



2021-22  
ANNUAL  
REPORT

# where giving grows



Board Chair, **Paulette Brown-Hinds, Ph.D.**



President and CEO, **R. Michelle Decker**

We are delighted to share our 2021-2022 Annual Report with you, our partners on the journey of making the Inland Empire a just and generous region. In our 80th year of operation, we think celebrating our incredible past also requires that we look to the horizon and IECF's role in the Inland Empire.

The past year, we emerged from the effects of COVID and navigating a new world of work, partnerships, and community needs. The pandemic showed us what racial, gender, and economic inequity looks like in stark numbers, as well as in personal experiences. Equity is a broad term, but in its most fundamental form, seeking it demands that we answer the question, "Who is most affected by a problem?" To solve it, we ask, "How do we empower and invest in those most affected to make the lasting changes they need?"

In 2021, we wrote a plan for expanding our charitable giving efforts. Our Board embraced the idea that we must use the foundation's assets and abilities to grow a "culture of philanthropy" in the Inland Empire. In this report, we explain how our 80th anniversary campaign primes the pump for what we envision is a long-haul effort to develop the permanent philanthropic resources the Inland Empire needs.

A culture of philanthropy will be built with equity at the forefront, in partnership with our nonprofits and our cherished donors. With these ingredients – plus a level of policy and advocacy to attract more resources – our future is filled with the promise of positive, transformative, and community-led change.

IECF brings to this vision a wealth of tools, knowledge about the Inland Empire and its nonprofits, and innovative thinking about the role philanthropy can play. We hope you enjoy the stories of heroes and helpers, investors, and builders – and that you see yourself reflected in the work we do. We look forward to continuing our relationship with you, because your ability to share this vision with others will help ensure that the Inland Empire has the resources it needs for generations to come.



# 80 YEARS OF IMPACT



**1941**

Riverside banker and civic leader Charles Emory Brouse establishes The Riverside Foundation, an endowment envisioning student access to education at Riverside City College.

**1947**

Charles Brouse dies, leaving a legacy of philanthropy and a funding structure that will grow for years to come.



**1950s**

The foundation provides scholarships for students to attend Riverside City College and University of California, Riverside.

**1960**

The foundation contributes more than \$1 million to University of California,



Riverside from endowed scholarship funds and grants and begins another decade of helping students achieve their dreams.

**1979**

The foundation expands its focus beyond education, changing its name to **The Riverside Community Foundation**.

**2000**

Wanting to make a positive impact on communities beyond the city of Riverside, the foundation adopts The Community

Foundation name with the tag line "Serving Riverside and San Bernardino Counties."



**2004**

Philanthropist and civic leader Peggy Fouke Wortz

donates \$4 million, the foundation's largest gift to date. The granddaughter of the inventor/founder of Oldsmobile served on numerous community-oriented boards, which included a position as president of the foundation board. (She died in 2008.)

**2009**

The foundation launches a Youth Grantmakers



**The Community Foundation**  
Serving Riverside and San Bernardino Counties

What began as a fund to help students get into Riverside City College evolved into a resource to fill myriad community needs in two counties. As this timeline shows, IECF's activities accelerated after the millennium – which can be rightfully interpreted as its increased abilities to address the Inland Empire's challenges.

program to cultivate philanthropy among young people.



## 2011

The James Irvine Foundation grants the foundation \$500,000 for its regional leadership initiatives.

## 2012

The S.L. Gimbel Foundation makes a gift of nearly \$4 million, almost doubling its prior-year gift.



## 2014

The foundation's Give BIG San Bernardino County and Give BIG Riverside County web-a-thons collectively raise \$953,000 for 426 nonprofits.

## 2018

The foundation welcomes new President and CEO R. Michelle Decker, involved for 27 years in regional economic development and nonprofits cultivation. The board chose the Ohio resident above more than 60 candidates.



## 2019

The foundation changes its name to Inland Empire Community Foundation to inspire collaboration in the inland Southern California region.



## BLACK EQUITY INITIATIVE

## 2020

The IE Black Equity Initiative establishes the IE Black Equity Fund.

The foundation creates the IE COVID-19 Resilience Fund, raising more than \$800,000 and making 63 grants to Inland Empire nonprofits for their operations – indeed, survival – in the face of a pandemic. It further administers \$10 million in COVID-related financial

support through county assistance funds.



Through Census IE and the Census 2020 Pooled Fund, IECF awarded \$3.3M in grants to CBOs for Census awareness and outreach activities.



## 2021

The foundation names Dr. Paulette Brown-Hinds as chair of its board of directors. And in marking its 80th anniversary, the foundation announces a slate of Signature Funds, each of which will raise \$80,000 in their inaugural year to address pressing issues in the region.



# 2021-22 Highlights

IECF marks success in a spectrum of noteworthy moments.

**Dr. Paulette Brown-Hinds** was elected chair of IECF's Board of Directors. The founder of Voice Media Ventures and publisher of VOICE and Black Voice News, has served on the foundation's board for seven years, including a term as vice chair, as well as on the boards of The James Irvine Foundation, American Press Institute, California Press Foundation, CalMatters, and California News Publishers Association.

A \$2.7 million grant from The James Irvine Foundation provided the impetus for the **Just San Bernardino Collaborative** (Just SB) to embark upon a People's Plan for Economic Inclusion.



*Participants at the 2021 virtual Policy & Engagement launch event learned how nonprofit leaders are collaborating with IECF to promote five policy priorities: education equity, inclusive economic development, housing, health, and the environment.*

The Kresge Foundation awarded a \$140,000 grant to **Inland Empire Growth and Opportunity**, a project housed within IECF to grow business sectors that can provide quality jobs for the region. Such targets include sustainable goods movement, green technology, advanced manufacturing, and cybersecurity. The funds support a new executive director position for IEGO, as well as mapping and connecting nonprofit community organizations with workforce development initiatives.

IECF launched its **Office of Policy & Engagement** and hosted a virtual event with more than 300 elected officials, community partners, and philanthropic leaders discussing ways to advocate for the Inland Empire. The event underscored the importance of regional collaboration with local, state, and federal policymakers representing the Inland Empire. IECF is organizing workshops and policy strategy sessions to prepare for the 2022 legislative and budget cycle.

As promised during its launch, the Office of Policy & Engagement, in conjunction with IE Community Collaborative, hosted four workshops to help organizations advocate for change and apply for state and federal resources. Two of the workshops concentrated on effective engagement and advocacy strategies in the legislative and budget processes. The other two focused on grant writing tools and strategies for pursuing government funding.

The first round of grants from the **IE Black Equity Fund** – each ranging from \$10,000 to \$75,000 (totaling \$740,000) – benefitted 16 Black-led nonprofits.

*IE Black Equity Fund grants support nonprofits that address “learning,” “emerging,” and “scaling up.”*







*Just SB spent its first year developing strategies in response to disparities in education, health, housing, and employment and wage equity in the Inland Empire.*

Applications from 50 organizations reinforced the need for this resource. The granting process also facilitated the sharing of information

about additional funding opportunities and resources for all the groups that applied.

S.L. Gimbel Foundation added \$7 million to the **S.L. Gimbel Fund** that IECF has stewarded since 2010. The contribution was the largest gift made to the fund established to advance the meritorious causes of Susan Gimbel: food insecurity, education, the environment, and human dignity. Under IECF management, the fund has granted \$11 million over the past year.

IECF announced the new **Rohn Rookstool Veterans Fund**, a “field of interest” fund to benefit San Bernardino County veterans in need of legal aid services, housing, and physical and mental health services. “Rohn Rookstool believed in using money, carefully saved over a lifetime, for donations to worthy organizations and causes that aligned with his values,” says Bill Lemann, Partner at Fullerton, Lemann, Schaefer & Dominic, LLP. “He was honored to leave funds from his estate to assist veterans who sacrificed so much for our nation.”

The **Community Impact Fund** issued grants between \$5,000 and \$20,000 to 40 Inland Empire nonprofits (for a total of \$589,500). Recipients represented a gamut of interests, including children and families, seniors, health, education, the environment, and the arts. All recipients demonstrated a commitment to diversity, equity, and inclusion.

IECF kicked off the online **IE Giving Hub** to connect nonprofits and donors. The hub allows organizations to promote themselves with profiles and key information. Donors and volunteers can learn which issues nonprofits are working on and give and volunteer all in one place.

Celebrating 80 years of giving in the Inland Empire, IECF heralded a lineup of eight **Signature Funds**, each directed to raise \$80,000 in their inaugural year. Several board members stepped forward to establish and champion funds in critical areas of special meaning to them.

*IECF's Community Impact Fund awarded almost \$600,000 to 40 Inland Empire nonprofits that prioritize diversity, equity, and inclusion.*



# You Name It!

Inland Empire Community Foundation heralds Signature Funds in recognition of the past, the present, and the future.

A history of 80 years deserves not only to be celebrated but also to be made especially meaningful as a catalyst for new initiatives. In 2021, Inland Empire Community Foundation identified eight Signature Funds through which it can positively impact the residents of Riverside and San Bernardino counties.

The **Arts for the IE Fund** supports arts organizations and helps them connect with their communities and funding possibilities. Board member Ann Sheffer seeded and chairs this fund. Under her informed guidance and with contributions from the greater community, IECF will enable arts organizations to advocate locally and statewide, create partnerships to increase access to the arts by underserved populations, and build equitable cultural leadership.

The Inland Empire **Black Equity Fund** (in partnership with the Inland Empire Black Equity Initiative and Inland Empire Funders Alliance) advances the missions of Black-led and Black-empowering organizations through program and project support and capacity building. This fund was seeded by IECF and The California Endowment.

The **CIELO Fund** empowers Latinos in our communities by uplifting and investing in organizations and initiatives led by and serving Latinos in the region. With “cielo” being the Spanish word for “sky” and the all-caps anagram standing for Cultivating Inland Empire Latino Opportunity, no one should miss the soaring goals of the fund. Board Member Jesse Melgar, who has spent his career in the halls of the state capital and advancing public policy, chairs the fund.

The **FRieNDS of Veterans Fund** offers grants to help veterans residing in Riverside and San Bernardino counties whose needs include legal aid, housing, and physical and mental health.

CIELO  
FUND





# ARTS FOR THE INLAND EMPIRE FUND



The **Here for Good Fund** supports IECF operations and helps the foundation take leadership on multiple issues. It was established in 1992 and remains a vital resource in ensuring the foundation can achieve its goals and meet the moment. The foundation could not put its attention on all the above Signature Funds without including HFG, which provides capacity for success.

The **Journalism and Media Fund** supports Inland Empire journalism and media outlets and supports the pipeline of talent in this sector. In these days of rampant disinformation and loss of local journalism, it is essential to cultivate reliable sources of news based on fact and integrity. This fund is seeded and chaired by Paulette Brown-Hinds, IECF board chair, as well as founder of Voice Media Ventures and publisher of Black Voice News.

The **Salton Sea Fund** supports the social, economic, and environmental resilience of the Salton Sea and its surrounding communities. Board member Jeremy Hobbs has worked for dozens of water districts in California, holds a law degree, and is a founder/president of Western Wind Foundation. He seeded and chairs this fund, because he understands how vital environmental issues are to healthy communities.

The **Women's Giving Fund** educates women on philanthropy and provides grants to Inland Empire nonprofits that address critical quality-of-life issues for women. Started five years ago, this fund is chaired by the board's vice chair, Nefertiti Long, who has used her professional expertise in finance to assist multiple charitable organizations.

Visit [iegives.org](http://iegives.org) to learn about the benefits of your contribution to one or more of these funds.



# HERE FOR GOOD FUND



# WOMEN'S GIVING FUND

# Building Equity

Communities thrive when investments embrace fairness, diversity, and inclusion.

Though IECF's principles always have been grounded in fairness and inclusion, we took aim in 2020 at strengthening and centering our commitment to equity when our Board of Directors adopted equity – racial, gender, and economic – as the lens by which we will develop programs, partnerships, and grantmaking. When we look at data, we see clearly where disparities exist and for whom. Donors and fund holders serve as essential partners in our efforts to provide greater self-determination, health, and opportunity for the powerfully diverse Inland Empire population. We are acutely aware that positive change for those most impacted by systems that have ignored racial, gender, and economic disparities must happen more quickly.

We had already started practicing trust-based philanthropy, an

*"We listen to people impacted by our actions and incorporate their experiences into our decisions."*



ReWritten

approach that addresses inherent power imbalances between funders, nonprofits, and the communities they serve. Intentionally putting more trust into the grantmaking process redistributes power and builds relationships based on transparency, dialog, and mutual learning.

In 2021, we deployed our emerging equity framework through our **Community Impact Fund** by transforming discretionary grantmaking from capacity building to supporting the Diversity, Equity, and Inclusion (DEI) journeys of our nonprofits. Grants were provided to Inland Empire nonprofits, collaboratives, and coalitions whose missions, governance, staffing, and joint-



PHOTO COURTESY OF POWER SPEAKS LOUDER

Power Speaks Louder





Coachella Valley  
Rescue Mission

venture relationships prioritize DEI and its role inside their organizations and externally in the communities they serve. In 2022, the initial round of grants from this fund awarded \$589,500 to 40 nonprofits.

The foundation's focus on social justice included IECF and The James Irvine Foundation supporting the formation of **Just San Bernardino**, or Just SB, a collaboration involving community-based organizations interested in shaping a human-centered economy. The project began with developing strategies in response to historic and growing disparities in education, health, housing, and employment. The resulting People's Plan for Inclusion launched in March 2021 with a \$2.7 million Irvine Foundation grant. In March 2022, Irvine issued a three-year grant of \$9,345,000 to support the continued operation and development of the coalition.

Increasing our resources for uplifting all people of the Inland Empire, the Bill & Melinda Gates Foundation in May 2020 provided the financial resources to fulfill IECF's Educational Equity Initiative. The grant of \$1 million over two years



Mizell Center





*"Intentionally putting more trust into the grantmaking process redistributes power and builds relationships based on transparency, dialog, and mutual learning."*

was invested in nine community-based organizations working on educational issues, including curriculum development and teacher training. It allowed IECF to hire a director of policy and governmental affairs to elevate community voices in educational reform and equitable achievement in K-12 systems.

Formed in 2020, the **IE Black Equity Fund** completed its first historic round of grantmaking. In September 2021, the Black Equity Initiative of the Inland Empire, in partnership with IECF and the IE Funders Alliance, invited nonprofits to apply for one of three tiers of IE Black Equity Fund grants geared toward core support of Black-led organizations. With the BEI's mission to end systemic racism and build economic and political power for the Black community, this inaugural round of 16 grants totaled \$740,000. Recipients fell into three categories: "learning" (organizations new to systems change), "emerging" (organizations with three or fewer years of experience in systems change), and "scaling up" (organizations with momentum in successful systems-change work).

COVID-19 also exacerbated inequities and heightened need among historically underrepresented students, including low-income students, girls, and students of color. To combat these discrepancies, IECF received a \$2.7 million through the **Expanded Learning Advancing**

Youth Mentoring  
Action Network



Boys & Girls Clubs of Coachella Valley

**Educational Equity Program** to expand learning and advance educational equity for students ages 5 to 19 residing in San Bernardino County. In the summer of 2022, IECF awarded \$1,162,900 to 10 organizations with before- and after-school programs to help address learning loss and gaps caused by the pandemic. Most recently, IECF secured supplemental funding through the Helen and Larry Hoag Foundation to strengthen similar programs benefitting students in Riverside County.



# Leading Change

## IECF Forms Office of Policy & Engagement to Advocate for Nonprofits

After decades of working with local and regional nonprofits, IECF launched the Office of Policy & Engagement (OPE) in July 2021 to build “policy capacity” in the region. “Our goal is to support nonprofits to ensure they have a voice in the decisions that directly impact the constituents they serve,” says Julian Cuevas, Director of Policy & Governmental Affairs. “We want to be a vessel that helps advocate and steward their ideas and priorities in the legislative and budgets processes.”

Per capita investment by philanthropic foundations is \$262.99 statewide versus \$25.55 in the Inland Empire, according to a report by Funders Alliance of San Bernardino and Riverside Counties. A component of the OPE resides in encouraging donors and fund holders to invest in its five priorities: education equity, inclusive economic development, housing, health, and environment.

Among the first-year “tangible wins,” Cuevas counts a \$200 million allocation in California’s 2022-2023 budget to expand dual enrollment opportunities, Riverside County earmarking \$16 million of American Rescue Plan Act funds for direct assistance to nonprofits, and the development of the Inland Empire Children’s



Cabinet, in partnership with the Inland Empire Community Collaborative, that was supported through a grant from the Bill & Melinda Gates Foundation toward early childhood education.

The OPE also holds workshops and policy strategy sessions to help nonprofits understand how the legislative and budget processes work, and then putting the learning into action. Its annual forum brings together elected officials with community stakeholders to promote regional collaboration on priority issues.







## Youth Grantmakers Program Plants Seeds for Giving

Because IECF envisions a diverse, equitable, and inclusive region that can be sustained into the future, it must inspire philanthropy and civic engagement among young people. Youth Grantmakers cultivates critical qualities and skills in tomorrow's leaders. Learning by doing is an ideal way to help youth identify and address needs in their communities so they can award grants that support the work of local and regional nonprofits.

***"This program has given me a voice. As youth we are often times looked over, but this program has provided me the opportunity to speak up on our behalf."***

**– Carmen Guzman, participant**

During the 2021-2022 school year, 33 students from 16 high schools awarded \$30,000 in grants. They discussed community issues and analyzed grant applications to reach consensus on where funds would have the most impact for youth.

As an example, this year's Youth Grantmakers awarded \$2,500 to Project Fighting Chance, a San Bernardino nonprofit whose mission is to reduce aggression and trauma among youth through a boxing program that includes mentoring, homework assistance, and adjunct activities including arts and horticulture.

The Youth Grantmakers also awarded \$1,000 to Rancho Cucamonga-based Magdalena's Daughters, which is committed to transforming the lives of sexually exploited and at-risk females.

Youth Grantmakers gives our bright beacons of tomorrow the opportunity to become active agents of change.

# Creating an Inclusive Economy

Inland Economic Growth & Opportunity builds bridges to address a regional lack of quality jobs.

With equity and collaboration being cornerstones of its framework, IECF took a lead in sponsoring Inland Economic Growth & Opportunity (IEGO), a network of almost 70 community-based organizations, businesses, schools and universities, and governmental entities on a mission to increase the number of well-paying jobs to sustain families. After an initial February 2019 report, IECF secured several grants to support IEGO, including the hiring of its first executive director, Jackie Melendez, who stepped into the role in January 2022.

"When we talk about an inclusive economy, we are talking about economic development from the ground up – focusing on communities that have been left out of the conversation when it comes to what our economy should look like," Melendez says. "IEGO brings together a diverse set of groups to learn and act together on the issues we see now and the ones we see coming."



Among the challenges in growing and attracting higher-quality, higher-paying jobs is the region's baccalaureate deficit. "We have been viewed as a region with a low-skill workforce," Melendez says. "We have to reverse that by partnering with our universities and community college districts. Community organizations need to be at the table to inform policy and programs, and to help implement them."

IEGO is targeting the industrial sectors of sustainable logistics, green technology, cybersecurity, and advanced manufacturing.

In 2021, IEGO identified several efforts aimed at building sustainable logistics and green technology: a California Sustainable Logistics Center of Excellence; the proposed Opportunity to Advance Sustainability, Innovation, and Social Inclusion (OASIS) clean technology park at the University of California, Riverside; a Next-Gen Inclusive Workforce project; the Black and Brown Collective (now Multicultural Collective) to bring equity and inclusion in jobs and business opportunities; and the Micro Enterprise Collaborative of Inland Southern California for small-business development.



"We have a lot to build on if we work together. California State University, San Bernardino has an amazing, nationally recognized cybersecurity program," Melendez says. "But, for our IE students, we need to develop more local jobs in that sector. You can only do that if you coordinate a lot of activities across the region."

In June 2021, IEGO's co-chairs authored a letter to the Inland Empire Legislative Caucus in support of the Community Economic Resilience Fund (CERF), stating in part: "IEGO has an aggressive agenda for inclusive, sustainable growth through public/private/civic



partnerships, striving to do economic development differently by developing asset-based, participatory strategies for generating quality jobs ... IEGO views the Inland Empire's racial and immigrant diversity as one of its greatest strengths and believes that diverse decision-making processes and power sharing are foundational for closing the equity gaps that exist in the region."

Established in September 2021, the \$600 million CERF fund is designed to help nonprofits and tribal governments in the state develop roadmaps for creating high-quality jobs and more inclusive and equitable economies. IEGO's goal is to ensure all innovation and economic growth is sustainable and tied to benefits for workers and residents.

IEGO has built a broad collaborative of 90+ organizations to respond to the CERF Phase I planning grant for \$5 million. The historic effort has the potential to catalyze the region for generations of people and businesses in the Inland Empire.



# Partnering With Donors

Meet a trio of IECF funders who make philanthropy personal.

PHOTOGRAPHY BY ALBERT ANGELO



## RANDALL LEWIS

Randall Lewis wants people to have a sense of belonging beyond the walls of their homes. The Claremont resident, who fulfills a family legacy of creating fair housing in California, feels “strongly connected” to at least 15 cities in which The Lewis Group of Companies has developed real estate.

“I’ve always cared about helping people and inclusivity, but [IECF CEO] Michelle Decker opened my eyes to collective impact – working together to make a real difference,” Randall says.

Randall donated \$80,000 to IECF’s Here for Good Fund, which supports the foundation’s annual operations. “It is a way to say to the board, ‘I support the direction you’re going,’” he explains. He especially appreciates the connections that can be made through “intersections between disciplines” whereby people begin thinking “in new ways and new combinations.”

“In our region of over 4 million people, we’ve got a lot of talent,” Randall says.

“How do we unleash that talent and give people opportunities to think more entrepreneurially?”

Randall raises questions as challenges to be met with inclusivity. He not only wants others in economic positions such as his to say, “This is my community and I want to give back,” but for the greater Inland Empire population to be able to say, “This is my community.”



## THE WEBB FAMILY

Kyle Webb invokes an African proverb: “If you want to go fast, go alone. If you want to go far, go together.” This idea underpins Webb Family Enterprises’ partnership with IECF to create the Webb Family Fund for Parity.

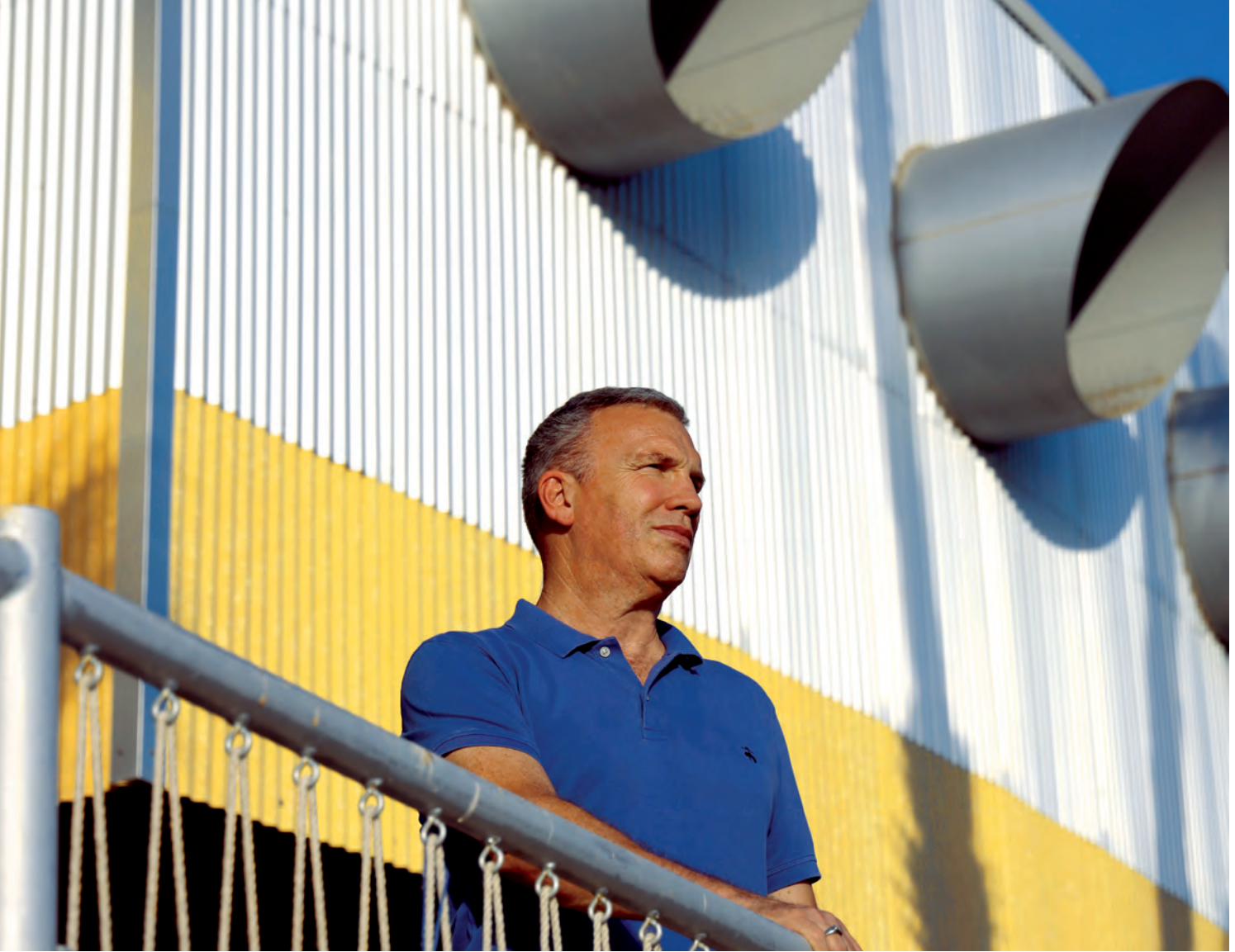
The Webbs – Reggie and René and their children, Karim, Kiana, and Kyle – have been active philanthropically and as community leaders, tracing to Reggie’s chairmanship of the National Black McDonald’s Operators Association, which negotiated a parity agreement to align the percentage of African American-owned franchises with the percentage of African Americans in the U.S. population. The Webbs believe a similar approach can apply to the Inland Empire, where they live and have operated 16 McDonald’s restaurants.

“We felt that we had to organize the leadership of the African American community around unity and parity and drive the community to improve,” Reggie says.

As Kyle puts it, the family is passionate about “transforming quality-of-life outcomes. We want to strengthen our ties in the community in an authentic way by putting our resources to work here.”

René adds, “We have to share our blessings. When you share your wealth, it grows.”





### **JEREMY HOBBS**

As president of Western Wind Foundation, Jeremy Hobbs focuses on “human infrastructure, helping organizations achieve their goals by creating the network of support they need.” He found IECF CEO Michelle Decker to be of like mind and soon joined the foundation’s board.

“There are a lot of organizations doing good work,” he says. “How do we encourage them to work together? Because they’re going to be negotiating with governments and private enterprises and will be heard more strongly if they’re working and speaking together.”

Jeremy, whose background includes law, business, and consulting to California water districts, has seeded an 80th anniversary Signature Fund with \$40,000 to address problems caused by the Salton Sea’s evaporation, and pledged another \$80,000 to be split among IECF’s Here for Good Fund, President’s Innovation Fund, CIELO Fund, Arts for the IE Fund, and marketing to promote giving to the Signature Funds – donations he calls investments.

“I am excited about the Signature Funds,” he says. “The foundation gives people an opportunity to invest in the issues most critical to our region.”



## AN ADVISOR'S WORDS OF WISDOM

When estate planning attorney Teresa Rhyne talks to clients about charitable giving, their concerns sometimes turn to how they can trust a nonprofit to remain focused on its mission over time.

"I tell them, 'You can't know that after you're gone, but there is an organization that can,'" Rhyne says, referring to IECF. "If a client is interested in a cause, rather than picking one nonprofit that may not be the same organization 20 years from now, they can set up a fund through the foundation," Rhyne says. "The foundation can manage the fund and work with the donor and family members."



Rhyne, a Professional Advisors Champion, recalls a client who created a trust for a donor-advised fund. Every year, his five children decide where funds will go. "They get together and remember what was important to him," she says. "His memory gets honored, and the community gets support."

Learn how you can become a Professional Advisors Champion by visiting [iegives.org/advisors](https://iegives.org/advisors)

## OUR TOP SUPPORTERS

Each has donated more than \$1 million to date. Asterisk (\*) denotes program funder.

*Estate of Molly Adams*

*Estate of Agatha J. Baxter*

*California Community Foundation\**

*The California Endowment\**

*City of Lake Elsinore*

*College Futures Foundation\**

*County of Riverside\**

*County of San Bernardino\**

*Estate of Marcia Ann Ellison*

*Mary C. Herdina Estate Trust*

*The James Irvine Foundation\**

*Mr. and Mrs. James B. Jacqua*

*Mrs. Dody Jernsted  
and Mr. Dick Becher*

*Estate of Edith Johnson*

*The Johnson Foundation*

*S.L. Gimbel Foundation*

*Shield Realty of California, Inc.*

*Fred Stebler & Eva V. Stebler  
Foundation Trust*

*Winifred L. Stevens Foundation*

*Mr. Kyle Webb*

*Weingart Foundation\**

*WildSpaces, LLC*

*Willmas Trust*

*Anonymous Donor*

**Visit [iegives.org](https://iegives.org) to learn more about opening or donating to a fund.**

# 2021 Financials

**\$130 million**

**total in assets**

posted investment returns of  
14.5% (10-year average)  
for endowed assets.

## Grants by Program Area

IECF provides grant support to a range of nonprofit organizations doing significant work in the region and beyond.

**HEALTH AND  
HUMAN SERVICES  
\$9,841,387**

**EDUCATIONAL  
SCHOLARSHIPS  
\$3,268,632**

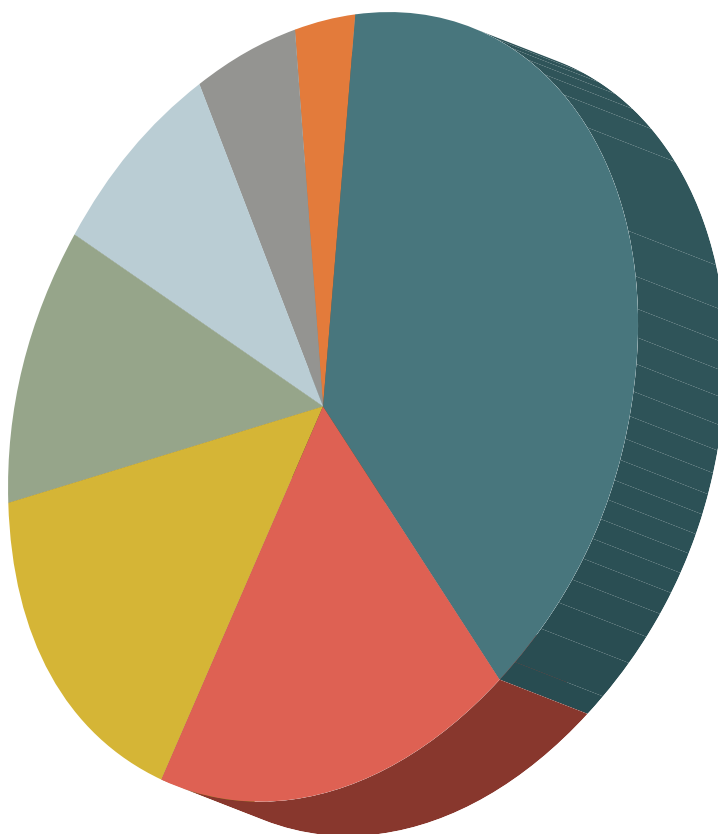
**CIVIC AND  
ENVIRONMENTAL  
BENEFIT  
\$3,220,132**

**CHILDREN AND  
FAMILIES  
\$1,229,483**

**ADVOCACY  
\$1,010,133**

**OTHER  
\$663,706**

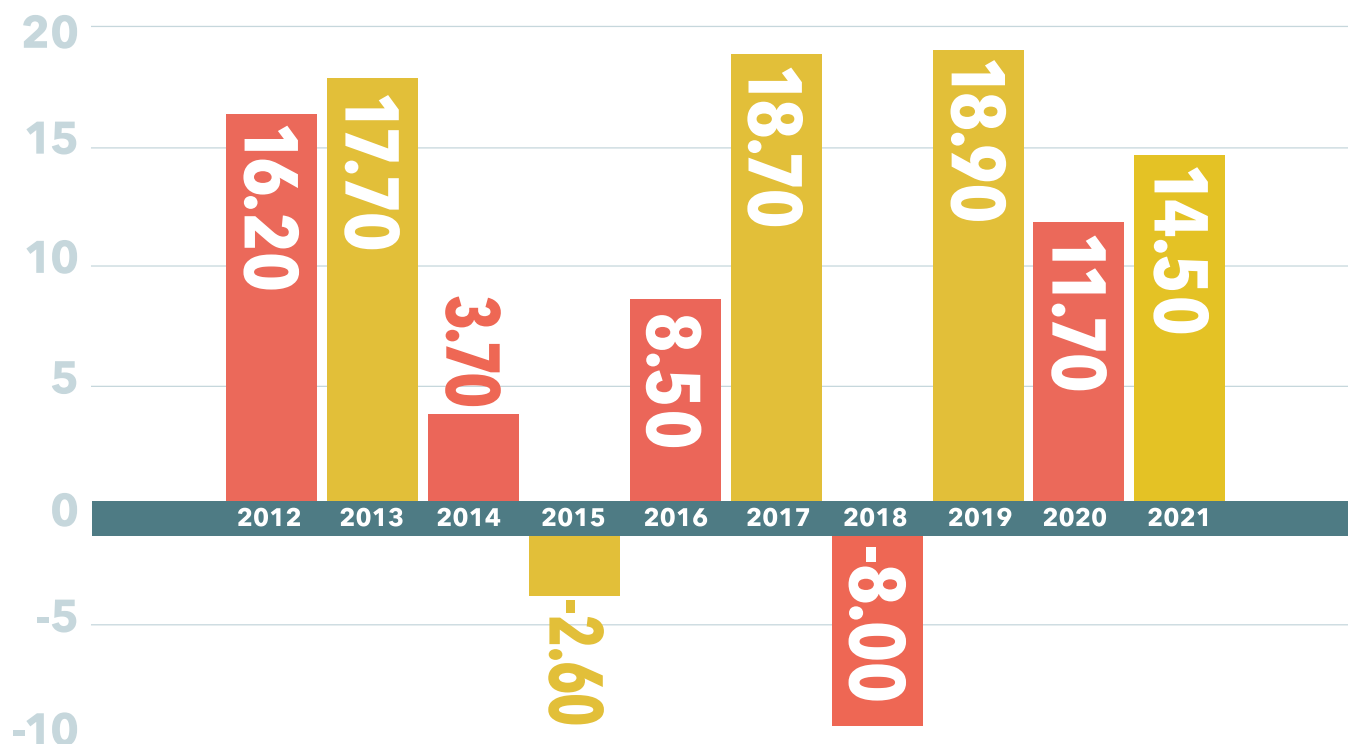
**ARTS AND CULTURE  
\$275,099**





## 10-Year Average 9.4% (Net of Fees)

Recognizing that in the short term, investment markets play out randomly and unpredictably, the IECF Investment Committee and Verus Advisory have structured the foundation's endowed portfolio with a long-term focus to achieve a reasonable degree of certainty. They continue to rely on sound investment policy for the benefit of donors and employ best practices as they oversee the foundation's investments.



## Total in Gifts, Grants, and Scholarships

In 2021, donors gave more than \$22 million in gifts to IECF. Through the generosity of our donors, IECF has distributed more than \$19 million in grants and scholarships locally, nationally, and around the globe.

**\$22mil**



# INVESTMENT COMMITTEE 2021

## IECF BOARD MEMBERS



**SERGIO BOHON**

Committee Chair,  
Senior Financial  
Advisor, SVP,  
Wells Fargo Advisors



**ROBERT FIELD**

City Manager,  
City of San Bernardino



**JEREMY HOBBS**

President, Western  
Wind Foundation



**KATHY JOHNSON**

Vice President, JS Held



**ANN SHEFFER**

Philanthropist

## COMMUNITY MEMBERS



**ROBERT FEY**

Chairman,  
Fey's Canyon Realtors



**J. KIRK HARNs**

President,  
Pacific Hydrotech  
Corporation



**GARY ROTH**

First Vice President,  
UBS Financial Wealth  
Management



**DWIGHT TATE**

Retired  
Financial Advisor



**NEAL WANER**

Partner,  
Stout Payne Waner  
Wealth Management

19  
ion

20

New funds  
created in 2021

397

Total number  
of charitable funds



# Board of Directors



**DR. PAULETTE BROWN-HINDS**  
CHAIR  
President and Publisher,  
Voice Media Ventures



**NEFERTITI LONG**  
VICE CHAIR  
Chief Operating Officer,  
Alta Loma Enterprises



**KATHY JOHNSON**  
CFO  
Vice President,  
J.S. Held



**JEREMY HOBBS**  
SECRETARY  
President,  
Western Wind Foundation



**SERGIO BOHON**  
CFP, IMMEDIATE  
PAST CHAIR  
Senior Vice President,  
Wells Fargo Advisors



**DR. DORA BARILLA**  
President,  
HC2 Strategies



**DAVID BRISTOW**  
General Counsel and  
Executive Vice President,  
Entrepreneurial  
Corporate Group



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