



2022

Report to the Community
Living Life Together in Santa Cruz County

S COMMUNITY FOUNDATION
SANTA CRUZ COUNTY

In memoriam



Photo: Chris Schmauch

Diane Porter Cooley at her home, 2012

Community Foundation Honorary Trustee

Diane Porter Cooley

October 15, 1928 – March 11, 2022

With her wild wit, ferocious passion, and deep knowledge, Diane modeled for us how to preserve the land we cherish and strengthen who we are as a community. Thanks to Diane and her rallying support, our county has a Land Trust, the Elkhorn Slough Foundation, Salud Para la Gente, Pajaro Valley Shelter Services, the Community Foundation, and so many other organizations and initiatives that care for Santa Cruz County.

FRONT COVER PHOTOS:

Clockwise:

Esabella Bonner, Black Surf Club & Angela Chambers, Tannery World Dance & Cultural Center (credit: K. Painchaud)
Laura Marcus, Dientes & Leslie Conner, Santa Cruz Community Health (credit: K. Painchaud)
Omar, Adrian, and Alexis, Aztecas Youth Soccer Academy participants
Scholarship recipient Danna Perez (credit: K. Painchaud)
Young gardeners with Life Lab
Dr. Carmin Powell, center, with colleagues from Watsonville Community Hospital

Caring for Each Other

Thanks to you, our 40th anniversary year was one of tremendous progress. Together, we took on issues that are too big for any individual to solve alone. Our community now owns Watsonville Community Hospital. Veterans are housed at Veterans Village. The Amah Mutsun Land Trust purchased its first piece of land. Children, families, and seniors have support to recover from the pandemic. Habitat for Humanity families have the keys to their new homes. **We're honored to be part of this good work as we celebrate 2022's record breaking \$32 million in grants and scholarships.**

None of this would be possible without the generous people who built the foundation on which we stand today. Our founders saw a devastated community rallying to rebuild after the floods of 1982. Today we are a trusted partner to people interested in improving the lives of others and strengthening this special place. Anybody interested in doing good has a place at our table. Together, we can make Santa Cruz County a place where all can thrive.



Susan True
CEO

Julie Haff
Board President

Mission

We bring together people, ideas, and resources to inspire philanthropy and accomplish great things.

Vision

To make Santa Cruz County thrive for all who call it home, now and in the future.



Community is about living life together. It's about getting through hard times, floods, and fire; camping with girl scouts; serving meals and building clinics; helping kids and planting trees."

– Diane Porter Cooley

Living Life Together...in Joy, Learning & Action

In 2022, we joyfully reconnected after nearly two years apart. Our community events and programs were informed by the challenges we've faced together since 2020—inequities of the pandemic, calls for racial justice, enduring housing shortage, climate change and wildfires, business closures, and more. We came back together both virtually and in-person, to deepen our understanding of community issues and racial equity, build trust among each other, and increase awareness of local opportunities for giving and action.

Giving in Action

Community members stepped up big, using donor-advised funds that offer an easy and tax-wise way to give. Our donors awarded a record

\$19.6 MILLION

for community needs in 2022, a 53% increase over 2021 and well above national benchmarks for donor-advised fund annual giving.



Clockwise: Rise Together member Jorge Savala with family at the public Rise Together Celebration. Lora Lee Martin & Janis O'Driscoll learning at On the Table. Jessica Evangelista, Arts Council Santa Cruz County; Ruby Vásquez, Estrellas de Esperanza; and Valéria Miranda, Pajaro Valley Arts celebrating Dia de los Muertos. Eileen Hill, Cabrillo College Foundation & Keith Collins, Veterans Village of Santa Cruz County at a nonprofit gathering.



The Foundation's events bring people together creatively, dynamically, and inclusively. On the Table brought many perspectives and life experiences into focus, enriching us all in a fundamental way. The Rise Together celebration introduced me to organizations that have helped me build connections in my community work and service.

– Katy Stonebloom, Donor-Advised Fundholder

Launching Lasting Solutions

Amber Julien, Luke Politte, and their son Leo with the keys to their new home in the Habitat for Humanity Rodeo Creek Court development. The family, displaced by the CZU fires from their rented home, were living in an RV parked on a family member's property. Now these two public school educators finally feel they can put down roots and stay in Santa Cruz County.

Photo: Jessalyn Rego

Challenges like our affordable housing crisis call for creative and durable solutions. Our blend of tools like cost-effective loans, grants awarded by our board, and combined donor giving, connects capital to projects addressing critical needs. With our partners, we created new housing solutions for veterans, people exiting shelters, educators seeking a home of their own, and differently abled young adults building independent living skills.

Making an impact

Our funds kickstart solutions, inspire local donors to give, and help attract dollars from public and private sources for community benefit.

Our investment of

\$10.7 MILLION

in loans helped inspire

\$9 MILLION

from community members and attracted

\$33.5 MILLION

in public funding towards progress on projects including Watsonville Community Hospital, Veterans Village, Habitat for Humanity, Housing Matters, and Community Alliance for Lifelong Independence.



Funding affordable housing is much more complex than traditional construction financing. Low-interest loans are instrumental in filling the funding gaps. The Foundation's loan for our 801 River Street project was pivotal in bringing seven units of permanent supportive housing online."

– Phil Kramer, CEO, Housing Matters Santa Cruz

Healing Together

During the pandemic and CZU fires, our community cared for each other in remarkable ways—making sure neighbors stayed safe and could access sources of aid. Two years later, families coping with COVID-worsened poverty are getting connected to financial assistance, legal aid, and landlord tenant mediation with help from our Greatest Needs Fund and key partners. Our Fire Recovery Fund and a coalition of disaster response organizations are there for fire survivors facing complex and painstaking rebuilding efforts. We continue to make Unmet Needs grants to help fill funding gaps that would otherwise make rebuilding impossible.

Helping Folks on the Road Home

\$3.5 MILLION
from the Fire Recovery Fund
including

\$2.5 MILLION
to fund gaps in rebuilding and
relocating.



Beatrice has been working to rebuild her home of 30 years that was completely lost in the CZU fire. Fire Recovery funds were used for two phases of the rebuild: installation of new potable water system pipes and installation and finish work on a manufactured home that she was able to purchase through her limited insurance funds. Beatrice hopes to move into her new home in the early part of 2023.

I was so worried about not being able to complete my rebuilding project. But thanks to the ongoing support of Mountain Community Resources and my Unmet Needs grant from the Community Foundation, a huge boulder has been lifted off my shoulders. My heart is singing, and I have hope again.”

- Beatrice Easter, CZU Survivor



Photo: Devi Pride Photography

Rising Together

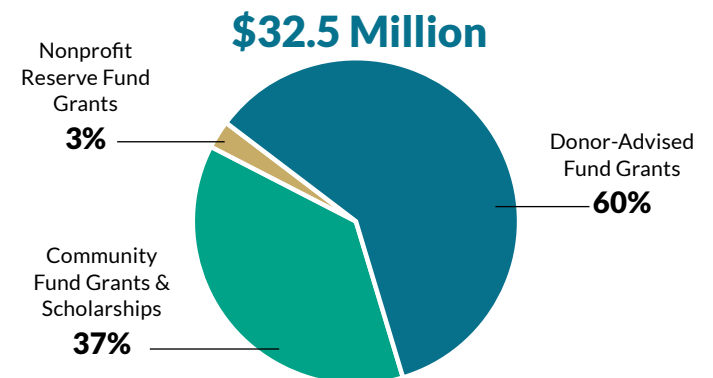
The Rise Together coalition at a gathering celebrating \$400,000 in collaboratively decided grants to advance racial equity locally.

When everyone has what they need to thrive, we all benefit. That core belief is what our Community Grants program and our Rise Together initiative are all about. Rise Together is a coalition of 32 Black, Indigenous, and People of Color leaders and a team from the Community Foundation. It is also a fund for racial equity that is supported by community members from all walks of life.

I am grateful for Rise Together investing in me, my leadership, and my organization's capacity to foster more joy, peace, and mutual respect across hearts, homes, and communities. The grant supports our agency's effectiveness and my growth as a transformational leader."

– Stephanie Barrón Lu, Executive Director,
Positive Discipline Community Resources

2022 Grants by Type



In 2022, our biggest grants included the pooling of community funds to benefit the Amah Mutsun Land Trust, Watsonville Community Hospital, new healthcare and dental clinics in Live Oak, Freedom Elementary Soccer Field, and Starlight Elementary's teaching kitchen and garden.

Changing the Future Today

We love helping people give with confidence and make a difference—today, and for many years to come. We're proud to be a place where charitable giving becomes local, personal, and meaningful. Together, we can get big things done today.



Who We Help

Individuals, families, businesses, and nonprofits to make a lasting impact in our community and beyond.



What You Can Give

Tax-wise gifts can be donations of cash, securities, real estate assets, retirement funds, insurance, and planned gifts.



What We Offer

An opportunity to give to community funds to address urgent needs. Giving options also include donor-advised funds, endowed funds, scholarships, funds for nonprofits, charitable remainder trusts, or legacy plans.



The Difference We Make

We bring relationships and an in-depth understanding of the issues, opportunities, nonprofits, and resources that shape Santa Cruz County.

Plan for Future Giving

A Memorandum of Charitable Intent is an easy and flexible tool we offer to create and direct planned gifts through your will, living trust, or beneficiary designation. Contact the team for more information. We are here to help!



Penny Rich is pictured with three awardees of the Isabel Fowler Sewell Scholarship, named in honor of her mother. Awards go to first generation college students. L to R: Ariana Ramirez-Chavez, Cynthia Lopez-Fernandez, Penny, and Jesus Angel Avalos-Regalado. Over our four decades, the Community Foundation has awarded scholarships to over 400 students.

I work with the Foundation because I want my donations to be part of the community where I live. The staff is personable, down-to-earth, and accessible—helping me give through my Donor-Advised Fund with ease and confidence. And, I'd always had the dream of funding a scholarship to create more lasting change. The Community Foundation helped make that possible."

– Penny Rich, Donor-Advised Fundholder & Scholarship Donor

Join us

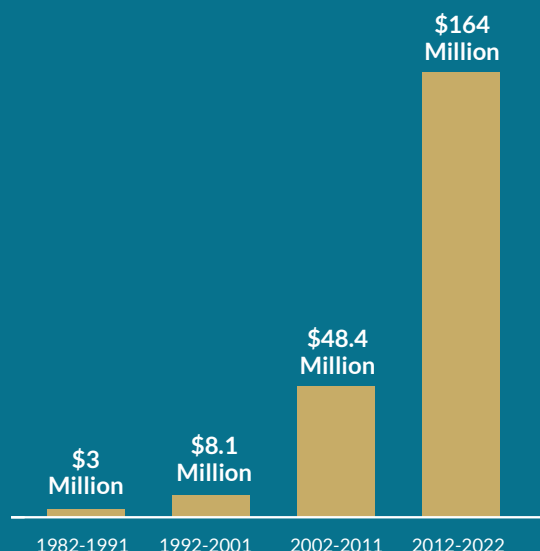
Learn more about how to give to your passions, leave a legacy, and deepen your investment in community-led change.

The Community Foundation takes their fiduciary responsibility seriously by strengthening local nonprofits and those they serve. The Foundation actively brings together different parts of our community, sees the big picture, and acts strategically.”

– Rachel Wedeen,
Certified Financial Planner,
Morgan Stanley

Growing Good Together, Since 1982

Grants & Scholarships
\$223.5 Million Over 40 Years



Financial Highlights

Fiscal year ending December 31, 2021

Assets

Cash and cash equivalents.....	\$4,299,259
Investments	\$185,269,717
Charitable trust assets	\$2,497,476
Grants and other accounts receivable	\$670,550
Loans receivable - CIRF	\$2,650,000
Loan interest receivable.....	\$14,468
Deposits and prepaid expenses	\$34,402
Fixed assets, net	\$6,814,639

TOTAL ASSETS..... \$202,250,511

Liabilities

Accounts payable and other liabilities	\$903,711
Grants payable	\$1,603,775
Agency funds	\$19,872,020
Charitable trust liabilities	\$870,875
Charitable gift annuity liability	\$697,279
Notes payable, net of unamortized debt issuance costs ...	\$907,529

TOTAL LIABILITIES 24,855,190

NET ASSETS

Without donor restrictions	10,117,078
With donor restrictions.....	167,278,243

TOTAL NET ASSETS 177,395,321

TOTAL LIABILITIES AND NET ASSETS..... \$202,250,511

Our 2022 audit will be posted once prepared in 2023. View our financials and investment performance at cfsc.org/financials.

Board Leadership 2022

OFFICERS

Julie Haff
President

Trevor Strudley, CFP
Vice President

Chris Murphy
Secretary

Jim Weisenstein
Treasurer

TRUSTEES

Gina Castañeda, MariaElena De La Garza,
Liliana Diaz, Esq., David Doolin, CPA, Larry Donatoni,
Doug Fischer, Judy Franich, Janet Heien, Rogelio Ponce Jr.,
Sandy Skees, Kirk Schmidt, Esq.,

S COMMUNITY FOUNDATION
SANTA CRUZ COUNTY
cfsc.org | 831.662.2000