



25 years

2013
*Report to
Our Communities*

THURSTON, MASON & LEWIS COUNTIES



THE COMMUNITY FOUNDATION
OF SOUTH PUGET SOUND

Moving Philanthropy Forward

Upon Reflection:

A quarter century ago, a group of community leaders conducted a “visioning” exercise to create a mechanism to ensure a quality future for the place they called home. Their work led to The Community Foundation of South Puget Sound.

Their idea wasn’t new: The first community foundation was started in Cleveland, 100 years ago. We like to call ours the “now and later” Foundation because donors can put their charitable dollars to work today or for perpetuity, or in any combination of both.

Since 1989 donors have supported The Foundation and informed its mission to inspire philanthropic efforts that enrich our communities. We’re proud of the fact that over the past decade we’ve made \$5.5 million in grants and scholarships to South Sound nonprofits and college-bound students. Today, our assets exceed \$16.5 million within more than 75 funds.

But we know that our success was born of the communities we serve, people like you. At your core, you are generous. Without you, The Foundation would not be here doing dynamic and important work. We genuinely appreciate the culture of giving that has sustained us for 25 years. We thank you for the opportunity to work with so many, now and forever.

Sincerely,



Lori Drummond
2013 BOARD CHAIR



Norma Schuiteman
PRESIDENT & CEO



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Multi-county initiative—

Community Foundation Innovates with “Farms to Market” Report

An extensive recent study, the *South Puget Sound Farms to Market Assessment*, brings fresh data and perspective to a longstanding challenge faced by small, local farmers—How to sell more produce to potential buyers, especially in the largely untapped retail and institutional markets?

Gathering data from 39 farms in Mason, Lewis and Thurston counties, the study uncovered chief obstacles—as well as opportunities—to marketing produce more effectively. A common thread in the findings was the potential economic benefit of aggregating the means to get produce to markets, such as shared farm machinery and delivery trucks, and creating centralized “food hubs” where large amounts of produce can be washed, processed and stored under refrigeration.

“Consumer demand is soaring for local and organically farmed fruits, vegetables and meats,” said Lisa Smith of Enterprise for Equity, which initiated the study. “This is a growing sector of our regional economy, and now, for the first time, we have a comprehensive, detailed analysis of what’s working well and not so well between farmers and the customers they’re trying to reach.”

The study utilized surveys, interviews and site visits to glean its findings. It also brought together produce sellers and buyers for informational exchanges, as well as business networking opportunities. The networking allowed owners and chefs of restaurants, hospital kitchens, school and university cafeterias, grocery stores and other institutions to share their needs directly with farmers.

“The head chef at one local hospital asked for business cards from nine local farmers, and has been working with them ever since,” said Lucas Patzek, Ph.D., WSU Extension Thurston County, co-author of the study.

“This is breakthrough research, and we’re getting calls from other counties across the state that want to model our study,” Patzek said, “and the Port of Olympia is interested in possible solutions to farmers’ needs for distribution hubs and cold storage.”

The study was directed by Enterprise for Equity with chief funding made possible by a grant from The Community Foundation’s *Fund for the Environment*.

*LEAH WHITE, FORMER FARM MANAGER OF
FARM AT WATER’S EDGE, BELFAIR*



In Lewis County — **Grant Adds Spark to Fire Mountain Arts**

Remote and rural communities, while often beautifully situated, are also prone to job loss, population flight, and lack of resources for youth and others at risk. Since 2005, service organizations in Morton, an historic timber town in eastern Lewis County, have received funding from The Community Foundation of South Puget Sound, primarily to support the Morton Teen Center, the Cispus Learning Center and the Fire Mountain Arts OnStage Children's Theater Program.

The Community Foundation funded a \$10,000 discretionary grant to help Morton's Fire Mountain Arts Council, an all-volunteer nonprofit, to pay production costs for their 2014 children's theater program. Under the guidance of Fire Mountain, children perform on the stage of the Roxy Theatre, an historic venue and local treasure.

The Roxy also received Community Foundation restoration funds in 2011.

Funds for the children's theater program allow Fire Mountain a respite from constant fundraising. With essential production costs secured, Fire Mountain is able to focus on organizational capacity, while providing a series of performances that demonstrate the value of keeping youth engaged in education, the arts, and their community.

**FIRE MOUNTAIN ARTS ONSTAGE
CHILDREN'S THEATER EDUCATION PROGRAM**



In Mason County— **“Bridge to Prosperity” Spans Generations in Poverty**

Putting a face on poverty is the first step to increasing awareness of its root causes and continuation between generations. Few people do a better job of portraying the true face of poverty than Donna Beegle, Ph.D., nationally acclaimed speaker and expert on the subject.

Dr. Beegle spearheaded the first of a multi-faceted approach to alleviating poverty in Mason County, turning her life experience and education into a compelling narrative before hundreds of attendees during a series of workshops throughout Mason County.

Beegle's message, identifying barriers that inhibit self-sufficiency, was directed at educators, social workers, business leaders, community activists and health care professionals. Her impact was considerable, according to Mason County resident Diane Cooper of Taylor Shellfish. “We're bringing the whole community together to challenge our common misperceptions about poverty,” Cooper said.

The Community Foundation provided primary funding for the two-year educational initiative through its partnership with the Bill and Melinda Gates Foundation. Focused on alleviating intergenerational poverty, the initiative was orchestrated by Mason Matters, an organization dedicated to improving the health and quality of life for Mason County residents. Concurrent phases include workshops by Dr. Kathleen Budge and Dr. William Parrett, authors of *Turning High Poverty Schools into High Performing Schools*, supported by intensive community follow-through sessions based on the Crittenton Women's Union successful *Bridge to Self-Sufficiency* model.

**DR. DONNA M. BEEGLE, AUTHOR OF “SEE
POVERTY, BE THE DIFFERENCE,” AND “AN
ACTION APPROACH TO EDUCATING STUDENTS
WHO LIVE IN THE CRISIS OF POVERTY”**



In Thurston County— Coordinating Efforts to Tackle Poverty – ThurstonABC

The Community Foundation granted \$80,000 to the Thurston Asset Building Coalition (ThurstonABC) to bolster coordination and integration within the six-year-old organization.

ThurstonABC's mission is to form a seamless, integrated network of providers working together to create an environment minimizing barriers to self-sufficiency for people with limited incomes. The coalition members explored gaps in services and identified a nontraditional framework for collaboration involving private and public partners under the ThurstonABC umbrella.

The coalition's ongoing work focuses on the constellation of issues people face to escape poverty's grip. It is imperative that the network of providers ensure that their services improve access to food, housing, health resources, jobs and the skills people need to move beyond self-sufficiency toward prosperity.



*Thurston Asset
Building Coalition
meeting*

In Lewis County— Ellen Anderson deMoise Scholarship Links Mother's and Daughter's Wishes

The deMoise family has always honored higher education, going back to the earliest days of their *Forget Me Not* family ice cream business on State Street in Chehalis.

“Mom was a teacher in her younger days, but both Mom and Dad knew the difference a good education could make,” said Luellen Charneski of L&E Bottling Company. “They hired lots of high school kids at the ice cream plant and later at the bottling company, and were very encouraging toward those who planned and saved for college.”

After her mother Ellen's passing in 1995, Luellen sought out The Community Foundation of South Puget Sound to set up a scholarship fund in her mother's honor. The Foundation has managed the fund ever since, now in its 19th year.

“The scholarship is for Lewis County, aimed at rural high school kids who want to go on to an accredited college or university,” Luellen said. “In the old days you could work your way through college but that's not the case anymore. It costs so much to go to school. Scholarships are really valuable and my mother's scholarship reassures me that every year our family is making a difference.”

LUELLEN CHARNESKI



25 years of trusted service— *Moving Philanthropy Forward*

Whether adjusting to changes in community needs, or looking beyond those needs to foster a deeper knowledge of philanthropy itself, for more than a quarter century The Community Foundation of South Puget Sound has made a lasting impact.

Begun in 1989 as a response to a community “visioning” session called *Olympia 2010*, The Foundation was initially created to support the local nonprofit sector in achieving this vision.

THE YEARS 1996 TO 2010

Between 1996 to 2004 The Foundation earned a reputation for fiscal sponsorship and assistance in capacity building, with agencies such as the

Senior Action Network and South of the Sound Community Farm Land Trust gaining strength and independence due to this early support. During that time The Foundation hired its first fulltime executive director and acquired its current name. It also grew assets to \$1.9 million, and expanded its service area to include Mason and Lewis counties.

Beginning in 2004, the board of directors led a shift in the way The Community Foundation supported its ever-widening scope of work. It moved into a broader role of philanthropic leadership, primarily by expanding its asset base. Assets reached \$5.5 million, as new donors grew to trust The Foundation’s local knowledge and flexible giving options.



2010 TO PRESENT DAY

In October of 2010, The Foundation acquired the Irving A. Lassen Foundation, formerly a private foundation, nearly doubling its assets to \$11 million. More importantly, this provided a significant source for unrestricted grantmaking in Thurston County. Through 2013 The Foundation achieved other milestones, including the acquisition of the Jack and Neddie Rose Farrington estate, valued at approximately \$1.4 million. Another vote of confidence came with the receipt of a \$500,000 grant from the Bill and Melinda Gates Foundation's *Building Community Philanthropy* program. At the end of 2013, The Foundation's total assets exceeded \$16 million.



THE FUTURE: OUR MISSION & GOALS

With a perspective gained from 25 years of charitable giving, The Foundation is uniquely poised to address the deepest needs, ideals and opportunities of the three counties it serves. *Our approach is to inspire philanthropic efforts to enrich our communities. We move philanthropy forward.* Through our deep community knowledge, we empower and activate local networks, which concentrates our ability to forge effective partnerships.

We wish to be known as the foundation that inspires the awakening of potential in others, the yet-to-be-imagined solutions, and the far-reaching initiatives that shape our community bedrock where future generations will stand.

FOR A QUARTER CENTURY WE HAVE CHAMPIONED SOME OF THE BEST AND MOST INNOVATIVE INITIATIVES, AND THE MOST GENEROUS AND DETERMINED PHILANTHROPIC SPIRITS IN THE SOUTH SOUND



Financial Summary

January 1, 2013 – December 31, 2013

REVENUE AND SUPPORT

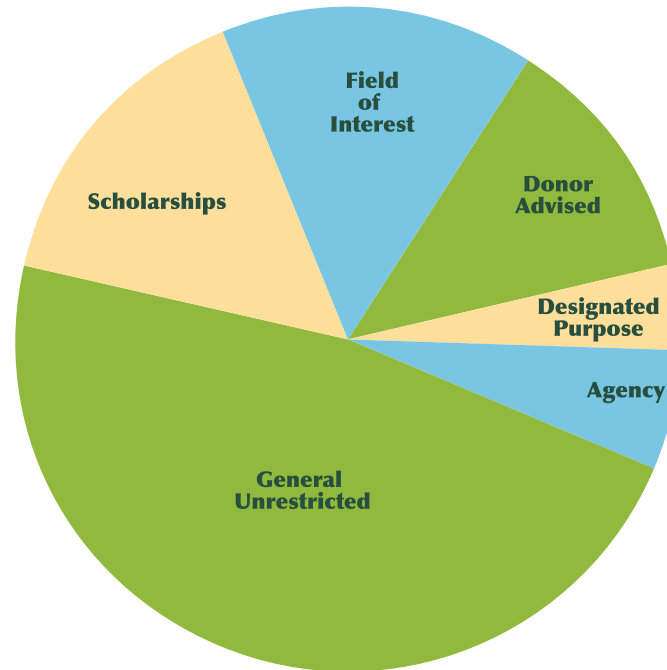
Contributions	\$ 529,210.00
Special events income	61,848.00
Administrative fees	257,075.00
Interest & dividend income	328,385.00
Other	28,955.00
Total Revenues and Support	\$ 1,205,473.00

EXPENDITURES

Program support	\$ 1,308,854.00
Management and general	163,632.00
Fundraising	40,298.00
Total Expenses	\$ 1,512,784.00

ASSETS

Total Assets, Dec. 31, 2012	\$ 15,332,050.00
Total Assets, Dec. 31, 2013	\$ 16,813,810.00



2013 FUNDS BY TYPE

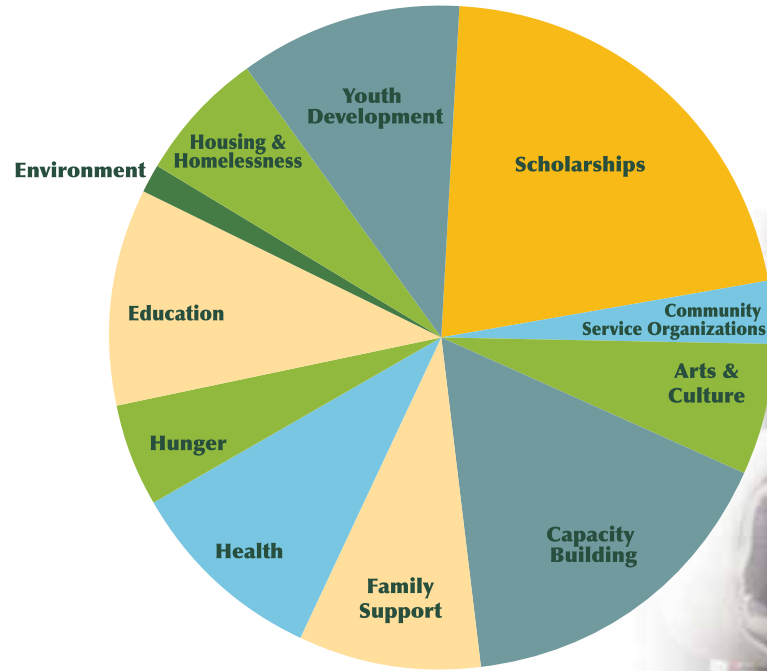
<u>Donor Advised</u>	<u>\$ 1,985,187.00</u>
<u>Designated Purpose</u>	<u>\$ 647,961.00</u>
<u>Agency</u>	<u>\$ 921,766.00</u>
<u>General Unrestricted</u>	<u>\$ 7,563,383.00</u>
<u>Scholarships</u>	<u>\$ 2,422,986.00</u>
<u>Field of Interest</u>	<u>\$ 2,399,956.00</u>
TOTAL	\$15,961,869.00

Grant Summary

2013 GRANTS AND SCHOLARSHIPS

Scholarships	\$145,866.00
Community Service Organizations	\$ 21,000.00
Arts & Culture	\$ 45,041.00
Capacity Building	\$111,710.00
Family Support	\$ 60,460.00
Health	\$ 65,045.00
Hunger	\$ 35,000.00
Education	\$ 71,632.00
Environment	\$ 10,000.00
Housing & Homelessness	\$ 43,800.00
Youth Development	<u>\$ 72,030.00</u>
Total Grants	\$681,584.00

Totals include 2013 discretionary and donor advised grants.



ROOF (ROCHESTER ORGANIZATION OF FAMILIES) FIELD TRIP

Confirmed in compliance with the National Standards for US Community Foundations



2013 List of Grantees

ARTS & CULTURE

Hands On Children's Museum
Student Orchestras of Greater Olympia
Capital Playhouse
Harlequin Productions
Washington Center For Performing Arts
Earthbound Productions
Olympia Arts Alliance
Tenino Young-at-Heart Theater
Olympia Symphony Orchestra
Ballet Northwest

COMMUNITY SERVICE ORGANIZATIONS

United Way of Lewis County

CAPACITY BUILDING

Nisqually Land Trust
Mason Matters
Thurston Asset Building Coalition

EDUCATION

Yelm Dollars For Scholars
North Thurston Schools Educational Foundation
South Sound Reading Foundation
Thurston County School Retirees Association
United Way of Thurston County
NOVA School
Garden Raised Bounty (GRuB)
LOTT Alliance-Regional Services & WET Center
Sound Learning
Pacific Science Center
Centro Integral Educativo Latino de Olympia (CIELO)
Lacey Parent Cooperative Preschool
Eastside Cooperative Preschool
Mercy Housing Northwest

ROOF Rochester Organization of Families
Olympia School District Education Foundation
Evergreen State College Foundation
Morningside
Thurston County School Retirees Assoc.

ENVIRONMENT

Capitol Land Trust
Salish Sea Expeditions
Pacific Education Institute
South Sound Estuary Association
South of the Sound Community Farm Land Trust Fund

FAMILY SUPPORT

Society of St. Vincent de Paul, Centralia/Chehalis
A Gift for Special Children
Family Support Center
Family Education & Support Services
Parent to Parent
SafePlace
Turning Pointe Domestic Violence Services

HEALTH

Pope's Kids Place
Safe Kids Thurston County
Planned Parenthood of the Great Northwest
Senior Services for South Sound
Olympia Free Clinic
Rainier Therapeutic Riding
Chehalis Foundation
Olympia Union Gospel Mission
CHOICE Regional Health Network
Washington State Senior Games
Truly Motivated Transitional Living
PARC - Parks Arts Recreation and Cultural Foundation

HOUSING & HOMELESSNESS

Housing Options for Students in Transition (HOST)
Community Lifeline
Interfaith Works
Homes First!
Rebuilding Together
Mason County Shelter

HUNGER

Thurston County Food Bank
North Mason Coalition of Churches and Community

YOUTH DEVELOPMENT

Boys & Girls Club of Thurston County
TOGETHER!
Girl Scouts of Western Washington
YWCA of Olympia
Community Youth Services
YMCA General Campaign Fund
Fire Mountain Arts Council
Big Brothers Big Sisters of Southwest Washington
Pizza Klatch
Cispus Learning Center



**GENTLE YOGA AT
MASON COUNTY
SENIOR ACTIVITES
CENTER**

Our Funds

DONOR ADVISED

Gail Wyman Advised Fund
Gail Wyman Endowment Fund
Don Rhodes Family Fund
Kimberly Ellwanger Fund for Women & Children
Schorno Family Yelm Scholarship Fund
Chet Rhodes Family Chehalis Area Fund
Thurston County Women in Service to Children & Families Fund
Jack & Luellen Charneski Charitable Fund
Vannerson Family Advised Fund
Wubben Family Foundation
Edwards Brown Advised Fund
Charneski-L & E Bottling Co. Holiday Support Fund
Vannerson Family Endowed Fund
Parallel Fund
OHS Foundation Fund
Warjone Family Advised Fund
Dennis & Joan Peterson Family Advised Fund
Harold J. & Inge Marcus Donor Advised Fund
Rachel Corrie Memorial Fund
Robert and Lynn Brunton Family Advised Fund
Share It Now Fund

DESIGNATED PURPOSE

Dallas & Marguerite Edwards Yelm H.S. Scholarship Fund
Yelm High School Community Scholarship Fund
The Community Foundation Administrative Endowment Fund
William A. Lovett Fund
Peterson Family Building for Youth Fund
D. Michael Sharar Water Education Fund
Build for Tomorrow Fund
Patty Mulhern Fund for Nurses

AGENCIES

Concern for Animals Fund
Andy Crow Wurlitzer Organ Endowment Fund
Hands On Children's Museum Endowment Fund
Mason General Hospital Foundation Endowment Fund
Senior Services for South Sound Endowment Fund
Senior Services for South Sound/STARS Program Fund
Thurston Community Television Endowment Fund
YWCA of Olympia Women's Community Endowment Fund
United Way of Thurston County Endowment Fund
Pam Toal Leadership Fund

GENERAL UNRESTRICTED

Charles L. Trowbridge Memorial Endowment Fund
Coldwell Banker/Evergreen Olympic Realty Fund
The Community Foundation Program Endowment Fund
Irving A. Lassen Foundation Fund
Barbara McPherson Endowment Fund
Jack & Neddie Rose Farrington Endowment Fund

FIELD OF INTEREST

The Community Youth Fund
Thurston Mason Medical Alliance Fund
Thurston County Dental Access Network (TCDAN) Fund
Thurston County School Retirees Association Fund
The Community Foundation Disaster Relief Fund
Boistfort Valley Community Fund
The Community Foundation Fund for the Environment
Walter A. Bratton Business Week Scholarship Fund
Walter A. Bratton Youth Endowment Fund
Capital City Marathon Foundation Fund

SCHOLARSHIPS

Ellen Anderson deMoise Scholarship Fund
L & E Bottling Company Scholarship Fund
Learning Seed Foundation Scholarship Endowment Fund
North Olympia Fire District Association Scholarship Fund
OHS Foundation - Alfred Lewis Memorial Scholarship Fund
OHS Foundation - Chris Peters Memorial Scholarship Fund
OHS - Faculty Memorial Scholarship Fund
OHS Foundation - John G. Creighton Ex-POW Scholarship Fund
OHS Foundation - Laurie Callaghan Memorial Scholarship Fund
Remodelers Council - Cliff Tanasse Scholarship Fund
William & Dorothy Judah Scholarship Fund
Learning Seed Foundation Scholarship Fund

Cody Brown Memorial Scholarship Endowment Fund
Dan R. Montgomery Scholarship Fund
John & Opal McGimpsey Scholarship Fund
Kathryn M. Wolf Memorial Scholarship Fund
Griffin School - Tiernan-Keigher Scholarship Fund
Next Step Scholarship Fund
Washington State "Spirit of Youth" Scholarship Fund
Grade 13 Fund
Henry J. Melusky Memorial Scholarship Fund
Ecosystems Scholarship Fund
Amanda Winters Scholarship Fund

*BALLET NORTHWEST
PERFORMANCE OF
"COPPELIA"*





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