Strategy for a Stronger Future
ANNUAL REPORT 2019
"Self-awareness is probably the most important step towards being a champion.

—Billie Jean King, an American former number one professional tennis player.
“Self-awareness is probably the most important step towards being a champion.” Those words from Billie Jean King, winner of 39 Grand Slam tennis titles, speak to us of our own path to ever greater accomplishments.

The staff, Trustees, and many partners of the Santa Barbara Foundation underwent an exhaustive 18-month process to look hard at who we are and how we show up as the largest community foundation on California’s central coast. The emergent strategy directed our attention to the county’s most vulnerable populations, working families, the social sector, and you.

October of 2018 marked the start of implementation, with the belief that a well-planned, well-executed strategy would build a stronger future for Santa Barbara County. In 2019, we set to work focusing our support for vulnerable populations in Behavioral Health, Health Care, Food, and Shelter and Safety. Although these areas previously made up our Core Support for Basic Needs program, we made adjustments which allowed for a more equitable application process for agencies applying through our grant programs. We began further research to provide relief for working families. Child Care falls under this category and has long been a staple of our work. Workforce Development and Housing also became a priority, and we continue to research how we can support our community in this area.

In 2019, we launched our Collaboration for Social Impact, bringing additional services to our nonprofit sector and the people who work so hard on the front lines for our most vulnerable communities. This launch also included the first Santa Barbara County Leadership Awards, to honor individuals who have gone above and beyond in their service working at a nonprofit. Our Visionary Leader Award went to Maricela Morales, Executive Director of Central Coast Alliance United for A Sustainable Economy (CAUSE), as she does crucial work in our communities, promoting equity across our region.

Implementation resulted in a lot of new programs, from our Community Champions program to professional advisor events, to community information panels. After looking back at 2019, this was a year we worked harder than ever to connect with our community and catalyze positive change. As we currently navigate the COVID-19 pandemic, social injustices, and economic worries, we are confident that our focus on vulnerable populations and working families is the correct direction. We have already experienced increasing need and will continue to follow our strategy to provide impactful support in critical areas.

The end of 2019 was also the end of an era. With 11 years of service at the Santa Barbara Foundation, Ron Gallo became our CEO Emeritus. Ron’s work has laid the foundation for a strong future for Santa Barbara County, and we will be forever grateful for his leadership and commitment to our region.

One local entrepreneur used to say, after becoming dominant in his industry, “You can see a lot from the top of the mountain, but you cannot see the mountain.” Looking internally and taking the time to self-reflect and become self-aware has allowed us to rise to the challenges of today and build a stronger tomorrow. Join us in our work; we cannot do this without you.

In community,

Jackie M. Carrera
President & CEO
Santa Barbara Foundation

Pamela Gann
Chair of the Board of Trustees
Santa Barbara Foundation
For 92 years, our donors have entrusted us to invest their charitable dollars with empathy and an eye toward significant and measurable impact. Our work is only possible through our donors and partners who support initiatives ranging from the essential necessities of everyday life to innovative programs that will lead us all to a better future.

Take a look at a few select milestones of our long track record of enhancing life in Santa Barbara County since our inception in 1928.

1928
The Band Shell in Pershing Park
During the Great Depression, SBF supported outdoor summer concerts at what was then known as Plaza Del Mar. The public concerts raised community morale during hard economic times.

1934
The Community Chest Milk Fund
SBF invested in a rest camp and fund to provide food for undernourished children in efforts to help children achieve normal weight and decrease their susceptibility to disease.

2009
Santa Barbara County Community Caregiving Initiative
Since 2009, SBF has convened and advocated for 70,000+ caregivers in Santa Barbara County. Marian Regional Medical Center focused on patient education.

2017
Community Disaster Relief Fund
From 2017 to 2019, SBF has invested in over one million dollars in relief efforts following the Thomas Fire and 1/9 Debris Flow.
Substandard Housing
SBF invested in a survey of substandard housing by the Santa Barbara Mayor’s Low-Cost Housing Committee. The survey revealed that some 500 persons occupied buildings unfit for human habitation. From this report, the Santa Barbara Housing Authority was formed.

Santa Barbara Committee for Education on Alcoholism
SBF invested in New House and Casa Serena - alcohol recovery homes for men and women. This organization has thrived and now provides behavioral health programs to two additional homes.

Drought Solutions
SBF established a Water Development Fund to research various means for water development in the county. With the completion and over spilling of the Bradbury Dam on April 12, 1958, Lake Cachuma was created as protection against droughts.

Investments in Health
In the 1960’s, SBF invested nearly $500,000 in Cottage, St. Francis, Santa Ynez Valley, and Marian Hospitals. All county hospitals underwent major expansions to provide additional beds and better quality of care for our communities.

Behavioral Health & Health Care Grant Program
In 2019, SBF invested $751,000 in behavioral health & health care nonprofits and service providers.

Food, Shelter & Safety Grant Program
In 2019, SBF invested $626,000 in food, shelter & safety nonprofits and service providers.

The Towbes Fund for the Performing Arts
In 2019, the Fund granted $500,000 to high quality performing arts programs in Santa Barbara County.

In 2019, SBF, in partnership with our donors invested $31 million in Santa Barbara County nonprofit organizations to improve our communities.
Thousands of families in Santa Barbara County are struggling to afford the high cost of living. Good quality child care becomes an additional cost that can take up a considerable portion of a family’s income.

“There were times when we thought about it – are we both going to work full time, work our tails off, and spend little time as a family, just so we can put all of our money into rent and child care?” shared Meighan Parker, (pictured left with her family) a former Santa Barbara resident who moved her family to Lompoc in 2018, where property and the cost of living is much more affordable.

SBF is committed to strengthening working and vulnerable families. We engage with local partners to address the challenges of providing quality care for our youngest residents. In 2019, the Foundation provided $135,000 in Early Care and Education Grants in support of quality early care and education programs and the direct service providers that enable their success.
Child Care Grant Program
2019 Grantees
Carpinteria Children's Project
Child Abuse Listening Mediation, Inc. (CALM)
Children and Family Resource Services
Fighting Back Santa Maria Valley
Isla Vista Youth Projects, Inc.
Regents of the University of California, Santa Barbara
Santa Maria Valley YMCA
Storyteller Children's Center, Inc.
Transition House

William And Lottie Daniel Fund Child Care Scholarship
2019 Grantees
Carpinteria Children's Project
Channel Islands YMCA - Lompoc
Girls Incorporated of Carpinteria
Girls Incorporated of Greater Santa Barbara
Hope Community Church
Isla Vista Youth Projects, Inc.
Salvation Army - Santa Barbara Corps
Santa Barbara Education Foundation
Santa Maria Valley YMCA
St. Mary of the Assumption
St. Vincent's
Storyteller Children's Center, Inc.
Transition House
With a long history of working with local government, the Santa Barbara Foundation (SBF) collaborates to create more affordable housing opportunities and essential services to homeless individuals in Santa Barbara County.

In 2019, the Santa Barbara Foundation joined forces with the City of Santa Barbara to take a new approach to the housing crisis affecting our region. The Foundation and the City each committed $100,000 to form a homelessness collaborative led by the Santa Barbara Alliance for Community Transformation (SB ACT).

The collaborative, known as ACT on Homelessness, is addressing homelessness in Santa Barbara by creating a Common Agenda focused on issues of homelessness prevention, family homelessness, and more. This innovative partnership encourages direct service providers to share information and resources with one another to provide more effective, holistic services to Santa Barbara residents struggling with homelessness or at risk of becoming homeless.

The Foundation’s Community Grant Programs support organizations such as the Foodbank of Santa Barbara County that work with partners throughout the region to provide food to those in need. The Foodbank serves a wide variety of community members countywide, including seniors, students, working families, and homeless individuals.

Photo courtesy of Foodbank of Santa Barbara County.
New Beginnings Counseling Center is a Santa Barbara-based nonprofit that has supported vulnerable residents for over 50 years and is a national leader with their innovative Safe Parking Program® (SPP). Safe parking programs are an important part of the effort to reduce homelessness.

Photo courtesy of Cassandra Giraldo of VICE News.
The Santa Barbara Foundation supports Santa Barbara County’s most vulnerable populations by addressing basic human needs and finding creative solutions to the challenges facing working families – many who live paycheck to paycheck.

Our Community Grant Programs strengthen and augment the safety net for vulnerable individuals and families by funding organizations that improve the delivery of quality health care, build capacity for mental health services, address food insecurity, and strengthen homelessness programs and resources.

SBF understands that in order to solve any complex challenge, we must have a common understanding of its causes. As a resource for the county, the Foundation holds a series of community education forums each year that focus on important issues aligned with supporting our most vulnerable communities in Santa Barbara County. These events are designed to share knowledge and information with community members and connect them with community experts.

The Foundation granted nearly $1.4 million in 2019 to Santa Barbara County nonprofits through our Community Grant Programs.
...there are so many amazing organizations serving our community and it’s an honor to get to review their grant applications and help decide who gets funding – to be a part of this fabric of support.

—Dr. Shereen Khatapoush, 2019 Health Care and Behavioral Health Care committee member and Research & Program Evaluation Supervisor for the Santa Barbara County Department of Behavioral Wellness.
More Than Just A Grantmaking Committee

What do you do when there are limited funds and an extraordinary amount of need? How do you choose which organizations will receive grant funding when it is evident that all of them provide critical services to our community? At the Santa Barbara Foundation, these tough decisions are made by Grant Committees comprised of community experts, Foundation Trustees, philanthropists, and staff.

For each grant program, a new committee is formed to best reflect community knowledge in the grant area. By utilizing the expertise of professionals already addressing community needs in the field, each committee has a fundamental understanding of the issues faced by our communities and the agencies that serve them. Committee members bring diverse perspectives to the table as they review each grant proposal.

Behavioral Health 2019 Grantees
Casa Serena
Child Abuse Listening Mediation, Inc. (CALM)
Council on Alcoholism & Drug Abuse (CADA)
Family Service Agency of Santa Barbara
Hospice of Santa Barbara, Inc.
Mental Health Association in Santa Barbara County (Mental Wellness Center)
Standing Together to End Sexual Assault
The Pacific Pride Foundation, Inc.
Transitions-Mental Health Association
YouthWell Coalition

Food 2019 Grantees
Community Action Commission of Santa Barbara County
Cuyama Valley Family Resource Center
Foodbank of Santa Barbara County
Organic Soup Kitchen
Santa Barbara Meals on Wheels
Santa Ynez Valley Fruit & Vegetable Rescue
Santa Ynez Valley Senior Citizens Foundation

Health Care 2019 Grantees
Community Health Centers of the Central Coast, Inc.
Doctors Without Walls - Santa Barbara Street Medicine
Hillside House
Planned Parenthood California Central Coast
Sansum Diabetes Research Institute
Santa Barbara Neighborhood Clinics
Visiting Nurse and Hospice Care Foundation

Shelter & Safety 2019 Grantees
Channel Islands YMCA, Youth and Family Services
Domestic Violence Solutions
Good Samaritan Shelter, Inc.
New Beginnings Counseling Center
People Assisting the Homeless
Santa Barbara Rescue Mission
Transition House
Unitarian Society of Santa Barbara
Villa Majella of Santa Barbara
Photo courtesy of Mental Wellness Center.
FIELDS OF INTEREST

Towbes Fund For Performing Arts

Thanks to the Towbes Fund for the Performing Arts (TFPA), grants are available to organizations seeking to further their missions of producing outstanding performance art and providing valuable youth development opportunities. TFPA seeks to invest in, nurture, and grow the arts sector by offering support for quality performing arts organizations, with the goal of increasing access to art, music, dance, and theater programs in Santa Barbara County.

In 2019, the Santa Barbara Foundation awarded $500,000 to 39 performing arts organizations through the TFPA Grant Program.

“The arts are unmatched in defining our humanity, lifting our spirits and bringing us together,” said Ron Gallo, CEO Emeritus at the Santa Barbara Foundation. “Fortunately, SBF is well positioned to provide this support due to the generous legacy of the late Mr. Michael Towbes, who well understood the importance of the arts – and particularly the performing arts – to building vibrant communities. We thank him and the many people and organizations that everyday keep the arts vibrant throughout Santa Barbara County.”
Community recovery is not a one year process. In 2019, the Santa Barbara Foundation continued to provide support for those affected by the 2017 Thomas Fire and 1/9/2018 catastrophic debris flows. Disaster recovery is an extremely complex process, and it can take many years for a community to fully overcome these challenges.

In the aftermath of the 1/9 Debris Flow, the Foundation activated the Community Disaster Relief Fund (CDRF), an emergency response fund designed to support nonprofit organizations in short-term and long-term recovery. SBF facilitated two grant cycles through CDRF, with the first cycle awarded in April 2018 to organizations leading the recovery efforts in the immediate aftermath of the disaster.

While our community has shown remarkable resilience following this traumatic experience, many residents are still dealing with the long-term effects of the disaster. In April 2019, the Foundation facilitated another CDRF grant cycle, with funding split between organizations addressing long-term recovery, and those that are taking the lead on mitigation and preparedness for future emergencies. Through CDRF, the Foundation is able to meet the long-term needs of many disaster survivors and the nonprofits who serve them.

In 2020, the Foundation relaunched CDRF to support organizations and residents affected by the coronavirus pandemic through the active COVID-19 Joint Response Effort.

Over a year after the devastating 1/9 Debris Flow, many community members were still struggling to get back on their feet. Fortunately, the Foundation had prepared for a lengthy recovery process, and was able to utilize the Community Disaster Relief Fund to meet the long-term needs of disaster survivors and the nonprofits who serve them.
Senior Programs Of Santa Barbara Committee Advised Fund

The Senior Programs of Santa Barbara Committee Advised Fund is an invested fund in the Long-Term Endowment Pool managed in perpetuity by the Santa Barbara Foundation. Senior Program Grants support programs and projects directed to the welfare of senior citizens in the cities of Santa Barbara, Goleta, and Carpinteria. The Foundation provided 13 grants totaling $53,500 in 2019.

Tri-Counties Blood Bank

In August 1997, Tri-Counties Blood Bank (TCBB), a nonprofit public benefit corporation, sold all of its assets to Haemonetics Corporation, a Massachusetts for-profit corporation. In accordance with the California Corporation Code, after payment of liabilities and expenses, the remaining TCBB funds were transferred to the Santa Barbara Foundation, the San Luis Obispo Community Health Foundation, and the Monterey Community Foundation.

In July 1998, the Santa Barbara Foundation entered into an agreement with TCBB to establish the Tri-Counties Blood Bank Fund. Valued at nearly $5 million, it is now part of the Foundation’s restricted funds. Through an annual grant program, the Foundation distributes income generated from the Fund to qualified nonprofit organizations. These grants are restricted to activities that support blood and blood-related products and services in accordance with the plan of disposition, including Indigent Care Grants, Education Grants, and Scholarships. In 2019, the Foundation granted $202,000 through TCBB.

Photo courtesy of Foodbank of Santa Barbara County.
SUPPORT FOR THE SOCIAL SECTOR

The Collaboration For Social Impact

The Collaboration for Social Impact (CSI) ensures nonprofit leaders and organizations have the tools, skills, and resources to fulfill their missions. With CSI, our goal is to support capacity building, facilitate workshops, seminars, coaching and mentoring, and engage in public and social sector advocacy. This launch included our first Leadership Awards, with the purpose to ensure nonprofit leaders and organizations have the tools, skills, and resources to fulfill their mission.

Small Capacity Building Grant

With close to 1,900 nonprofits serving Santa Barbara County, the nonprofit sector plays an important role in supporting our vulnerable community members and working families. It is a high priority of the Foundation to provide additional resources to these organizations through the Small Capacity Grants Program. SBF believes that maintaining a healthy nonprofit sector leads to a healthier, more resilient community.

The program provides funding to help organizations strengthen their capacity for better programmatic outcomes, leading to positive change in our community.

In 2019, the Foundation awarded a total of $324,200 in Small Capacity Building Grants to 72 organizations from across the county.
Leadership Awards

Launched in May 2019, the Collaboration for Social Impact sponsored the first Santa Barbara County Leadership Awards to honor the work of individuals and organizations that have demonstrated excellence as emerging leaders, collaborators, or visionaries.

2019 Santa Barbara County Leadership Award Recipients

Visionary Leader Award: Maricela Morales, Executive Director of Central Coast Alliance United for Sustainable Economy (CAUSE).

Better Together Award: Santa Barbara Neighborhood Clinics collaboration with the Bridge Clinic, which includes Cottage Health, CADA, AEGIS, and New Beginnings Counseling Center.

Emerging Leader Awards: Valerie Kissell, Executive Director of Youth & Family Services YMCA (Noah’s Anchorage Youth Crisis Shelter) and Edwin Weaver, Executive Director of Fighting Back Santa Maria Valley.
A Different Point of View
Animal Shelter Assistance Program
of Santa Barbara
Boy Scouts of America Council
Boys & Girls Club of Santa Barbara, Inc.
California Native Plant Society
Carpinteria Education Foundation, Inc.
Carpinteria Valley Arts Council
Casa Del Herrero Foundation
Catholic Charities of Los Angeles, Inc.
Channel Islands YMCA -Lompoc
Children’s Museum of Santa Barbara
The Consciousness Network, Inc.
Environmental Defense Center
Everybody Dance Now!
Flamenco Arts Festival
The Foundation for Santa Barbara City College
Friends of the Santa Maria Public Library
Future Leaders of America
Ganna Walska Lotusland
Girls Incorporated of Greater Santa Barbara
Girls Rock SB
Guadalupe-Nipomo Dunes Center
Immigrant Hope Santa Barbara CA, Inc.
Isla Vista Youth Projects, Inc.
Just Communities Central Coast
League of Women Voters of Santa Barbara
Education Fund
Little House By The Park
Lompoc Valley Community Healthcare Organization, Inc.
Lompoc Valley Master Chorale
Los Padres Forest Watch, Inc.
Media4Good, Inc.
Mental Health Association in
Santa Barbara County
Nature Track Foundation
Orcutt Area Seniors in Service, Inc.
Orcutt Children’s Art Foundation, Inc.
Organic Soup Kitchen
The Pacific Pride Foundation, Inc.
Page Youth Center
Public Square, Inc.
Quail Springs Permaculture
Santa Barbara Bicycle Coalition
Santa Barbara Botanic Garden, Inc.
Santa Barbara County Alliance for Arts Education
Santa Barbara Dance Institute
Santa Barbara Education Foundation
Santa Barbara Historical Museum
Santa Barbara Mountain Bike Trail Volunteers Inc
Santa Barbara New House
Santa Barbara Partners in Education
Santa Barbara Police Activities League
Santa Barbara Public Library Foundation
Santa Barbara School of Squash Inc.
Santa Barbara Trust for Historic Preservation
Santa Barbara Zoological Foundation
Santa Maria Museum of Flight
Santa Maria Philharmonic Society
Santa Ynez Valley Senior Advisory Council
Shadow’s Fund
SLO Noor Foundation
Solvang Friendship House
Soroptimist Safety Town of Santa Barbara
St. Marks School of Southborough Inc.
St. Vincent’s Institute
Transition House
Transitions-Mental Health Association
Unitarian Society of Santa Barbara
United Boys & Girls Clubs of Greater
Santa Barbara County
White Buffalo Land Trust
Women’s Economic Ventures
Zona Seca
Congratulations To The Women’s Fund

The Women’s Fund of Santa Barbara was formed in 2004 as a Collective Giving Field of Interest Fund with the Santa Barbara Foundation. Under this arrangement, the Foundation served as the Women’s Fund’s fiscal sponsor, which allowed the organization to use the Foundation’s tax-exempt status and expertise in financial management to help build the capacity of charitable projects.

The Women’s Fund is a volunteer-run organization that focuses on combining charitable dollars into significant grants that support the critical needs of women, children and families in southern Santa Barbara County. Since its inception, many local philanthropists have joined the Women’s Fund collective donor group and in 2012 the group established the Women’s Fund Endowment.

This endowment enables the Women’s Fund to be supported in perpetuity and to have a greater impact within the community. The Santa Barbara Foundation contributed a $10,000 grant towards the establishment of the endowment.

In 2019, the Women’s Fund became an independent tax-exempt nonprofit. The Foundation is proud to have assisted in the formation and growth of the Women’s Fund, and the two organizations remain strong community partners with many of the same priorities and focus areas. Since 2004, the Women’s Fund has grown its membership to over 1,100 and distributed nearly $7.9 million in grants which have impacted countless lives.
Community Champions Erik And Judy Frost

In 2019, the Santa Barbara Foundation introduced its Community Champion recognition program, which honors individuals contributing $1,000 or greater annually to the Community Engagement Fund*. Included in this circle of generous donors are Erik and Judy Frost, longtime supporters of the Foundation and well known philanthropists in Santa Barbara County.

The Santa Barbara Foundation thanks Erik and Judy, and all of our Community Champions, for their generous support which allows us to catalyze positive change in Santa Barbara County.

While Santa Barbara County is a wonderful place to live, there are many who find life here very challenging, said Judy & Erik Frost. “Neighbors struggle to put food on the table, find affordable housing, pay for quality child care, just staying safe and healthy. That is why we support the Santa Barbara Foundation. We are proud supporters for nearly 25 years and we are excited to be Community Champions. We feel great knowing our dollars have been put to good use. Our gifts and those of other Community Champions give SBF the power to invest in the causes and organizations best equipped and ready to affect positive change.

*Gifts to the Community Engagement Fund are unrestricted and strategically leveraged for positive impact in our communities across Santa Barbara County.
Celebrate Philanthropy honorees demonstrate a personal commitment to philanthropy; encourage or motivate others to become philanthropic leaders; give significant support (time and/or money) to nonprofit organizations; participate in broad-based charitable activities; work to improve the quality of life for residents in the Santa Maria Valley; and exhibit qualities such as creativity, collaboration and effective stewardship of community resources. The honorees Frank Ortiz, Scottie Ortiz, Judy Frost, and Erik Frost were celebrated at a luncheon on November 7, 2019 at the Santa Maria Country Club.
The Man & Woman of the Year Award honors Santa Barbara residents whose lifetime of volunteer service represents a meaningful commitment to the community; addresses a real community need or enhances the quality of life in Santa Barbara; or has involved acts of generosity, kindness, or innovation. David Boyd and Jelinda DeVorzon are the 76th Man & Woman of the Year recipients who were selected from a wide range of candidates and were honored on September 4, 2019 at the Coral Casino.
Thank You, Ron Gallo!

Many know Ronald V. Gallo, Ed.D. as the welcoming face and driving force behind the Santa Barbara Foundation. After 11 impactful years as President & CEO of the Santa Barbara Foundation, Ron has stepped down to pursue a new opportunity as President & CEO of the Community Foundation of Louisville. We are excited for Ron as he embarks on this new journey, and we are grateful for his incredible leadership of the Santa Barbara Foundation.

Ron’s impact has been profound. Under his leadership, the Santa Barbara Foundation has become a nearly $500 million community foundation, has broadened its approach to the use of philanthropic capital, has focused on building an inclusive board and staff, has deepened its commitment to serve all parts of the county, and has leaned into innovation and partnerships with an ever-expanding group of people and organizations. He was a steadfast advocate for the newly-launched strategic plan, which puts special emphasis on Santa Barbara County’s most vulnerable populations and the challenges of working families.

“Ron Gallo served as the Foundation’s fearless leader for more than a decade. His extraordinary commitment to our work and our communities has lifted this organization to new heights,” said Jackie Carrera, who was selected to succeed Ron as President & CEO following a national search. “While I certainly have some big shoes to fill, I am honored to be in a position to continue the important work that Ron helped set in motion.”

Reflecting on his time with the Foundation, Ron expressed gratitude for the opportunity to make an impact in Santa Barbara County. “I am enormously proud of what the Foundation accomplished during my tenure. It has been, quite simply, one of the best and most fulfilling chapters of my life.”

Over the years, Ron has touched the lives of so many through his wisdom, generosity, eloquence, and passion for helping others. On behalf of the Santa Barbara Foundation and everyone who has had the pleasure of working with him, we would like to thank Ron for his incredible service to Santa Barbara County!
INVESTING WITH SBF

The Santa Barbara Foundation has been investing and growing philanthropic capital for decades, and in recent years, the Foundation’s investment options have expanded dramatically.

In 2003, the Foundation offered only one investment portfolio – our Long-Term Endowment portfolio – which included $96 million in community funds. Today, SBF oversees approximately $180 million in four diversified portfolio options. These assets include donor advised funds and agency funds, as well as other specific fund types managed by the Foundation.

When setting up a fund with SBF, fund holders can now select from the following four investment portfolios based on their preferences: Long-Term Endowment, Focus Growth Blend, Focus Income Blend, and Socially Responsible Blend.

The Foundation’s largest portfolio, the Long-Term Endowment, was created over thirty years ago. At the end of 2019, the Long-Term Endowment portfolio showed an average annual return of 7.1% since inception. The most recent addition to SBF’s investment options is the Socially Responsible Blend, which was created in 2017 and takes environmental, social, governance and other factors into account in making investment decisions.
SBF’s Investments Team is led by Director of Investments Cheri Savage, who has significant experience managing investments, planned gifts, donor relations, and general accounting. Cheri is responsible for overseeing the Agency Endowment Program (SBF now manages the endowments of over 65 nonprofit organizations) and many aspects of our deferred gifts.

Cheri is part of a comprehensive investment team at SBF, responsible for daily oversight of the portfolios. She works closely with the Santa Barbara Foundation Board of Trustees, as well as our Investment Committee and Meketa Investment Group, the investment consultant, who has advised on the Foundation’s investments since 2017. Wells Fargo is the Foundation’s custodian and record keeper for all portfolios, and has been for decades.

The Foundation’s endowment (community dollars) is invested in all four portfolios. Each portfolio is structured for a specific return and risk profile and all have a long-term investment horizon. The investment process is specifically defined by the Investment Policy Statement, which was approved by the Trustees. All decisions are made as part of a group review and approval process driven in large part by our investment committee and our investment consultant.
Navigating the world of philanthropy can be challenging. For this reason, the Santa Barbara Foundation encourages donors to connect with knowledgeable professional advisors. Professional advisors play an important role in connecting the charitable goals of clients to community needs. They can also provide up-to-date legal, tax, and investment advice to help donors make the best charitable decisions possible.

In 2019, the Foundation hosted two professional advisor presentations - Composing a Legacy: Planning Your Will & Trust and Charitable Giving Under the New Tax Law. These presentations were designed to introduce donors to professional advisors, and provide information on how to avoid unnecessary taxes, utilize strategies to give more money, and find alternate ways to give.

In May of 2019, Aaron Ritter, CFP®, MS, Avalon Wealth Management, led a Professional Advisor presentation at the Santa Barbara Foundation. During the presentation, Ritter shared how to maximize charitable giving under the new tax law and provided tips for developing charitable income tax strategies.
Thank You To Our 2019 Professional Advisors Panelist

Peter Brill, Former Board Chair, Sustainable Change Alliance
Christopher Gallo, CFP, CIMA, CPWA – Vice President of Wealth Management, UBS
Brittany D. Hansen, JD, LLM – Associate Attorney, Ambrecht & McDermott, LLP
Stephen MacIntosh, CWS®, CPFA – Investment Advisor & Director of Financial Planning, Argyle Capital Partners
Brooke C. McDermott, JD LLM – Partner, Ambrecht & McDermott, LLP
Aaron Ritter, CFP, MS – Avalan Wealth Management
As of and for the year ended December 31, 2019
At the close of 2019, the Santa Barbara Foundation gave $31 million in grants, received $26 million in contributions, and had $509 million assets.
### SBF’S BALANCE SHEET*

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<th>Assets</th>
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<th>With Donor Restrictions</th>
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<td><strong>Total Liabilities and Net Assets</strong></td>
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### SBF’S INCOME STATEMENT*

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<th>Revenue, Gains and Other Support</th>
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<td>$23,511,532</td>
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<td>Change in Value of Trusts</td>
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<td>$3,766,962</td>
<td>$3,766,962</td>
</tr>
<tr>
<td>Other Income</td>
<td>428,703</td>
<td>-</td>
<td>428,703</td>
</tr>
<tr>
<td>Reclasifications and Releases from Restrictions</td>
<td>(631,149)</td>
<td>631,149</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total Revenue, Gains and Other Support</strong></td>
<td>$51,399,954</td>
<td>$11,027,285</td>
<td>$52,427,239</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants, Net of Rescinds</td>
<td>$30,849,330</td>
<td>-</td>
<td>$30,849,330</td>
</tr>
<tr>
<td>Less: Grants on behalf of Agency Fundholders</td>
<td>(728,544)</td>
<td></td>
<td>(728,544)</td>
</tr>
<tr>
<td><strong>Total Grants, Net of Rescinds</strong></td>
<td>$30,120,786</td>
<td>-</td>
<td>$30,120,786</td>
</tr>
<tr>
<td>Grantmaking and Direct Program</td>
<td>6,171,851</td>
<td>-</td>
<td>6,171,851</td>
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<tr>
<td>Program Services</td>
<td>36,292,637</td>
<td>-</td>
<td>36,292,637</td>
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<tr>
<td>Administrative and Fund Management</td>
<td>2,257,212</td>
<td>-</td>
<td>2,257,212</td>
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<tr>
<td>Philanthropic and Donor Services</td>
<td>1,919,533</td>
<td>-</td>
<td>1,919,533</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>$40,469,382</td>
<td>-</td>
<td>$40,469,382</td>
</tr>
</tbody>
</table>

| Change in Net Assets                  | $10,930,572               | $11,027,285             | $21,957,857 |
| Net Assets, January 1                 | $336,286,751              | 121,946,563             | 458,233,314 |
| Net Assets, December 31               | $347,217,323              | $132,973,848            | $480,191,171 |

*Amounts are in U.S. dollars. Data and financials in 2019 Annual Report are preliminary and are subject to change upon audit. The final audited numbers will be available later in 2020 at SBFoundation.org.
Thank you to the donors, listed below, who have made gifts to one of the Santa Barbara Foundation’s discretionary funds. These gifts allow SBF to remain flexible and relevant to Santa Barbara County’s most pressing needs by allowing our team of community experts to invest strategically in our county.

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#### $1 million +
- Mayer Living Trust

#### $100,000-$999,999
- Cavelletto Charities
- Georgia Lee Funsten Revocable Trust
- John Weymouth
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- Dan and Caroline Encell
- Mona Evans and Jeffery Ruppert

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Laszlo and Antoinette Kiraly
Daniel and Diane Krieger-Carlisle
Armand Kuris and Bari Ramoy
James and Elinor Langer
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Ann Pless
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Alice Primrose
Kristie Qualman
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Buellton Library Endowment
CACA Endowment Fund
Carpinteria Rotary
Charitable Foundation
Charlotte’s Web Children’s Library Endowment
CJSSA Endowment Fund
Domestic Violence Solutions Fund
Faith Lutheran Church Endowment Fund
Foodbank SBC Fund
Friends of Los Banos Del Mar Pool
Friends of the Fiscalini Ranch
Preserve Endowment Fund
Friends of the Fiscalini Ranch
Preserve Expendable Fund

General Libraries Endowment
Girls Incorporated of Carpinteria
Endowment Fund
Good Samaritan FG
Good Samaritan Fi
Good Samaritan Shelter
Endowment Fund
Guadalupe-Nipomo Dunes Center Endowment Fund
Hancock Promise Endowment
Ian M. Hassett Foundation
Jim Stanley Memorial Endowment
Las Positas Tennis Center
Legacy Fund of St. Andrew’s Episcopal Church of Ojai
Lions Sight and Hearing Center
Lompoc Library Endowment
Meals on Wheels-Santa Maria Valley
Montecito Retirement Association
Morning Rotary of Carpinteria
Charitable Foundation, Inc.
New Directions Endowment
Northern Santa Barbara County
United Way Endowment Fund
Orcutt Children’s Arts Foundation, Inc.
Endowment Partners in Education/Computers for Families Fund
Peggy Bergmann PYFC Endowment Fund
People for Leisure and Youth Fund
Pilgrim Terrace Co-Op Homes Rotary Club of Santa Barbara Sunrise
Charitable Foundation
Santa Barbara Choral Society Endowment Fund
Santa Barbara Choral Society-FG
Rotary Club of Santa Maria Boys & Girls Club Foundation Endowment Fund
Santa Barbara Education Legacy Foundation
Santa Barbara Education Foundation Fund
Santa Barbara Meals on Wheels, Inc.
Endowment Fund
Santa Barbara Caritas Vintners’ Fund
Santa Maria Boys & Girls Club Foundation Endowment Fund
Santa Barbara Breakfast Rotary Foundation (Growth)
Santa Maria Breakfast Rotary Foundation (Income)
Santa Maria Valley Humane Society Endowment Fund
Santa Maria Valley YMCA Foundation Fund
Santa Maria Valley YMCA Fund - GenSpan
Santa Ynez Valley Humane Society Endowment Fund
Smooth Inc.- Focus Growth
DONOR ADVISED FUNDS


DONOR DESIGNATED FUNDS

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FIELD OF INTEREST FUNDS

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Access Theatre Endowment Fund
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Ava P. Richards Fund
Ballentine Foundation
Barbara J. Wright & Phyllis E. Zimmerman Scholarship Fund
Barbara L. Hilmich Fund
Binam Wood Helping Hands Fund
Carlin Dunne Foundation FOI
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Edica Mary Uccello Scholarship Fund
Emily Lawrence Newton Fund
Energy Partners Fund
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Gilbert V. Hamilton Fund (for student aid)
Global Neighborhood Fund
Grace Fisher Foundation
Gwendolyn M. Floro Fund
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Isabel Hayden Bartolome Student Loan Fund
Jake Gimbel Trust
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Lillian B. Smith Student Aid Fund
Louise F. Mollath Fund
Madeline Verga Schroll Fund
Marianne and Stacy Cocks Endowed Fund
Marianne and Stacy Cocks Fund
Marty Karoff Fund for Social Venture Partners of SB
Mary K. and Edith Pillsbury Foundation Fund
Max Lynn and Shirley A. Lynn Memorial Fund
May Lindgren Fund
Mercedes H. Eichholz Health Services Fund
Mercedes H. Eichholz Scholarship Fund
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Robert O. Dougan Fund
Rubie Burton Fund
Ruth and Walter C. Klass Scholarship Fund
S. Jordan Family Fund
Santa Barbara Better Together Fund
Santa Barbara Boys Choir Scholarship Fund
Santa Barbara County Veterans Fund
Santa Barbara Foundation Conservation and Restoration Fund
Sherman and Elizabeth Ashe Memorial Scholarship Fund
Sieff Family Loan Fund
Silvio DiLoreto Scholarship Fund
Slusser Fund for Nonprofit Collaboration
Social Venture Partners Santa Barbara
The Cleo Purdy Fund for Early Childhood Education & English Language Proficiency
The Nancy and David Potter Scholarship Fund
The Toporeck Family Student Aid Fund
Towbes Fund for the Performing Arts
Tri-Counties Blood Bank Field of Interest Fund
Valley Community Hospital Auxiliary Fund
Vow4Mal
Westside Youth Initiative
William F. Gunnerson Fund
Women’s Fund of Northern Santa Barbara County
Women’s Fund of Santa Barbara
Zurawski-Staff Fund

FISCAL SPONSORSHIPS
Academy of Imaginal Arts and Sciences
Apples to Zucchini Cooking School Arts and Culture Fund for Santa Barbara County
CBeyondcancer
Community Trauma Care Down Syndrome Association of Santa Barbara County Feed the Valley
Grace Fischer Foundation
The Hearing Loop Fund
Hope Ranch Beautification Fund
introNetworks@SBConnect Fund
Julia Child Fund for the Santa Barbara Culinary Experience
Juneteenth Santa Barbara
The Key Class Fund
Magoo’s Shoes
Needs To Foundation
Pacific Graduate Institute Fund
The Partnership for Resilient Communities
Rooted Santa Barbara
Sage Associates Fund
Santa Barbara County Alliance for Arts Education
Santa Ynez Valley Teen Arts
SB Poetry
SBsnap
School Wellness Council
Sustainablefuture.org
Vital Santa Barbara

SUPPORTING ORGANIZATIONS
Highland Santa Barbara Foundation Inc
Eric and Kelly Schwartz Charitable Trust

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Lani Wollschlager

Design: Natalie Wong
Photography: Dean Zatkowsky

Special thanks to Ron V. Gallo, Ed.D., our former President & CEO, and Barbara Andersen, our former Chief Strategy Officer, who worked diligently to build this strategy for Santa Barbara County. They both have embarked on new endeavors that are close to their hearts.