“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
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

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.

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
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

**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**

<table>
<thead>
<tr>
<th>Year</th>
<th>Gifts</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>1</td>
</tr>
<tr>
<td>2009</td>
<td>2</td>
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<tr>
<td>2010</td>
<td>11</td>
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<tr>
<td>2011</td>
<td>25</td>
</tr>
<tr>
<td>2012</td>
<td>39</td>
</tr>
<tr>
<td>2013</td>
<td>58</td>
</tr>
</tbody>
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2013 Grant Summary

- Social Services: $286,112
- Children & Youth: $131,656
- Community Philanthropy: $78,710
- Women & Families: $51,650
- Education: $50,506
- Religious: $33,250
- Health: $18,250
- Arts & Culture: $11,764
- Scholarships: $11,011

Grants by Year

- 2009: $3,000
- 2010: $129,800
- 2011: $148,600
- 2012: $467,040
- 2013: $672,899
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 Shoness 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.
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.
Ralph Saroyan of Alpha Psi Foundation accepts the award for highest percentage sold above gold.

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

2013 Super Bowl Raffle Committee

Watch for 2014 Super Bowl Raffle Information Coming Soon!

We’ve Moved!
501 W. Weber Avenue, Suite 200-D
Stockton, CA 95203

The Community Foundation is Growing!