Now. Here. This.

2012 ANNUAL REPORT
The Fresno Regional Foundation is gaining momentum as we work with donors to create sustainable, high impact, positive change in our community—we call this the New Era in Philanthropy. We are excited to share stories about donors, community benefit organizations, and projects that are providing pathways for all our residents to live productive, enriched lives.

Issues in the San Joaquin Valley are deep, systemic, and complex. They require creative, long-term solutions. Our 2012 early education grants may not produce visible results for a decade. Still, our long-term vision keeps us on course. It is the daily, weekly, monthly, and yearly incremental steps that compound to produce sustainable change. The title of this report is a reminder to start right now, from where you are, and with this opportunity to partner with us.

*Now. Here. This.*

In the pages that follow, you will read stories of donors who are giving now. We will share the work of a committee determined to have the greatest impact on critical issues right here in the San Joaquin Valley. And we will describe this opportunity for donors to work through Fresno Regional Foundation for informed, strategic grantmaking tailored for this community.

With the leadership of our active and dynamic Board of Directors, a knowledgeable Staff, and dozens of volunteer advisors, we are more dedicated and well informed than ever. We have a long-range strategic plan that builds upon past accomplishments while keeping our vision set on the long-term legacy of the Valley.

Fresno Regional Foundation is your partner to make your philanthropic legacy a source of pride for you and future generations. We hope the pages that follow inspire you to join us in improving the quality of life for the San Joaquin Valley.

Dan DeSantis  
Carole Andersen  
Dewey Slater  
Chief Executive Officer  
Board Chair, 2013  
Board Chair, 2011–2012
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BACK COVER  Meet our Board of Directors and Staff
Adopt a School Scholarship Fund

Francine and Murray Farber not only thought about the kids from one of Fresno’s most needy schools, they did something for them. With an initial gift of $1,000,000, the Farbers and their daughter-in-law established the Steve’s Scholars Program in memory of their son, Steven Farber, who died unexpectedly in 2001. The Farbers have adopted Tehipite Middle School in downtown Fresno. Steve’s Scholars will provide funds toward college tuition to every Tehipite student who completes the requirements of attendance, academics, community service, and graduates from a Fresno Unified high school.

The first class of graduates who came from Tehipite will be in 2018. The original gift of $1 million from Steve’s estate can grow through the Foundation’s well-balanced investment pool so that by the time the first awards are paid, the fund has the potential to increase substantially. The scholarships will be awarded from the earnings of the fund, and FRF will protect the principal so the fund will forever honor the memory of Steven Farber and help make college a reality for Tehipite students.

Murray and Francine recognize that the Steve’s Scholars Program builds on all the other efforts of the school district and community organizations. And they know that this is just one school. Murray Farber challenged, “Tehipite has definite needs, but there are needs all over. I hope this becomes a model for others.”

Corporate Philanthropy

Wanting to be a good corporate citizen, Sebastian started working with their employees to give back to the communities they serve. As the Central Valley’s premier provider of quality communication and information technology services, they soon realized they needed help with effective philanthropy. In 2012, Sebastian established two funds within Fresno Regional Foundation, the Katey’s Kids Sebastian Foundation Fund and the Katey’s Kids Scholarship Fund. Barbara Douglas, Administrator at Sebastian, says, “FRF gave us everything we needed to function as a non-profit, but without all the headaches.” Now Fresno Regional Foundation provides tax deductibility to donors, distributes grants and scholarships, and takes care of all the administrative and investment oversight.
Imagine the San Joaquin Valley with everyone reaching his or her potential. Then act on that vision now to make it a reality.

Francine Farber, Donor

Katey’s Kids was established to honor the life and legacy of Kathleen Ball Sebastian. Katey devoted her life to the improvement of the children in her community through literacy, education, and community development. Sebastian, along with employees, vendors, and even an annual golf tournament, add donations to grow the Katey’s Kids Fund.

The Katey’s Kids Scholarship Fund awards scholarships each year to local Valley students. The recipients are required to maintain a high GPA and demonstrate good citizenship through extracurricular activities and community service. Sebastian has demonstrated responsible corporate citizenship by assisting Valley students with tuition.

Sebastian is passionate about providing literacy opportunities for at-risk children, and so a natural fit was a grant to Exceptional Parents Unlimited for their ‘growing young readers and therapeutic play programs.’

FRF staff reviews all grantees, verifies their IRS charity standing, and monitors grant projects through reporting and site visits.

Eaton Gibson Family

Establishing a fund is easy. It only involves the initial gift and a signed Fund Agreement.

Gifts are immediately tax deductible, even if grants are not made until years later.

Several years ago, Joan Eaton and Paul Gibson established the Eaton Gibson Family Donor Advised Fund. They make one gift into their Fund each year and receive just one tax-deductible receipt each year. Then all year long Joan and Paul recommend grants to their favorite local charities. FRF Program Officers verify the good standing of the organizations they want to support, and issue the grant checks to those organizations. FRF handles all of the reporting and correspondence with the organizations. Joan and Paul are sent a quarterly fund statement showing the activity in their fund. They say, “This fund has worked very well for us. It is like having a private foundation but without the high expense and inconvenience.” FRF has assisted with over 40 grants from their Donor Advised Fund.

For donors wanting to stay involved and direct their contributions, a Donor Advised Fund is a great option. Donors have access to the expertise of the entire FRF staff. FRF invests the amount held in the donor advised fund so it can grow through interest, dividends, and market return making even more available to grant out into the community.
Inspired by a $3 million grant from The James Irvine Foundation, local donors are building a permanent endowment of $20 million that will make $1 million in grants each year, forever, to have the highest impact on the San Joaquin Valley’s most pressing social issues.

**The Benefits**

The FUND allows donors to be well-informed and strategically focus their charitable giving to deeply and permanently benefit our community for generations.

The FUND allows donors to capitalize on the expertise of Fresno Regional Foundation and an expert committee of community members.

The FUND helps donors be forward-thinking, long-term philanthropists recognized for investing in the transformation of the San Joaquin Valley.

**Current Funding Focus:**

Helping Children Succeed by Third Grade—The Pathway Out of Poverty

$600,000 granted to fill the gaps and expand successful programs to make a stronger support system for youth.

**The Process**

An Advisory Committee of 12 community leaders spent months during 2012 debating the complicated maze of social issues in the Valley. Their conversation kept coming back to the critical period leading up to the third grade. Why? At 3rd grade children must transition from learning to read to reading to learn. For children in poverty, once they are behind at third grade, research shows that their future school performance falls off even faster. By insuring that all Valley children are on track to succeed in school by third grade, we are providing them the best pathway out of poverty. The new 2013 Advisory Committee is improving on the 2012 grantmaking by overseeing the progress made toward 3rd grade literacy, evaluating the goals to accomplish, and refining selection criteria for 2013 grantmaking.
High Impact grants connected organizations, aligned services, and filled gaps. The Advisory Committee called this the “glue.” Scores of organizations and educational providers were bolstered by the 2012 high impact grants.

“The Impact

Here in the San Joaquin Valley, there are many initiatives underway to prepare Valley children for success. Fresno Regional Foundation is providing the glue to connect these efforts in order to have a greater collective impact. Instead of creating new, stand-alone, or overlapping programs, our best investment is to help organizations connect with each other, align existing services, and fill gaps in school readiness efforts.

“"Yes, I know that there are problems here in the Valley. But the solutions are also here; they are with us.”

Marla Hartman, Board Member

Mobilize all efforts for collective impact—preparing every child for success by third grade

Expand efforts for English language learners to be on track by 3rd grade

Boost rural community school district literacy efforts

Target specific, struggling neighborhoods to overcome learning barriers

Address environmental health issues to improve learning outcomes

Connect and involve parents all along the way

Helping Children Transition from 'Learning to Read' to 'Reading to Learn'
Competitive Grant Cycles tailored for this community

Fresno Regional Foundation serves a dynamic region and multi-cultural population. Our expert staff and engaged Grants Committees understand this. They customize goals for each of the funding cycles. Annually, the Goals to Fund are reviewed, and changes are made based on the varying needs of the community. Below is a summary of the Goals to Fund and the competitive grant cycles in 2012.

**Arts and Culture**

$120,000 awarded to 9 organizations to:
- Integrate culturally relevant arts and cultural activities
- Increase awareness and participation in all arts activities
- Invest in organizational strategies for sustainability

**Youth**

$123,000 awarded to 8 organizations to:
- Address the social, educational, and health challenges that impact youth in the community
- Empower youth to enhance neighborhood safety in low-income communities and communities of color
- Promote youth civic engagement and service learning in the community

**Human Services**

$130,000 awarded to 6 organizations to:
- Invest in capacity-building strategies that focus on board governance, leadership, and fiscal management
- Prioritize activities that support and align with existing community initiatives
- Prioritize organizations serving unincorporated communities and low-income and/or communities of color

**Environment**

(funding made possible through a Donor Advised Fund)

$64,800 awarded to 4 organizations to:
- Acquire land for river restoration
- Restore native fish (particularly salmon) and increase water flows
- Support public access to the Valley portions of the rivers
- Prioritize organizations collaborating with others who are doing related work
- Support programs that trigger matching dollars or additional resources

See our website for a complete list of organizations funded in each grant cycle.

Funding for 2012 competitive grant cycles made possible by: the Estate of James McClatchy, Berven Charitable Fund, Arts to Zoo Fund, the Dorothy S. Mitsuoka Fund for the Dinuba and Reedley area, the Hearst Endowment for Arts, Science, and Education, The FRF Board Fund for the Common Good, and Anonymous Donors.
Donor Advised Funds—Donors stay involved to respond to community needs.

In 2012, Donor Advised Funds awarded 333 grants to 196 organizations, a total of $2 million dollars to support the areas important to the San Joaquin Valley.

Donor Advised 2012 Activity

58 DONOR ADVISED FUNDS: TOTAL VALUE $8.4 million

GIFTS INTO DONOR ADVISED FUNDS $3.3 million

GRANTS AWARDED: DONOR ADVISED FUNDS $2 million

INVESTMENT EARNINGS ADDED $785,000

Donors have access to the expertise of the nine staff members at Fresno Regional Foundation. In 2012, Charise Hansen, Program Officer for Donor Advised Funds, joined the Foundation to offer specialized services to donors with Donor Advised Funds.

Peter Bennett tours the El Dorado Park neighborhood to see first-hand the results of grants from his Donor Advised Fund. Peter relies on FRF to inform him about opportunities to make a difference in people’s lives. PHOTO: THE FRESNO BEE

Amount Requested vs. Amount Awarded

Donor Advised Funds granted $2 million in 2012

“...This community does not reflect the circumstances in the rest of California. To have the best chance of success, efforts in the San Joaquin Valley must include local institutions with local knowledge and relationships.”

Peter Belden, Program Officer
The William and Flora Hewlett Foundation

Youth Grant award of $25,000 to Community Services & Employment Training for their Tech Connect program in Culter/Orosi.

Human Services Grant award of $25,000 to Street Saints for their leadership and board governance training of six organizations serving West Fresno.

Environmental Grant award of $25,000 to San Joaquin River Stewardship for their Summer Youth Connection Program involving 360 youth to explore the San Joaquin River.

Peter Bennett tours the El Dorado Park neighborhood to see first-hand the results of grants from his Donor Advised Fund. Peter relies on FRF to inform him about opportunities to make a difference in people’s lives. PHOTO: THE FRESNO BEE

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In 2007, The William and Flora Hewlett Foundation turned to FRF for expertise to advance Teen Pregnancy Prevention efforts in the San Joaquin Valley. Over the past 5 years, FRF has regranted $1,362,606, which has impacted the lives of over 30,000 teens and families in Fresno, Madera, and Tulare counties.

For nine years, Angie Cisneros served the Central San Joaquin Valley through her work on our Board of Directors. Appointed to the Board in 2004, Angie was the sole 2012 Board Member here prior to our Rebirth in 2005. Angie served three terms as a tireless leader, a continuous learner, and an advocate for the Valley.

Angie dedicated countless hours leading the FRF grants committee through dozens of grant cycles including: reviews of nearly 1,000 applications, site visits throughout the Valley, recommendations to our Board, and post-grant analyses. Angie helped champion our competitive grantmaking process that has grown to award over one million dollars a year. Dan DeSantis, CEO, said, “Angie is genuine, humble, hard-working, and strong. She has been an outstanding role model, a respected Valley representative, and a trail blazer in this community.”

Angie, who worked in the agricultural fields of our Valley as a youth, adopted the principles taught by her grandmothers — share with those less fortunate and work is rewarded with advancements in life. Along with completing her Masters in Social Work at CSU, Fresno, Angie served with many volunteer groups and has often been recognized for her outstanding contributions. The Fresno Regional Foundation is honored by Angie’s service, and we are grateful that she shared her expertise, passion, and devotion with us. We wish her well as she continues to volunteer, travel, and play golf.

Who FRF has funded to carry out this work
- Boys & Girls Clubs of Fresno County
- Boys & Girls Clubs of the Sequoias
- California Health Collaborative
- Focus Forward
- Fresno Barrios Unidos
- The Latino Commission
- Madera County Public Health Department
- Radio Bilingüe

How FRF and its partners are addressing the issue
- Reproductive health education and services
- Leadership development
- Youth mentors
- Access to services
- Reducing risk factors
- Youth empowerment
- Restoring cultural identity
- Family strengthening
- Parent involvement
- Linking organizations

What’s next in FRF’s Teen Pregnancy Prevention efforts?
- The California Wellness Foundation joining FRF to advance the work in 2013.
- FRF convening all organizations working on TPP in the SJV.
- SJV continuing to gain national attention on TPP efforts.
- FRF evaluating current TPP efforts, fine-tuning, and expanding.
- FRF continuing the work in 2013 by granting $382,500. 
Growth in the New Decade

Donors make the work possible

FRF work is made possible by our donors, whether giving to a Donor Advised Fund, giving to a Designated Fund, or giving to a responsive endowment fund like The FUND for the San Joaquin Valley. Thank you to the 475 donors who added $20 million to our work in this new decade. And thank you to the donors and bequest gifts that added $2.2 million to our permanently endowed funds.

Fiduciary responsibility, community leadership, and efficiency

Fresno Regional Foundation is charged with protecting the philanthropic legacies of our donors, and we have been doing this for nearly 50 years. We plan to be here forever — so you can be confident that your giving, whether now or through your bequest legacy gifts, will fulfill your charitable intentions forever. We invest the time and talent of our Board and Staff to advance issues affecting the San Joaquin Valley. And we practice efficiency in order to keep our operating costs well under 2% of our assets — which ranks lowest among community foundations.

Invested assets include our SEI long-term investment pool of $26 million with returns of 13.2% in 2012 and 8.7% over the last three years. A short-term pool of $4 million returned 2.4%. FRF offers donors a choice of long-term and short-term investment options. Investment performance reports and FRF investment policies are available upon request.

FRF is committed to expanding grantmaking, donor development, and community partnerships throughout all the counties we serve. In 2012, FRF awarded a record number of grants outside of Fresno County.

Fresno Regional Foundation manages 200 separate funds.

We welcome the new funds established in 2012.

Donor Advised Funds
- Hal, Debora, and Gracie Bolen Charitable Fund
- R. Emeterio & B. Desiree Castro Family Fund
- Steven Farber Family Fund
- Ken and Carol Fransen Charitable Fund
- Katey’s Kids. A Sebastian Foundation
- Steve and Lori Lum Fund
- Pam and Dale Melville Family Fund
- Pinnacle Donor Advised Fund — Anonymous Donor
- Slater Family Donor Advised Fund
- Dan Souza Family Fund

Designated Funds
- Central CA Environmental Justice Network
- Economic Summit for the San Joaquin Valley
- Friends of the Library — Caruthers, Clovis, Fowler, Kingsburg, Reedley, Sanger, and Woodward Park Branches
- Fresno Stewardship Initiative
- Mental Health in Fresno County Fund
- San Joaquin River Restoration Project
- San Joaquin Valley Town Hall Funds
- Soroptimist International of Madera Fund
- The California Wellness Fund for Teen Pregnancy Prevention

For a complete list of funds, please visit our website.
Staff
Dan DeSantis, Chief Executive Officer
Lori Clanton, Director of Administration
Sharon Sanchez, Finance Manager
Sandra Flores, Sr. Program Officer
Natalie Garcia, Program Officer
Charise Hansen, Program Officer for Donors
Sarah Soberal, Foundation Support for Programs
Michelle Murphy, Foundation Support Specialist

Board Members, 2012
Carole Andersen, CPA, Deloitte
Desa C. Belyea, Retired Assistant Managing Editor, The Fresno Bee
Angie Cisneros, MSW, Retired, California State University, Fresno
Joan Eaton, Co-Chairman, Guarantee Corporations
James Hallowell, Retired, Owner, Hallowell Chevrolet
Marla Hartman, Tulare County Business Leader, Community Advocate
Lydia Herrera-Mata, M.D., Family Medicine, Assistant Clinical Professor, UCSF Fresno
Honorable Brad Hill, Presiding Justice, Fifth District Court of Appeal
Jeanette Ishii, Sr. Government Relations Representative, PG&E
Tim Rios, Sr. Vice President of Community Development, Wells Fargo
Honorable Armando Rodriguez, Retired Judge, California Superior Court, Fresno
Louis “Dewey” Slater, Co-Owner, Sanders and Slater Furniture
Ray C. Steele Jr., Retired Publisher, The Fresno Bee
Mariam Stepanian, President/General Manager, Valley Public Radio
Allysunn Walker-Williams, MPH, MBA, Principal, The Walker-Williams Group, LLC

New Board Members in 2013
Carol Chandler, Chandler Farms, LP
Celia Maldonado Arroyo, M.A., Retired Associate Dean, College of the Sequoias
Rich Olsson, Semi-Retired, Wells Fargo

Emeriti Board Members
William M. Lyles, Business Owner, Lyles Diversified, Inc.
Chris Rogers, Retired
Morton G. Rosenstein, M.D., Retired, OB/GYN
O. James Woodward III, Attorney, Baker Manock & Jensen

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