her husband Tony.

Directors Pat Patmon and Duane Isetti made a presentation about the Community Foundation of San Joaquin to the Rotary Club of Stockton.

CFOSJ representatives were pleased to be present for the first Advancing Women’s Leadership Conference at University of the Pacific in 2012. Back row (L to R): Janelle Nelson, Linda Philipp, Janelle Nelson and Brittanry Griffin; (Front row, L to R): Teresa Mandella, Francesca Vera, Bridget Childs and Carrie Sess.

At the United Way’s Power of One Luncheon were (Back row, L to R): Lisa Richmond, Linda Philipp, Janelle Nelson and Brittanry Griffin; (Front row, L to R): Teresa Mandella, Francesca Vera, Bridget Childs and Carrie Sess.
KEYNOTE SPEAKER
DAN PALLOTA
Innovation Expert & Social Entrepreneur

www.advertisingforhumanity.com

Watch Dan’s TED Talk at www.ted.com
2013 RAFFLE

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DRAWING DATE
December 12, 2013

Super Bowl Tickets generously provided by
Alex & Faye Spanos and Family

☐ Alpha Psi Foundation
☐ American Red Cross
☐ Boys & Girls Club of Manteca/Lathrop
☐ Boys & Girls Club of Tracy
☐ Child Abuse Prevention Council
☐ Children's Home of Stockton
☐ Children's Museum
☐ Community Foundation of San Joaquin
☐ Community Partnership for Families
☐ Delta Humane Society
☐ Disabled American Veterans
☐ Emergency Food Bank
☐ The First Tee of San Joaquin
☐ Goodwill Industries of San Joaquin Valley
☐ Haven of Peace Women's Shelter
☐ Jagged Lines Art Academy
☐ Make-A-Wish Foundation
☐ Mary Graham Children's Shelter Foundation
☐ McHenry House Family Shelter
☐ Mediation Center of San Joaquin
☐ Ripon Community Fund
☐ Scottish Rite Center for Childhood Language Disorders
☐ St. Mary's Dining Room
☐ Tiger Aquatics
☐ United Way of San Joaquin County
☐ YMCA of San Joaquin County