Message From the CEO

Great things are happening at the Community Foundation of San Joaquin. In 2018, we realized a significant milestone by earning accreditation through the National Standards for U.S. Community Foundations Accreditation Program. This accomplishment represents the Community Foundation’s commitment to going above-and-beyond federal and state law requirements to demonstrate accountability and excellence to communities, policymakers, and the public. We are the first community foundation in San Joaquin County to have attained this prestigious recognition. The accreditation seal signals to donors, grantees, and philanthropic partners that we are a sound place to give and make a difference.

The Community Foundation achieved another significant milestone in 2018—attracting charitable investment from outside the region. The James Irvine Foundation—one of California’s largest foundations—awarded grant funding totaling $200,000 to the Community Foundation to help build its capacity. This generous investment represents the largest, single, unrestricted gift ever received by the Community Foundation to support its charitable work. We are deeply grateful to The James Irvine Foundation for its support and recognizing the important role we serve in San Joaquin County.

The Community Foundation continues to build charitable capital that it can then deploy within an area of interest. In 2018, the Community Foundation began to award grants from the Brian M. Stocker Fund—a field of interest fund dedicated to promoting recreational opportunities and healthy lifestyles for children and youth in San Joaquin County. In the Fund’s first year of grantmaking, more than $100,000 in grants was awarded to various nonprofits. The Brian M. Stocker Fund serves as a way of honoring the memory of Brian M. Stocker, and his belief that athletics can be a catalyst for long-lasting personal growth for our region’s children and youth.

The work and accomplishments of the Community Foundation would not be possible without the generous support of our fundholders. Together, we form a community of philanthropists, united in the belief that we can make a difference in the lives of others, and committed to causes larger than ourselves.

The Community Foundation is appreciative of its many fundholders—individuals, families, businesses, institutions, and nonprofit organizations. It is in great measure that because of them, we can continue to help uplift our region to reach new heights.

Staff

Reyna DeKasha
Operations & Programs Manager

Seth Scales, CPA
Controller

Sharon Baker
Administrative Assistant
PILLAR SOCIETY MEMBERS

The Community Foundation of San Joaquin exists to support and strengthen our community’s charitably-minded people and the causes that matter most. CFOSJ provides leadership, promotes a culture of giving, and cultivates resources that address the needs of our community. Just as a pillar serves to strengthen a structure, members of our Pillar Society will be the mainstay of our organization for years to come.

GOLD
Pat & Cheryl Patmon
The James Irvine Foundation

SILVER
Greg & Noreen Basso

BRONZE
Linda & Larry Philipp
Duane Isetti
Teresa & Frank Mandella
Ted & Stefanie Leland
Robert & Janet Kavanaugh
Bank of Stockton
Rosalio & Ana Zapien Family
James & Colleen Stewart
Scott Beattie
CB Merchant Services
Sue & Don Shalvey
Christopher & Lynn Stocker
Dan & Mary Bava
Amy Shin
Mary Elizabeth Eberhardt
Donors can rest easy that their funds are prudently managed by the Foundation’s Finance and Investment Committee along with our investment advisor, Bank of Stockton, Wealth Management Group. Committee members have extensive expertise in business, investments and other disciplines. The Committee sets investment strategy and monitors investment performance against portfolio benchmarks, and reports to the Foundation’s Board of Directors.

**Finance & Investment Oversight**

**Finance & Investment Committee**
- Mary-Elizabeth Eberhardt, Chairperson, VP Director of Consumer Banking, Bank of Stockton
- Linda Guinn, Co-Chairperson, CEO/President, CB Merchant Services
- Robert Kavanaugh, CEO/President, Stockton Savings Bank (ret.)
- Teresa Mandella, Financial Advisor (ret.)
- Ray McCray, City Treasurer, City of Tracy

**Mark Plovnick**, Director of Economic Development, University of the Pacific (ret.)

**Judy Rodriguez**, Assistant VP Corporate Recruiter, F&M Bank

**Colleen Stewart**, Branch Manager/Sr. Loan Consultant, GEM Mortgage

**Sara Yocum**, Assurance Services Senior Manager, Moss Adam LLP
Grants Made by Year

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>$1,259,725</td>
</tr>
<tr>
<td>2017</td>
<td>$868,940</td>
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<tr>
<td>2016</td>
<td>$1,381,165</td>
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<td>$129,800</td>
</tr>
<tr>
<td>2009</td>
<td>$3,000</td>
</tr>
</tbody>
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2018 TOTAL GRANTS $1,259,725
The Community Health Fund was established in 2017 at the Community Foundation of San Joaquin by a $2 million grant from the Delta Blood Bank Foundation. The Fund aims to support projects and activities that improve healthcare services, health outcomes, and medical education, in San Joaquin and Calaveras Counties.

The Community Foundation received more than $1 million dollars in funding request in 2018, which made the task of selecting grants difficult. The Community Foundation awarded $189,000 in grants.

Committee Members
Amy Shin, Chairperson
Sue Shalvey, Vice Chairperson
Karen Bensch
Colleen Stewart
Lisa Cooper Wilkins
David Jensen
Alan Lange
Duane Isetti
$2,500—St. Mary’s Dining Room
To support the safe disposal of medication from medical services provided to the homeless of San Joaquin County.

$20,000—San Joaquin Medical Society
To support “Decision Medicine/Bridge to Medicine”—a program that exposes high achieving, high school students from under-represented backgrounds to careers in the medical field through activities in a variety of clinical settings and mentorship services.

$25,000—St. Joseph’s Foundation of San Joaquin
To support graduate medical education through the development of new Internal Medicine and OBGYN residency programs in San Joaquin County.

$26,500—Peer Health Exchange
To support the implementation of a skills-based health education partnership to train University of the Pacific students to become near-peer health educators to local Stockton high schools.

$25,000—Emergency Food Bank of Stockton
To address food insecurity and promote better health outcomes by increasing access to healthy foods and providing nutrition education through partnerships with private Child Day Care Facilities within the boundaries of the Stockton Unified School District.

$45,000—Family Resource and Referral Center
To support the utilization of San Joaquin’s 2-1-1 system to increase access to healthcare and prevention services, and reducing barriers to health insurance enrollment among underserved residents in San Joaquin County.

$45,000—HealthForce Partners, Northern San Joaquin Valley
To prepare community residents—particularly underrepresented minorities and low-income individuals, for positions in-demand by healthcare employers by developing career pipelines into the healthcare field through the creation of a regional health-sector partnership.
2018 was the first year the Community Foundation gave out competitive grants from the Stocker Fund. Committee members surveyed the community to invite organizations to apply that fell within the Fund’s area of interest.

Funding for these grants is made possible because of the generosity of the Brian M. Stocker Estate. Brian’s brother, Christopher Stocker, plays an active part in the grant process.

The Brian M. Stocker Fund was established at the Community Foundation in 2013 following the early death of its namesake who spent much of his life in San Joaquin County. Prior to a life-altering accident which rendered Brian Stocker a quadriplegic, Brian was actively engaged in youth and adult aquatics programs. He swam for Lodi Parks and Rec's Mini-sub team at Micke Grove Park, and later Tokay High School.

As an adult, Brian coached youth swim teams for Stockton Rec and swam competitively for the Masters program at University of the Pacific. Brian was a firm believer in coached youth athletics to engage and nurture teamwork, camaraderie and above all healthy living among our community’s youth.

To honor his memory, the Brian M. Stocker Fund supports community-based initiatives which encourage and enhance healthy living, active lifestyles, and wellbeing of young people. We are honored to support this year’s recipients for initiatives we hope will have both an immediate and lasting community benefit.
$5,000—Delta Health Care and Management Services
To support a comprehensive breastfeeding and quality lactation care program for low-income women and their infant.

$5,000—Lodi Boosters of Boys and Girls Sports
To provide scholarships to underserved youth in the City of Lodi to engage in youth sports and provide mentoring services.

$5,000—Stockton Rowing Club
To support the Junior Program Revitalization Project that will provide greater access to opportunities for youth to learn the skill of rowing.

$10,000—Lodi Junior Giants
To promote physical activity and healthy lifestyles for diverse communities in the City of Lodi, by providing capital improvements to support the game of junior baseball.

$10,000—Special Olympics of Northern CA
To provide greater recreational opportunities for students with disabilities through the expansion of school partnerships with Stockton Unified School District.

$20,000—Boys and Girls Club of Tracy
To support a comprehensive health and wellness program whose focus is on promoting healthy eating habits and physical activity for the youth in the City of Tracy.

$20,000—The First Tee of San Joaquin
To promote the game of youth golf through a partnership between the Housing Authority of San Joaquin, One.TLC School for the Homeless, and The Children’s Home of Stockton.

$20,000—Positive Coaching Alliance
To support teaching positive coaching strategies to improve coaching in youth sports throughout San Joaquin County.

$20,000—Aspire Public Schools
To provide greater recreational opportunities for students from South Stockton by promoting the game of soccer through the renovation of Port City Academy’s soccer field into a dual-use field.
Cool Cats and Barking Dogs

The Community Foundation of San Joaquin partners with AG Spanos Companies and the Animal Protection League to raise money for the Stockton Animal Shelter. Before this event started in 2014, about 75% of animals in the shelter were being euthanized. Thanks to partners and sponsors of this event, we have been able to raise money to improve the shelter and buy much-needed equipment. As a result we have been able to significantly decrease the number of animals euthanized.

RAISED
$182,871.31
Super Bowl Raffle

The Super Bowl Raffle is made possible by a partnership between the Community Foundation of San Joaquin and AG Spanos Companies. Since 2008, participants in the raffle have had the opportunity to win Super Bowl tickets among other prizes. At least 90% of the proceeds go to supporting local San Joaquin County charities.

Tickets Sold: 3535
Raised: $395,439

COMMUNITY PHILANTHROPY SUMMIT

The Community Philanthropy Summit is a half-day conference organized by the Community Foundation of San Joaquin and the Lodi Community Foundation. Since 2011, we have provided a yearly forum for donors, charities, estate planners, and community leaders to discuss and collaborate on addressing issues in the county through philanthropy. One of the more notable achievements was the sparking of a community dialogue on homelessness, which blossomed into a county wide task force.
Scholarships

**Ernest & Victoria Gribaudo**
AG SCHOLARSHIP

**Robert & Catherine Lagorio**
VETERINARY SCHOLARSHIP

**Arturo Vera**
ART SCHOLARSHIP

STOCKTON UNIFIED $300

**Jester’s Club**
ATHLETIC SCHOLARSHIP

**Bill Pollard Jr.**
BUSINESS SCHOLARSHIP

**San Joaquin Society for Human Resource Management Scholarship**
BUSINESS SCHOLARSHIP

**Lodi High $5,000**

Lodi High $1,000

Lincoln HS $1,000

Franklin HS $1,000

St. Mary’s HS $1,000

Stagg HS $1,000

Tracy High $1,000

Cesar Chavez $1,000

Edison HS $1,000

San Joaquin Society for Human Resource Management Scholarship $2,000

Any in SJC $2,000

Tokay High $5,000

Any in SJC $2,500

Lodi High $2,000

Lodi High $1,000

Lodi High $1,000

Lodi High $1,000

Any in SJC $1,000

NUMBER OF SCHOLARSHIPS
18

FUNDS AWARDED
$32,800
Philanthropists

IN OUR COMMUNITY

Remembering Alex and Faye Spanos

Alex and Faye Spanos began their life together in 1948, a marriage that would last 70 years. He had fallen in love with Faye when he saw her at church in Tarpon Springs Florida while serving in the US Air Force. That heartfelt and dedicated love never left him throughout their marriage. He liked to say Faye was his “rock and inspiration.” Faye called Alex “the love of my life.”

From his first business venture to feed farm workers in the fertile San Joaquin Valley to eventually becoming a business giant within the construction industry, Alex Spanos was determined to become a success. Along with all that they accomplished, Alex and Faye felt strongly about opening their hearts and home and sharing their good fortune with their large extended families and their community. Once asked why they didn’t move their Stockton business to New York or San Francisco, Alex replied, “Because this is home.”

Guided by their faith, they lived their beliefs every day of their lives and treated everyone with the dignity and respect they deserved. They made donations benefiting schools, children, the arts, hospitals, and people in need, showing their love and care for this community.

They will always be remembered for their generosity and kindness.
Stockton Helps Paradise

Stockton Helps Paradise was a community-lead initiative that demonstrated our area’s concern and support for the victims who sustained profound loss in the Paradise fires. Collectively, local residents, businesses, nonprofits and organizations raised over $100,000 for Stockton Helps Paradise, and The Community Foundation was able to raise nearly $30,000

Community Foundation of San Joaquin

Milestone

We are very pleased to share with you that on September 28, 2018 the Community Foundation of San Joaquin received accreditation with the National Standards for U.S. Community Foundations. This was a multi-year process requiring substantial staff work, and has been one of the largest goals for the Community Foundation to achieve.

The National Standards for U.S. Community Foundations accreditation program represents the Community Foundation’s commitment to go above and beyond federal and state law requirements to demonstrate accountability and excellence to communities, policymakers, and the public.
FUND LIST

Donor Advised Funds
Ambassadors of Peace
Bargoma, Yusuf A. Fund for the Arts
Beattie Family Charitable Fund
Beattie, Joan C. Memorial Fund
Boothroyd, Lorna L. Fund
Brown, Robert & Becki Family Charitable Fund
CB Merchant Services Charitable Fund
Chispita Fund
Cool Cats & Barking Dogs
Davis, Lynne Charitable Fund
De Jong, Kenneth and Margaret Memorial Fund at Ripon Community
Dougherty, Kevin & Julie Family Fund
Duffy, Michael P. Family Fund
Grewal Family Fund
Gribaudo, Ernest & Victoria Family Fund
Human Traffic
Johnson Family Fund
Kavanaugh Family Fund
Leland, Ted & Stefanie Family Fund
Liguri Nel Mondo Charitable Fund
Live 209
Love Ripon Fund
Loy/Funamura Family Fund
Lubensky Cope Family Fund
Mazzuola, Sandra Fund
MoreHeart Fund
Mountain Fund
Nance Strong
Nishka Yudnich Fund
Patmon, Charles Gordon Jr. and Dorothy Norris Perpetual Memorial Fund
Perkins, Paul & Irene Family Fund
Petrick Family Fund
Philip, Lawrence & Linda Family Fund
Pollard, Bill Jr. Scholarship Fund
San Joaquin Society for Human Resource Management
Shalvey, Don & Sue Family Fund
Shoneff, The Louis and Audrey Charitable Fund
Shores, The Family Fund
Stockton Sunrise Rotary Fund
Support Stockton PD
The Robert and Catherine Lagorio Scholarship Fund
The TSH Fund
Vera, John R and Francesca Family Fund

Agency Funds
Alpha Psi
Animal Protection League
ARC San Joaquin
Art Expressions
Aspire Public Schools Fund
Children’s Museum of Stockton
Community Center for the Blind & Visually Impaired
Community Partnership for Families of San Joaquin
Compassion for Animals Fund
Delta College Foundation
Emergency Food Bank of Stockton
Family Resource and Referral Center
First Tee of San Joaquin
Friends Outside
Habitat for Humanity
Hearts of Harvest
Housing Authority of San Joaquin Scholarship Foundation
Kiwanis 3
Kiwanis 4
Kiwanis 5
Kiwanis 6
Kiwanis Club of Stockton Foundation 7
Library and Literacy Foundation of S.J.
McHenry House Tracy Family Shelter
One.TLC School for Homeless Children Foundation
Pixie Woods, Inc
Rainbow School, Inc
San Joaquin County Child Abuse Prevention Council
San Joaquin County Office of Education – Educational Foundation
San Joaquin County Sheriff’s Foundation
San Joaquin General Hospital
San Joaquin Medical Society Scholarship & Loan Fund
Scoop Ministries, Inc
Seeds to the World
Silver Lake Campers Association
St Mary’s Dining Room
Stockton Athletic Hall of Fame
Stockton Athletic Hall of Fame Building Fund
Stockton Athletic Hall of Fame Jester Fund
Stockton Athletic Hall of Fame O’Keefe Scholarship Fund
Stockton Athletic Hall of Fame Scholarship Fund

Stockton Beautiful
Stockton Civic Theatre
Stockton Fund for the Animals
Stockton Shelter for the Homeless
Stockton Unified School District 1852 Foundation
The Foundation for Strong Families and Strong Community
Tracy Learning Center
West Side Pioneers
Women’s Center of San Joaquin County
YMCA of San Joaquin County

Agency Endowed Funds
Assistance League of Stockton Endowment Fund
Boys and Girls Club of Tracy Endowment Fund
CFOSJ Endowment
Grand Foundation Endowment Fund
Hospice of San Joaquin Endowment Fund
Library & Literacy Foundation of SJC Endowed Fund
LOEL Senior Center Endowed Fund
Pixie Woods Inc. Endowment
SAIL
SJ County Child Abuse Prevention Council Endowment

Designated Funds
City of Tracy Community Fund
Community Philanthropy Summit
Jesters Club
Super Bowl Raffle

Fiscal Sponsorships
2nd District Agricultural Association
Casino Night – 1852 Foundation
Coalition for a CSU Stockton Community Connections
Cool Cats & Barking Dogs
Lodi Junior Giants
New Teachers Thriving Fund
Ripon Community Fund Golf Tournament
Stockton Animal Shelter
Support Stockton PD
Tracy Community Homeless Task Force
Wine on the Farm – Lathrop Sunrise Rotary

Field of Interest Funds
Community Health Fund
Ripon Community Fund
Stocker, Brian Matthew Charitable Fund
Stockton Helps Paradise
Stockton Service Corps.
Thank you

Donors and Fund Holders
Board Members
Committee Members
Pillar Society

Photographer Credits
Tim Ulmer
RecordNet.org

Community Foundation of San Joaquin
cfosj.org