TCF Forms Strategic Alliance with IEEP, Dr. John Husing and FACE

Under the new CEO leadership of Paul Granillo at Inland Empire Economic Partnership (IEEP) — and its new Chief Economist, Dr. John Husing — TCF announced the development of a strategic alliance that would greatly increase our foundation's ability to collaborate with key businesses, public agencies/resources, and quality of life/economic development efforts in the two-county region. In addition, TCF will develop, manage and invest IEEP’s foundation funds.

Daniel Foster, President/CEO of The Community Foundation states, “We believe that this partnership with IEEP and Dr. John Husing will help lay the foundation for addressing some of the region’s most pressing needs, challenges, and opportunities of the future. Ultimately, we anticipate that this comprehensive strategic partnership will leverage some of the region’s best ideas, talent, and resources for the betterment of the communities in Riverside and San Bernardino counties.”

“Our alliance with The Community Foundation will help the Inland Empire’s business and public sectors to work together to fill the inequality that exists in accessing grant funds for our region”, says Paul Granillo, IEEP’s President/CEO.

Additionally, the Federation for A Competitive Economy (FACE) educational reform initiative – which The Community Foundation has acted as a founding co-convener – joined the newly restructured IEEP Partnership Board. Momentum and support for the strategic alliance is growing. As a result of the partnership, TCF was centrally involved with the two-day IEEP Quality of Life Summit at CSU San Bernardino in early April that attracted hundreds of the region’s leaders to discuss the important issues impacting the two counties.

“This new IEEP partnership represents the best model for serving the needs of the business and the communities of Riverside and San Bernardino Counties. It is ambitious, but the needs of the Inland Empire make it a necessity,” said Dan Rendler, Chairman of the Board of IEEP and Regional Director of the Gas Company.

Hundreds from Inland Southern California gather to hear IEEP’s Dr. John Husing share the State of the Region.
President Daniel Foster

It can be stated about life, that you are either “getting better” or “getting worse”... there’s no “in between.”

At our Foundation, we are definitely getting better in some very significant ways... such as:

- In the past two years, our total assets have grown from nearly $40 million to $61 million!
- Our investment management and market performance in the past two years has realized a nearly 40% overall increase to all pooled funds (14.4% in 2010 and 25.3% in 2009).
- Our Community Impact Fund (which supports nonprofits in the two-county region) increased by 35% over last year – representing the most grantmaking from our CIF program in our Foundation's history.
- Our operating budget has fully recovered from the financial impact of the 2008 economy and we are now experiencing significant operating revenue growth.
- Our outstanding staff has grown from 8 to 11 employees, and we have expectations of adding more staff later this year. Note: In order to accommodate this growth, TCF will be moving into beautiful and larger offices in downtown Riverside in September (details in our next newsletter).
- Last year’s overall fundraising grew by 50% over the prior year - $5.4 million in 2010 vs. $3.6 million in 2009 (both difficult economic years for fundraising).

The above listing of accomplishments is some of the important indicators of success for our Foundation recently. However, TCF is much more than “numbers”... In addition, we are about improving the quality of life of the two-county region by offering our leadership capabilities as a vital “convener” on important issues and “collaboration builder” to leverage the best ideas, talent, and resources to address regional systemic problem solving.

In this regard, TCF has much to celebrate in recent months. For example, we just formed a key strategic alliance with Inland Empire Economic Partnership (IEEP) and Dr. John Husing, Ph.D., their new chief economist. This partnership will position TCF at the center of the region’s public and private/business sectors – aimed at developing stronger economic development strategies that will improve the quality of life and prosperity for our 4.2 million residents. We believe that this new partnership will better position our Foundation in regards to the important regional issues, particularly as it relates to the development of opportunity for our region.

Additionally, we are the lead organization on developing a Community Indicators Report for both counties in 2011. This multi-year ongoing project will regularly produce reliable and accurate data and statistics on the key quality of life indicators in the region. Of course, these reports will provide vital indicators towards building greater awareness of the key issues; increase dialogue and collaborative solutions with the region’s key stakeholders; and, provide valuable data to improve our region’s ability to attract external funders and report back on the impact for their investments in our region.

Finally, our community leadership initiatives – targeting the fields of nonprofit/philanthropic capacity building, environment, arts & culture, youth philanthropy, and education – are experiencing tremendous growth and new opportunities in development for our region. Please look for the details and updates of these initiatives in our upcoming Annual Report due to be distributed in the next few weeks.

Respectfully,
Daniel Foster, President/CEO
Hail and Farewell

It is with deep appreciation that The Community Foundation (TCF) says goodbye to Jane Carney who diligently served TCF for over 14 years as a partner with the business law firm Roth Carney. Carney has downsized her significant client list this year, so we bid farewell and thank Jane for her years of wisdom, guidance and dedication to the Foundation.

After extensive research by our Counsel Search Committee, a Southern California law firm experienced in guiding the legal operations of community foundations was chosen as TCF’s new legal counsel. We offer a warm welcome to Reynolds T. Cafferata, partner with Rodriguez, Horii, Choi & Cafferata, LLP.

Matt Pim, TCF Board member, served on the ad hoc search committee. “While performing our due diligence, Mr. Cafferata and his firm consistently floated to the top of our list. They have well served numerous community foundations and come highly recommended, and I feel they will not just meet, but exceed, our needs here,” Pim says. “With the addition of RHC&G, our staff will be better equipped to pursue more sophisticated issues at a time of tremendous growth at the Foundation, like real estate gifting opportunities, which require specialized legal expertise.”

Shelley Hoss, President of the Orange County Community Foundation agrees. “Reynolds has been an invaluable resource to the Orange County Community Foundation. His expertise in the charitable arena is beyond compare, and he is always a pleasure to work with. I couldn’t recommend him more highly.”

The Marcus’s Heart Fund

The Community Foundation has 290 charitable funds and even more active donors, each with a different motivation for giving. Sadly, the act of giving is sometimes motivated by a tragedy, as was the case with Bruce and Dana Atlas.

Marcus Atlas was a handsome, athletic young man attending Valley View High School in Moreno Valley. As graduation drew near in 2008, he knew what he wanted to do. As a young teen, he had been a Police Explorer and he was eager to attend the police academy and become an officer. In order to attend the Police Academy, one must be nearly 21 years old, so he decided to enlist in the Army to bridge the gap. He told his parents that those few years would give him some real world experience and pride in serving his country. With his parents’ blessing, he joined the Army in March 2008. “I knew we were at war and as his mom, I didn’t want him to go. But, I was proud of him and I respected his decision,” said Dana Atlas, mother of six, including Marcus.

On November 22, 2009, just two months after Marcus’s unit had arrived in Afghanistan, his vehicle rolled over an IED, Improvised Explosive Device, which took Marcus’s life.

“Almost immediately, we knew we wanted to do something to make sure he is not forgotten,” said Bruce Atlas, Marcus’s father. “Through building the Marcus’s Heart Fund at the Foundation, there will be a legacy left. When we are long gone, his name will be remembered.”

The Atlas Family wanted to work with kids Marcus’s age. “Some kids don’t have the opportunity to go to college, or sometimes it’s something as small as transportation that prevents them from going to college. So, we thought we could use the fund to help with tuition assistance, books or even with a bus pass to get to school,” Bruce said. “Long term, we’d like to be able to give full-ride scholarships to major universities, so it’s a building block to get there.”

Since that tragic day in Afghanistan, the family has held several fundraisers to increase awareness of the Marcus’s Heart Fund. Marcus enjoyed both comedy and music so they have hosted those types of events in his honor. Last fall, they hosted a successful concert at the Fox Theater in Pomona and the second Funky Town Funk Festival is currently in the works.

Bruce and Dana Atlas say their son was “a very loving person, very caring of others.” The Community Foundation is proud to support The Marcus’s Heart Fund which recognizes Marcus’s caring nature and at the same time honors a dedicated soldier and a son.
Over $337,000 in grants were awarded to our regional nonprofits from the 2011 Community Impact Fund. This represents 35% more than 2010 and the most ever in the history of the Fund. Thank you to our generous donors who made it possible.

2011 Community Impact Grants

**Assistance League of Temecula Valley** for free dental care for K-12 uninsured students

**By the Police Activities League for the new Youth Leadership Council**

**Boys & Girls Club of the Hi-Desert** for Project Learn which provides computers and printers for homework and learning programs

**Childhood Cancer Foundation of SoCal** for their Family Support Program

**Community Settlement Assoc.** in Eastern Riv. Co. for computer literacy for the unemployed

**Court Appointed Special Advocates (CASA)** in Indio for a Case Supervisor to oversee volunteer advocates for abused and neglected children

**Friends of the A.K. Smiley Public Library** in Redlands for the Adult Literacy Program

**Health Assessment Resource Center** in Coachella Valley for the development of three specialize reports used to address local health issues

**Home of Neighborly Service** in San Bernardino County to fund the basic needs services for residents

**House of Prayer Gospel Outreach Ministries** in San Bernardino County for their Hope for Heroes Program which provides permanent housing for homeless veterans and/or their families

**Idyllwild Community Recreation Council** for a community-built playground

**Island Congregations United for Change** for organization of Riverside youth to help improve college attendance

**John F. Kennedy Memorial Foundation** in Coachella Valley to purchase books for the literacy program

**Mizell Senior Center** of Palm Springs for the Senior Fall Prevention Program

**Pacific Lifeline** in Upland and Western San Bernardino County for the Women’s Programs that support women in need of basic services and skills in self-sufficiency

**Sativa Clavo, Inc. of Greater San Bernardino** for clothing to homeless, foster and low-income children

**Sativa Rosa Plateau Foundation** in Riverside County for the Children’s Education Program, including curriculum materials, displays and school bus transportation costs

**Stroke Recovery Center in Coachella Valley** for equipment upgrades for recreational therapy computer lab

**San Bernardino Symphony Assoc.** for the Sensational Strings Youth Outreach Project for at-risk and underserved youth

**Al-Shifta Clinic, Inc.** in San Bernardino County for the Care Zenith program which provides medical and dental care to the indigent and uninsured

**Apple Valley Police Community Activity League** for their Youth Enrichment Program including the boxing center program

**Center Against Sexual Assault** in Hemet for a senior safety and sexual assault prevention program

**Making A Difference Ministry, Inc.** in the High Desert for the Healthy Eating and Living Program

**Victor Valley Community Dental Service** in the High Desert for emergency dental care for the homeless and uninsured

**Are of Riverside County** to supplement a full time LVN for the developmentally disabled at the Brockton Resource Center

**Axis Foundation, Inc.** in Riverside County for the Step Up Project which provides at-risk teens and young adults access to online technology to learn financial literacy, entrepreneurial and life skills training

**Diamond Valley Arts Council** in San Jacinto Valley for the Summer Strings Institute which provides music workshops, Master classes and student scholarships

**Fender Museum of the Arts Foundation** for free music instruction for 33 new students for 6 months

**Mission Inn Foundation** in Riverside for the Hands on History program which provides underserved communities access to arts in after-school programs

**Mountaing Communities Boys & Girls Club** in the San Bernardino Mountains for Project Learn, an after-school program

**Music Changing Lives** in Riverside and San Bernardino Counties for equipment for the after-school enrichment program

**San and Alfreda Maloof Foundation for Arts and Crafts** in San Bernardino County for Mi Punto de Vista which enables Hispanic/Latino teens to learn from the Mexican collections in the Maloof Museum

**San Gorgonio Child Care Consortium** for new rubber chips for the playgrounds in the Pass Area

**Today’s Urban Renewal Network, Inc. (TURN)** in Riverside to expand the network of 50 local faith-based groups who are engaged in service to homeless and low-income families through Project Community Connect

**Valley Partnership in Coachella Valley** for AmeriCorps Promote Program which provides matching funds for tutoring for low-performing K-3 students

**Young Visionaries Youth Leadership Academy** in San Bernardino County for the From Pistols 2 Pencils program to assist in developing a media campaign addressing youth violence

**Youth Action Project** in San Bernardino for integrated youth services within the San Bernardino City Unified School District
Representatives from 15 nonprofits serving the Coachella Valley receive grant checks totalling over $67K from The Community Foundation at a ceremony at the Annenberg Center.

Daniel Foster, TCF President/CEO and Steve PonTell, President, La Jolla Institute, are working together to produce Community Indicators Reports for San Bernardino and Riverside Counties.

Attorney Ken Stream addresses the Professional Advisors Committee in San Bernardino.

Cecilia and Jim Cuevas with their daughter, Savannah, award a $1,000 grant to Joan Butters from Suicide Awareness Requires Action (SARA) as part of TCF's Youth Grantmaker Committee program. Savannah served as a youth grantmaker for three years and selected SARA as her “senior charity of choice.”

Dawn Sonnier (R) from the Idyllwild Community Recreation Council accepts her check for a $10,000 grant from TCF. Board Member, Benita Roberts (L) and Celia Cudiamat (C), TCF VP, Grant Programs and Donor Services.

Concha Rivera and Rosalie Silverglaze Anderson, Grants Committee members, are frequent supporters of TCF events and programs.
Local Couple Gives to Claremont CF
Low Yielding Investment Converts to a Triple Benefit

As many of you know, Certificate of Deposits or CDs are producing rates at historic lows. As of the end of April 2011, the average five-year CD yield remained stagnant at 1.71 percent for the ninth week in a row. Why tie up your money in a low yielding investment when you could convert that money into a gift that pays a yield of 5.5 to 8.6% depending on your age, providing you with a significant tax deduction and income for life, and benefits your favorite charity?

Bob and Nancy Weingartner decided to do just that. As long time residents of Claremont, California the couple wanted to support the arts in the region and to assist The Claremont Community Foundation (CCF), an affiliate partner of TCF, with their mission of “Building Community—Creating Our Future.”

“We attended programs presented by the Claremont Community Foundation and heard how we could increase our investment yield,” said Nancy. “We decided it would be silly to not contribute to the community we’ve been so tied to for years.”

With the assistance of Mike Tracey, Vice President of Development at TCF, the Weingartners converted a low-yielding CD into a Charitable Gift Annuity. These annuities are guaranteed contracts with fixed payments, providing the donors with income for life. As an annuitant, they receive the additional benefit of a tax deduction once the gift is funded, as a portion of the gift is immediately tax deductible. When the annuity matures at death, the asset is distributed to the donor’s charity of choice. “We’ve known Mike for a long time,” Nancy said. “He explained everything really well and it just seemed like a good thing to do.”

“The main purpose of giving the money is the benefit to the Claremont Community Foundation, but there is a tax advantage and a small amount of income too. But, it’s a charitable thing,” Bob added.

Being charitable is not uncommon for the Weingartners. Whether it has been contributing to scholarships for performing arts students, being deeply active in the local colleges, volunteering at the Red Cross, serving as a Petterson Museum board member or scheduling bus trips to the L.A. Philharmonic, the Claremont community has benefited from their collective work over many years.

The Community Foundation has partnered with Claremont Community Foundation since 2006. As part of the relationship, TCF provides planned giving services and fund development assistance. “We truly enjoy helping the enthusiastic and dedicated board at CCF in building their funds, especially through planned giving,” said Mike. “The Weingartners are demonstrating wonderful leadership in their support of the Claremont Community Foundation.”

To determine if a Charitable Gift Annuity is right for you, contact Mike Tracey at 951-684-4194 or email mtracey@thecommunityfoundation.net.

New Board Members

Lisa Houston

Serves as President and CEO of FIND Food Bank in the Coachella Valley. She is dedicated to the organization’s mission and embraces collaborative opportunities throughout Riverside County. Originally from British Columbia, Canada, she moved to Southern California in 2001. Houston served on the board of the College of the Desert Foundation for many years.

Pat Spafford

Is a partner with the CPA firm Powell & Spafford, LLP in San Bernardino. He currently serves on the Peer Review Committee for the California Society of Certified Public Accountants. As part of Pat’s community service, he has served as treasurer for numerous Boards, including San Bernardino Sunrise Rotary, Arrowhead United Way, A Special Place, Easter Seals of the Inland Counties and the Association for Retarded Citizens of San Bernardino. He also coaches adults with special needs for the Greater San Bernardino Special Olympics.

New Staff Members

Sharilyn Hunke

Comes to TCF as our Communications Officer from the credit union industry where she directed the marketing function for over 12 years. She serves on numerous Boards, including Raincross Exchange Club and Citizens University Committee at UCR.

Kris Kirkpatrick

Joins TCF as the Asst. to the President and Admin. Services Mgr. She comes with a strong corporate background from Altura Credit Union where she worked as the Marketing Manager. She is a Riverside native with a strong community and nonprofit volunteer background.

Beatriz Ralda

Joined TCF in November 2010 as our Administrative & Accounting Assistant. She joins us with a recent degree from Cal State San Bernardino where she completed her internship at the American Lung Association doing research, advocacy, and education throughout the community.
A Call For All Leaders

TCF Launches Environmental Leadership Academy and Certificate Program

In 2009, The Community Foundation gathered over 150 environmental stakeholders throughout our two-county region to solicit their input on current and future conservation needs. They identified the most pressing environmental issues in the region.

San Diego State University Santa Margarita Ecological Reserve, TCF will be launching the first Environmental Leadership Academy and Certificate Program (ELAC) this fall.

“Bank of America recognizes the critical importance of addressing our environmental needs. Exposing community leaders to information about a sustainable environment will definitely have a positive impact on the quality of life in our region,” states Al Arghiello, Bank of America’s Inland Empire Market President.

The Environmental Leadership Academy and Certificate program addresses the vital need for regional leaders to prepare for the massive growth and development forecasted in the next several decades. The ELAC program will give our leaders a strong and balanced set of environmental tools to assist in making sound, well-informed decisions and help create critical and prudent policies that will make our two-county area a national model for sustainability, economic vitality and environmental stewardship.

Each two-day session (Thurs. at 1pm to Fri. at 6pm) will be located at a different location to expose participants to varying environments.

Sept. 15-16, 2011 – Blue Sky Meadows Science Institute, Big Bear: Items to discuss include Biodiversity, Conservation Ecology, Environmental Law, Santa Ana Watershed & Ecosystem Restoration

Oct. 27-28, 2011 – Santa Margarita Ecological Reserve, Temecula: Items to be discussed include Leadership, Ethics, Economics & History, Cultural Resources, Geology & Seismography, Water Quality, & Water Law


May 17-18, 2012 – Crestmore Manor, Rancho Jurupa County Park, Riverside: Items to discuss include Air Quality, Waste Management, Urban Farming, Redevelopment, Landuse Planning, & Transport of the Future

“Our hope is that our ELAC program will help train, enrich and enlighten key decision makers and policy makers through a comprehensive, holistic, 3-D approach,” says Mike Tracey. “Eventually, after many sessions, hundreds of graduates will be in a position to take a more well-rounded view of the environment and understand a more balanced and sustainable approach to growth in the Inland Empire region.” He continues, “I foresee our region becoming a national model for future growth and environmental stewardship.”

If you are an elected official, policy maker, decision maker, business leader, planner, educator or interested in learning more about sustainable environment practices, consider the Environmental Leadership Academy and Certificate program. Your $399 fee includes all meals, snacks, Thursday night lodging at Blue Sky Meadows and all field trip transportation. Please call 760-750-8730 for more information.
Redlands Adult Literacy Receives Grant

The Redlands Adult Literacy Program has been awarded a 2011 Community Impact Fund Grant which will be used to develop an adult literacy computer lab at A. K. Smiley Public Library, expand public outreach to adult learners in the Redlands community, and enhance the adult literacy tutor training program.

The Redlands Adult Literacy Program is sponsored by the Friends of A. K. Smiley Public Library (Friends), a nonprofit organization that supports A. K. Smiley Public Library.

Friends President Jerry Burgess accepted the $9,534 grant award on behalf of the Redlands Adult Literacy Program at a Community Foundation grantee reception held in June at the San Bernardino County Museum.