

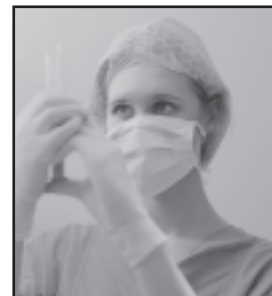
## \$24,500 in Scholarships Awarded to Local Nursing Students to Help Combat Severe Nursing Shortages in the County

Twelve local nursing students – who intend to practice in Ventura County upon completion of their studies – were awarded a total of \$24,500 in scholarships in January thanks to a three-year award program funded by a grant from the *Orfalea Fund* in Santa Barbara. These were the first round of scholarships awarded from the Fund, and we thank the *Orfalea Fund*.

The largest award, \$2,500, was presented to Dora M. Bernal-Lopez, a registered nurse who is pursuing a Master of Science in Nursing (MSN) at UCLA. The 11 other recipients, who each received \$2,000 scholarships, are: Dena M. de los Reyes of Ventura, Gracie D. Diaz of Oxnard, Van Nga Thi Nguyen of Simi Valley, Silvia G.

Ramos of Oxnard, Shelly L. Salvatore of Simi Valley, Michelle C. Santiago of Ventura, Sonya Servin of Oxnard, Toni M. Solis of Ventura, Clementine Turner of Ojai, Ashley S. Zavala of Ventura, and Candice Zimmerman of Westlake Village.

The *Orfalea Nursing Scholarships* provide financial resources for applicants with financial needs who have demonstrated the capacity for success in achieving a college education. Eligibility is contingent upon the expressed intent to practice in Ventura County.



highlights

## VCCF Awards Record Number of Scholarships

### \$600,000 Given to Local Students

In early June the Ventura County Community Foundation presented over \$600,000 in scholarship awards to deserving students at a reception hosted by CSUCI President Dick Rush and attended by more than 300 parents, students and donors. The evening reaffirmed a core belief that one of the best investments VCCF can ever make is in the future of hard-working students.



VCCF President Hugh Ralston with nursing student Genetrix Barasa, recipient of an *Orfalea Nursing Scholarship Award*, an *Eleanor Tillquist Scholarship*, and a *Charles J. and Kay Schuler Scholarship*.

The dollar amount of scholarships awarded this year represents a doubling from just a year ago and reflects both new memorial funds and new grants for specific programs. It also reflects an expansion of the *Basile Scholarship Fund* that permits renewable \$5,000 annual awards and the second round of the *Orfalea Nursing Scholarship* awards made to students pursuing nursing careers and funded by the *Orfalea Fund*. The *Orfalea Nursing Scholarships* provide financial resources for students with financial needs who have expressed intent to practice in Ventura County upon completion of their studies (see story on page 12).

“None of this would be possible without the many donors here in Ventura County who established funds with the express purpose of staking the next generation to a better future,” said Mary Schwabauer, chair of both the VCCF board as well as its Scholarship Advisory Committee. “From individual scholarships named in honor of a beloved and gifted math teacher, to funds that honor students pursuing careers in

engineering, music or agriculture, a legacy is created that can transform someone’s life and give them the means to create a future bright with promise and expectation.”

Of particular note, two sets of parents were on hand to give the first awards from funds established at VCCF in honor of a recently deceased child. Gary and Lori Frick, whose son Mike, a professional baseball player, was killed in an automobile accident on Thanksgiving 2003, handed out the first check to an athlete who has demonstrated the capacity to work in team sports. Tony and Carol DiRaimondo, whose son Michael was killed in Iraq last year, presented the first check from the *DiRaimondo Fund* which provides a full scholarship for a student interested in becoming a paramedic, a career that Mike had pursued with passion and performed admirably.

*continued on page 10*



### RETURN SERVICE REQUESTED

#### Board of Directors

Mary L. Schwabauer, Chair  
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Sally S. Yount, Secretary  
William H Bang  
Denis A. Dupuis  
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Scott B. Samsky  
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President and CEO  
Hugh J. Ralston

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## Smith Foundation Awards \$1.5 Million in Grants to Local Museums

The Martin V. and Martha K. Smith Foundation has awarded a \$1 million grant to the Seabee Historical Foundation to build a new Seabee Museum in Port Hueneme and a \$500,000 grant to the Ventura County Museum of History and Art's "Building for the Centuries" capital and endowment campaign.

The new, state-of-the-art Seabee Museum will include interactive exhibits that tell the story of the Seabees as never before. "The facility will be a landmark architectural addition to the county, the state and the nation," said Captain W.C. Hilderbrand, president of the Seabee Historical Foundation. "It will attract hundreds of thousands of visitors from across the country and will be a great economic asset to the area." The grant will be paid at \$200,000 a year for five years, matching gifts from other contributors.

The Museum of History and Art named a new Martin V. and Martha K. Smith Pavilion as a tribute to the Smith Family's legacy of dedication to the community. The Pavilion will be a large meeting space for lectures, programs and special events and is part of an 18,000 square-foot, \$7 million expansion of the museum facility in downtown Ventura. The project also includes new galleries, classrooms and public areas as



An artist's rendering of the new Seabee Museum that will be built in Port Hueneme.



Vickie Smith-Pozzi and John McConica, Ventura County Museum of History and Art board chair.

well as new housing for the museum's extensive archive, library and collections of artifacts and artworks.

"We are very pleased to be selected by the Martin V. and Martha K. Smith Foundation to receive this incredible gift," said Museum Executive Director Tim Schiffer. "Their contribution to this campaign will make an important difference to the people of Ventura County and Southern California by ensuring that there is an important cultural space where the community can gather, learn and enjoy their county's history and art."

The Martin V. and Martha K. Smith Foundation, a support organization of VCCF, was established by Martin "Bud" Smith and his wife Martha, leading land and business developers in Ventura County for more than 50 years. Joining VCCF in 1994, the Smith Foundation funds nonprofits in Ventura County through an annual grant program projected to be \$1 million. The Smith Foundation was fully funded in December 2004 with a bequest of more than \$16 million. In 2005, the Foundation has chosen to focus grant making in the following areas of interest: arts and culture, emergency services, senior services, and community development.

## At the Foundation

### Congratulations . . .

**S**usan Clements has been promoted to director of donor relations. Clements, formerly the executive assistant to the president, brings a varied background to this important position, including two years of service at Santa Clara High School as the director of development. Her extension at VCCF is 15.



**K**aren Schmidt has been hired as a part-time project coordinator for the Civic Alliance, an initiative of the Community Foundation. Schmidt is a graduate of Stanford University and the Kellogg School of Management at Northwestern University. In addition to her work as a consultant, which included six years with Booz Allen, she serves as the part-time executive director of SOAR. Her extension is 22



**M**onica Mejia joins VCCF as a new program officer. Mejia brings more than seven years of leadership experience in affordable housing and project management. In this new role, Mejia will work with three of VCCF's funds – *Destino: The Hispanic Legacy Fund*, the *Women's Legacy Fund*, and the *Ventura County Fund for Farmworker Housing*. Her extension is 21.



**S**andra Velasco joins VCCF as executive assistant following nine years with the California Endowment in Woodland Hills in various executive assistant roles. A resident of Oxnard, she brings both experience and good humor to VCCF's staff. We are delighted she has joined us. Her extension is 11.

### ...and Best Wishes

**D**onna Logan, most recently vice president of finance, announced her departure from VCCF in January 2005, ending a decade of service to the Foundation. At a reception in her honor, VCCF President Hugh Ralston thanked Logan for her dedication during which time the Foundation increased in size tenfold. Sharing a resolution passed unanimously by the board of directors, he noted their thanks for her years of service and their belief that her contributions had helped Ventura County through "countless grants made over the past decade, organizations strengthened by new endowments which now

thrive, programs launched with grant monies made in confidence to VCCF, and students whose lives have been forever marked by VCCF scholarships."

**G**race Padilla Kastenberg, the Resource Center's first full-time director, submitted her resignation in May, announcing that she had accepted the position of director of community grants at the Amgen Foundation. "We are sorry to lose Grace's enthusiasm but welcome her continuing work as a colleague investing in the future of Ventura County," noted VCCF President Hugh Ralston.

## Mary Leavens Schwabauer Honored

Mary Leavens Schwabauer, the Foundation's fourth board chair, was honored at a reception on March 31 at Spanish Hills Country Club. In addition, former board chair Bill Bang and his wife MaryAnn were thanked for their leadership of VCCF and their longstanding advocacy of philanthropy in Ventura County. Former directors Bill Hart and Dotti Loebel were also honored for their 12 years of service, the maximum permitted.



Mary Schwabauer and Bill Bang

MaryAnn and Bill Bang

### VCCF Awards...continued from page 1

Each of the other memorial funds at VCCF holds a similar legacy dear to those who have contributed to the fund. "We are honored to be able to preserve and extend these legacies in the years ahead," said Schwabauer. "It doesn't remove the sorrow but helps preserve the memory, and it provides a small measure of grace in seeing these awards transform lives."

As the Foundation approaches its 12<sup>th</sup> anniversary of scholarship awards, VCCF continues to be privileged by the tremendous growth in these funds that now exceeds \$13 million. "In our first year, our first awards were \$5,000 in total and members of that first scholarship committee were frustrated at the inability to help so many terrific students," noted VCCF President Hugh Ralston. "\$1.7 million later, we have helped hundreds of students transition a critical step."

While the money is important, and often a decisive factor that makes higher education a real option, there is another benefit this communal investment creates. That is the

feeling recipients get by knowing that others believe in their future. Such belief often helps cushion the bumps that life has in store and keep these students focused on being worthy of that trust and belief. It also encourages them to look for ways to repay what others saw in them as they develop the means to do so.

"As our thoughts move from graduation to the diversions of summer ahead, we are thrilled that the investment in these students will be paying dividends for years to come," said Schwabauer. "And that is indeed something to celebrate!"

"In addition to saluting the scholarship winners, we salute the scholarship staff at the Foundation who navigated this process with focus and dedication, carefully considering a record 3,400 applicants, a threefold increase from last year," said Ralston. "Our thanks as well go to all of the community volunteers who reviewed the applications, joined scholarship committees, and worked hard to ensure that a thoughtful and fair process was carried out."

## Donors Award \$120,000 to Support Farmworker Housing

VCCF's Merewether Community Fund has awarded a \$120,000 grant to the Cabrillo Economic Development Corporation (CEDC) to help fund a new 24-unit housing project for low-income farmworkers. The Vista Hermosa development will be located near the corner of Palm and Harvard in Santa Paula and is scheduled to start construction in September 2005.



Mike Merewether (right) presents check to Rodney Fernandez, executive director of the Cabrillo Economic Development Corporation.

The Merewether Community Fund is a \$600,000 fund that was established two years ago by Mike and Loretta Merewether with a donation of appreciated real estate. "It is great to have a part in helping direct the funds to worthy causes in our own community while we are still living," said Mike Merewether, an active member of the City of Ventura Farmworker Housing Committee. "Agriculture is a big economic driver in our county, and we have a moral obligation to provide decent housing for some of the lowest paid and hardest working individuals in our community."

The Foundation is pleased to support organizations like CEDC that are working to find solutions to agricultural workers' housing issues in Ventura County. In 2004, VCCF granted more than \$200,000 from the Ventura County Fund for Farmworker Housing to support safe, decent and affordable housing for farmworkers. CEDC was one of the recipients of those grants for its Solo Cup and Casa Campesina farmworker developments in Santa Paula and Oxnard, respectively.

### New Director Joins VCCF



Dena Jenson joins VCCF as our new director of the Resource Center for Nonprofit Management. She comes to us with more than ten years of experience in nonprofit management including board and fund development. Prior to VCCF, Dena served as program and public policy director at the Perinatal Advisory Council. Dena received her undergraduate degree in political science from Cal State Long Beach and her master's degree in public policy from USC. Welcome!

### Resource Center Offers E-News, Seminars and Workshops

The Foundation's Resource Center for Nonprofit Management provides training, research materials and technical assistance to nonprofit organizations in Ventura County with the goal of strengthening the ability of those organizations to deliver needed services in the community. The Resource Center is the only management training center for nonprofit organizations in the county. For up-to-date information on workshops, funding and resources for nonprofits, subscribe to the Center's free nonprofit e-newsletter. Log on to [www.vccf.org](http://www.vccf.org), click on Resource Center for Nonprofit Management and sign-up today!

## Donors Recommend \$475,000 in Grants in 2005; \$3.8 Million in Grants Over 5 Years.

VCCF has granted over \$475,000 from donor advised funds in the first six months of our fiscal year through March 31, 2005. Over 80 percent of these grants came from endowment funds established at the Community Foundation, further extending the initial donor contributions well into the future, to the benefit of Ventura County nonprofits.

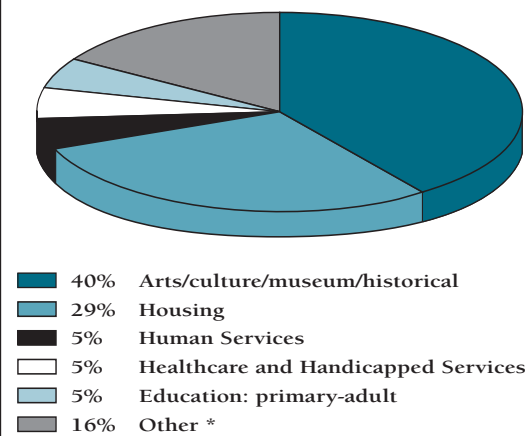
Since October 2004, 40 percent of these grants went to arts and cultural institutions, including museums and historical societies, with housing and healthcare service nonprofits taking the second largest share. The average sized grant is \$4,593.

In the last five years, 1,025 grants have been awarded from VCCF donor advised funds for a total of \$3.8 million; 254 grants have been \$500 or less, with 454 grants made between \$500 and \$2,500. Program areas that donors have chosen to fund include arts and culture (25 percent), education (16 percent), recreation (15 percent) and general support (10 percent). Other concentrations of program support include healthcare services, human services, housing and religious development.

“VCCF looks at donor services as a key element of the work of the Community Foundation, and we welcome our role as a partner with donors to support the organizations and causes they hold most closely,” said Director of Programs and Grants Tina Knight. “We are proud of our record of support for Ventura County nonprofits over the years, knowing that this is a critical element of financial health for many worthy programs that serve so many and a key donor priority.”

### FY 2005 Donor Advised Fund Grants

Percent of Grant Dollars by Program Area Year To Date



\* Other includes mental health, homeless services, recreation & sports, religious development, civil rights, legal aid, and outside scholarships program support.

Fund Contributions: Due to the volume of individual donations and contributions to VCCF funds and programs since our last newsletter, we are unable to list all of our donors in our quarterly newsletters. Please look for a listing in our upcoming 2005 annual report and, later this summer, on VCCF's Web site at [www.vccf.org](http://www.vccf.org). We thank you for your generous support of the good work of the Community Foundation in Ventura County.

## Civic Alliance Hosts Second Annual Conference on Growth

More than 300 people attended “The Road Ahead 2,” the second annual growth conference sponsored by the Ventura County Civic Alliance; California State University, Channel Islands; and the *Ventura County Star*. The purpose of the conference was to propose strategies to address the challenges that lie ahead, building on last year's successful conference.



Community leaders discuss growth and sustainability strategies proposed by the Civic Alliance at The Road Ahead 2 conference.

“As our region copes with a rising population and diminishing building space, it's important to bring together residents, organizations and politicians to discuss these issues,” said Civic Alliance Chair Stacy Roscoe. “There is much to be said about the power of a strong community. Together we can help implement positive change and ensure a healthy future for Ventura County.”

Last year's conference illustrated trends ahead such as the population growth to an estimated one million people in Ventura County by 2020; increasing traffic congestion; the fact that new land for housing will be gone in many cities by 2009; there are few housing options for young families and average-income workers; and four out of five families in general are unable to buy a median priced home.

This year, the Ventura County Civic Alliance presented its four strategies to encourage long-term sustainability. First and foremost, the Alliance recommended that Ventura create a “compact” – a common vision, goals and

principles that reflect a positive future for Ventura County and draw a road map for getting there for all interested parties. Secondly, it encouraged communities to learn about ways to develop land with mixed-use neighborhoods near transportation links, which include housing for all income levels, ages and family structures to live together in a livable community. Another strategy was to enhance the balance between long-term development of jobs and the housing need to support local jobs. Finally, in order to thrive, the workforce in Ventura County needs to be better trained.

“This year's conference was a worthwhile meeting to develop and implement the beginnings of strategies that will make a difference,” said Roscoe. “The journey does not stop here. Much more work is yet to be done.”

## Destino Awards \$102,000 in Grants

*Destino: The Hispanic Legacy Fund* awarded \$102,880 – its largest annual grants total ever – to various community groups whose work improves the lives of Latino men and women in Ventura County. The grants were announced at Destino’s awards ceremony on April 21 at the Derby Club at Seaside Park in Ventura.

This year Destino’s grant making was focused on family health and youth success opportunities for Hispanic men, women and children. The funds were allocated in many different directions to serve comprehensively all aspects of the community. This year’s grant pool was augmented by \$50,000 from The California Endowment as part of a multi-year investment in Destino and in improving health literacy among Ventura County Latinos.

The largest grants were in the amount of \$15,000 each and were awarded to:

- 1 **The Wellness Community for its Spanish-language Latino cancer support program.**
- 2 **Services United, to establish the Fillmore and Piru Family Resource Center.**
- 3 **Interface Children Family Services, for its CONVIVIR Family Health & Well-Being Services.**

Other awards included: \$10,000 to El Concilio del Condado de Ventura for its Breakthrough Youth for Success program; \$9,800 to City Impact for its Community Solutions Mental



(left to right) Hank Lacayo, chair of the Destino Vision Committee; keynote speaker Andres Irlando, president of the Cesar E. Chavez Foundation; and Tim McCallion, president of Verizon and VCCF board member.

Health Project; \$8,000 to Westminster Free Clinic for its Mental Health Counseling Program; and \$5,000 each to Camarillo Hospice for its Latino Access Project and Mixteco/Indigena Community Organizing Project to support Bebe Sano Infant Care classes for Mixtec parents.

An additional \$20,000 was awarded to financial literacy programs. Those funds come from an initial grant from Countrywide Financial Corp. for Destino’s Latino Literacy Initiative.

Destino received 24 eligible proposals adding up to be \$276,043 in requests, illustrating the great need in the community for backing of programs to support the Latino population. For more information about *Destino: The Hispanic Legacy Fund*, call (805) 988-0196.

## Nonprofits: A \$1 Billion Ventura County Industry

A new study released earlier this year by the Center for Nonprofit Management in Los Angeles and the Gianneschi Center for Nonprofit Research at California State University, Fullerton, shows that Ventura County is home to a \$1 billion nonprofit industry. VCCF was a sponsor of the study.

The report, entitled “Southern California’s Nonprofit Sector,” presents detailed information on seven Southern California counties with regards to the following service categories: arts, culture and humanities; education; environmental and animals; health; human services; and religious. The purpose of the study is to help nonprofit leaders, donors and policymakers in allocating resources to help Southern California communities. It does not include nonprofits with less than \$25,000 in revenue or religious organizations.

According to the study, Ventura County has the highest per capita family income (\$65,285) and the lowest poverty rate of the seven Southern California counties studied. In nonprofits it has:

- ★ \$1 billion in revenues, including \$238 million in contributions.
- ★ \$1.2 billion in assets.
- ★ \$932 million in expenses, including \$354 million in personnel expenses.
- ★ 6.07 nonprofits per 10,000 residents (about average for Southern California).



The Ronald Reagan Presidential Foundation is one of the ten largest nonprofit organizations in Ventura County. It sustains the Ronald Reagan Presidential Library and Museum (above) in Simi Valley.

- ★ Education’s share of nonprofits is the largest in the region; health and human services are among the lowest.
- ★ Median non-profit revenues of \$104,885 and median assets of \$57,738 among the lowest in Southern California.

Of particular note was that 70 percent of the nonprofit revenues reside within only ten organizations. Additional details or copies of the study are available through VCCF’s Resource Center.

### Strategic Plan Nears Completion

VCCF’s board is bringing to a close a yearlong strategic planning process with details expected by September. Included in the plan is a refinement of our mission statement, “to promote and enable philanthropy to improve our community for good and for ever,” and adoption of a new five-year effort to fulfill VCCF’s mission. Look for more details in our next newsletter.

*The Ventura County Community Foundation:  
Investing in Ventura County For Good For Ever*

## Medical Education Fund Established With Tobacco Settlement Distribution

A new *Medical Education Fund* that will be used to extend forgivable loans for students wishing to pursue careers in nursing and other medical fields has been established at VCCF and seeded with a \$750,000 distribution of tobacco settlement funds by the Ventura County Board of Supervisors. The supervisors approved the disbursement of these funds in May 2005 for the purpose of training and assuring the availability of much-needed nursing professionals in Ventura County.

“The creation of this program fulfills a key mission goal of putting capital to work in Ventura County,” said VCCF Board Chair Mary Schwabauer. “Our thanks to the board of supervisors for their vision in making this partnership a reality.”

The *Medical Education Fund* will build upon the current VCCF Nursing Scholarship Program by providing forgivable loans to students who

wish to study at either a local community college or at a four-year university in Southern California. Loans are expected to be \$2,000 – \$4,000 each, based on the program the student is taking. Each student will sign an agreement to agree to work in Ventura County for at least two years following the completion of their studies, at which point the loan will be forgiven. If the student does not work in the county, the loan must be repaid to the Fund.

Guidelines for the loan program will be established by an oversight committee, consisting of healthcare professionals, community leaders and volunteers. Additional funding for the program will be coordinated by a fundraising committee. The first loans from the program should be distributed later this year, with the first annual amount of \$37,500 in loans available in the spring of 2006. See [www.vccf.org](http://www.vccf.org) for details.

## VCCF Salutes its Staff with Leadership Awards



From l to r: Susan Seale, Donna Hall, Clare Brown, Claudia Sanchez and Talon Klipp.

Congratulations to the following VCCF employees who received our Staff Leadership Award, a quarterly commendation recognizing

outstanding effort and leadership above and beyond job responsibilities. “We are pleased to recognize the outstanding jobs our colleagues are doing as we translate donor contributions to programs, grants and scholarships,” said VCCF President Hugh Ralston. “We are very proud of each of them.”

Donna Hall (1st quarter 2004)  
Talon Klipp (2nd quarter 2004)  
Claudia Sanchez (3rd quarter 2004)  
Susan Seale (4th quarter 2004)  
Clare Brown (1st quarter 2005)

## VCCF Creates Tsunami Relief Fund and \$9,000 Challenge Grant



Concerned community members donated more than \$18,000 to VCCF's *World Disaster Fund* to assist the relief efforts aiding the victims of the December 26, 2004 tsunami in Southern Asia. The Fund was established to provide a vehicle for local donors to reach out to victims and was seeded with a \$9,000 challenge grant from the Foundation's *Special and Urgent Needs (SUN) Fund*.

“The magnitude of this natural disaster was breathtaking,” said VCCF Board Chair Mary Schwabauer. “Our Foundation did what we could by providing a safe and effective way for members of our community to support the

relief efforts going out to the thousands of families and children whose lives were devastated by this unbelievable tragedy.”

All contributions made through the VCCF *World Disaster Fund* were distributed to support the international relief efforts of the American Red Cross, the Salvation Army and Direct Relief International. “We were pleased to be able to provide funds for this truly special and urgent need and appreciate all the contributions made by members of the Ventura County communities,” said Schwabauer.

## Investment Performance

### VCCF Endowment Performance Summary (as of March 31, 2005)

	Last Quarter	Fiscal YTD	Last Year	Last 3 Years	Last 5 Years	Last 10 Years	Since Incep.*
Total Fund Composite	(0.6)	7.0	6.3	7.7	5.4	10.4	9.8
Custom Index	(1.3)	6.3	6.2	6.0	1.4	9.0	8.7
Manager Index*	(1.0)	6.7	6.1	7.0	3.0	10.0	9.3

\* The Manager Index is composed of the Russell 3000/Lehman Bros. Aggregate Bond/MSCI EAFE components based on the actual allocation percentages of the Total Fund.

### Manager Allocation Summary (as of March 31, 2005)

