

# THE SAN DIEGO FOUNDATION CHARITABLE GIVING

Quarterly

AUGUST 2004

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## THE SAN DIEGO FOUNDATION INTRODUCES “UNDERSTANDING SAN DIEGO”

### *An Initiative Seeking Knowledge, Consensus and Action*

Reflecting on the past year, Colette Carson Royston, chair of The San Diego Foundation's Board of Governors said, "Last year was an extraordinary time for San Diego and The San Diego Foundation. Our community rallied in the face of the October wildfires, generously helping our fire-stricken communities. The local economy grew, with gifts to The Foundation rising as well. The Foundation gained over \$45 million in contributions to new and existing funds and 95 new funds were opened. The Foundation's assets now total \$424 million, with more than \$200 million in permanent endowments."

The Foundation gave over \$47 million back into the community in nearly 3,000 separate awards. "Last year we awarded nearly \$1 million per week to nonprofits in San Diego," said Carson Royston. "And this significant achievement was done while The Foundation also worked on its San Diego Regional Disaster Fund and its After-The-Fire Fund, for which The Foundation charged no fee."

"The power of philanthropy to

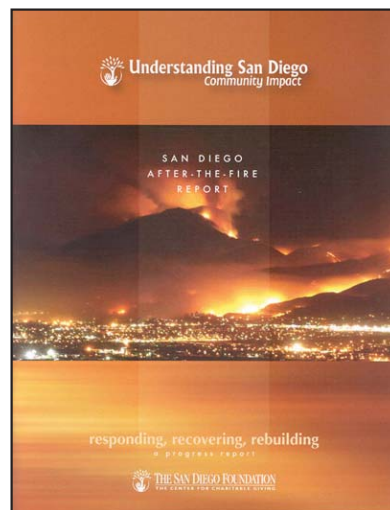
make life better in all our communities has been well demonstrated," said Carson Royston. "Understanding San Diego' is the title of a continuing initiative of The Foundation based on the premise: *We must understand. Then we can act.* The Foundation strives to acquire

and share a clear understanding of the region's largest issues, then engage the community in collaborative planning and execution that produces results."

Understanding, action, and results are the watch words of The Foundation and the key concepts in the "Understanding San Diego" initiative. It encompasses the four quadrants of The Foundation's work:

expertise in charitable giving; donor services; community impact and strengthening the nonprofit sector.

Carson Royston added, "Think how much more effective charitable giving can be if everyone has a clear picture of San Diego issues, is in agreement on the problem and the solution, and takes collective action, via charitable giving, to make life better for everyone in San Diego."



*The After-The-Fire Report is the first publication of The Foundation's "Understanding San Diego" initiative. Please see Page 8 to learn more about this report.*



**THE SAN DIEGO FOUNDATION**  
THE CENTER FOR CHARITABLE GIVING

## MEET OUR NEW MEMBERS OF THE BOARD OF GOVERNORS

### JANE TREVOR FETTER



Jane Trevor Fetter is a highly visible and prominent member of the San Diego community. Her volunteerism encompasses service with La Patronas, Junior League of San Diego, Gifted Association of the Board of Education, Bishops School Alumni Association, and the Governor's Commission on Aging as well as chairing events for the San Diego Zoological Society, America's Cup, Reuben H. Fleet Space Theatre, Birch Aquarium and Children's Hospital Foundation.

No stranger to accolades, she was selected as "Mother of the Year" by the March of Dimes, and honored as a "Woman of Dedication" by the Salvation Army. For the past two year, Mrs. Fetter has been very active in The San Diego Foundation's Scholarships Selection Committee and we are very pleased to welcome her as a member of our Board of Governors.

### DANIEL SULLIVAN, PH.D.



Dr. Sullivan holds a Ph.D. in organization communication from the University of Nebraska. He is very active in the community, currently serving as a member of the Board of Directors for the San Diego State University Foundation, UC San Diego's School of Engineering Corporate Affiliate Board, and San Diego State University's, Center for Entrepreneurial Studies. Leadership, expertise and service are hallmarks of this individual's accomplishment. We are very pleased to welcome Dr. Sullivan to our Board of Governors.

## DEPARTING BOARD MEMBERS

### H. WILLIAM KUNI



Bill has served on the Board of Governors since 2001. He is the Founding Chair of The San Diego Foundation's Environment Program Working Group and has served on the Strategic Planning, Marketing, and Distribution Committees. We thank Bill for his many contributions to The Foundation over his years of service. Mr. Kuni is actively involved in the community. His recent Civic Board of Directors memberships include the San Diego Natural History Museum, the AVID Center for Education, and the San Diego Ecology Center. Bill will continue his service as a member of the Environment Working Group.

### R. MICHAEL McCRAW



Mr. McCraw has been a dedicated member of the Board of Governors for seven years. He is president & CEO for the California Southern Small Business Development Corporation. He is a former host of the television show Business to Business; former Director of Client Services for the Fresno County Economic Development Corporation; former Executive Director of the Michigan Minority Technology Council in Ann Arbor, Michigan; and member of the Board of Directors for the San Diego Neighborhood Funders. We thank Mike for his many contributions.

## COMMUNITY PARTNERSHIPS SPRING 2004 GRANT AWARDS

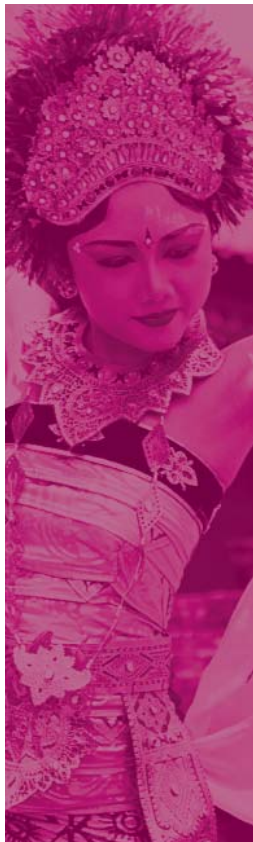
Discretionary grant funds, known as Community Funds, enable The Foundation to respond to emerging community needs as they change over time. We deeply appreciate the donors who contribute to these funds, making an investment in our community knowledge to support the greatest needs facing San Diego County. The flexibility and broad purposes of community funds assure that our donors accomplish the greatest good with the most impact.

A critical component of "Understanding San Diego" is the community impact made possible by the discretionary grantmaking of our Community Partnerships team. Each year, guided by the Community Partnerships Committee, six Working Groups study the critical needs in our community; set priorities for funding and result expectations; diligently review grant applications and award the discretionary grantmaking dollars to nonprofit organizations serving the San Diego region. When community funds are established, the donor entrusts The Foundation



to carry out their vision for San Diego. They do this because The San Diego Foundation works very hard to understand the needs of our community.

Through research, convenings, site visits and our relationships with people throughout San Diego, The Foundation learns about the critical needs of the county and creates strategies to meet these needs. This year The Foundation's two-year-old Community Partnerships program granted out nearly \$1.8 million to nonprofit groups in the following six specific areas of concern to the community: Arts & Culture, Civil Society, Environment, Health & Human Services, Science & Technology, and Organizational Success.



## ARTS & CULTURE

### Spring 2004 Grant Awards

This year the Arts & Culture Working Group distributed funds as part of a county-wide effort to increase public participation in art and culture through partnerships.

**Balboa Park Cultural Partnership** \$22,500

To support a collaborative marketing and branding project amongst 21 cultural institutions in Balboa Park to increase attendance.

**Coronado School of the Arts Foundation** \$22,840

In partnership with Eveoke Dance Theatre and the Fleet and Family Support Center North Island, to develop an integrated arts project and outreach program focused on the stresses on military children in today's War on Terrorism.

**Jean Isaacs' San Diego Dance Theater** \$25,000

To support a series of site-specific dances along a selected segment of the San Diego Trolley Line partnership with the San Diego Metropolitan Transit Development Board.

**Mainly Mozart** \$25,000

To support an intensive audience development partnership with Southeast San Diego's Jackie Robinson YMCA intended to increase public participation in the arts.

**Museum of Contemporary Art, San Diego** \$24,700

To launch an arts education partnership linking MCASD Downtown with the nearby Monarch and Harborside schools.

**Old Globe Theatre** \$20,000

To partner with Teatro Mascara Magica to produce and present La Pastorela for a diverse San Diego audience.

**Onstage Playhouse** \$9,383

To support a partnership between OnStage Playhouse, Chula Vista Friends of the Arts, and the Alliance of Visual Artists to create a multi-cultural Theatre & Arts Center.

**Ramona Council of Arts** \$3,500

To continue to improve the quality and production values of Summer Dancin', a 16-year-old partnership with Jean Isaacs San Diego Dance Theatre and Palomar College.

**San Diego Book Arts** \$5,970

To support a traveling book arts exhibition at branch libraries in collaboration with San Diego Public Library.

**San Diego Opera** \$25,000

To support the new Opera Talk for Schools television/video program in collaboration with UCSD-TV.

**San Diego Repertory Theatre** \$25,608

To support a community-based research and development project in partnership with key individuals and organizations in the region, leading to the creation of a new work of binational regionally-voiced theatre.

**Young Audiences of San Diego** \$25,000

To provide and promote both arts performances and hands-on arts activities as enriching and inspiring experiences, especially for underserved families, in partnership with the San Diego Ballet and the Salvation Army Ray and Joan Kroc Corps Community Center.



# CIVIL SOCIETY

Spring 2004 Grant Awards

This spring, the Civil Society Working Group distributed grants to projects and programs that support the development of affordable housing or foster youth projects in community problem solving.

**Art Now!** \$20,000

The Voices Project  
To support Voices Project teen workshops in using video and photography to highlight community efforts.

**Casa Familiar, Inc.** \$20,000

Youth Leadership & Community Involvement Institute  
To identify, train and develop youth for civic leadership and responsibility in San Ysidro.

**National Conference for Community and Justice** \$20,000

Youth Civic Issues and Advocacy  
To provide opportunities for direct advocacy work, from conception to implementation, by expanding the involvement of existing youth created policies.

**North San Diego County Sponsoring Committee** \$20,000

Housing for All  
To engage North County citizens and immigrants in community organization that leads to changes in public policy and programs related to affordable housing.

**Oaks and Acorns, Inc.** \$8,000

Great Oak Dialogues  
To engage youth and seniors through intergenerational dialogue to share stories and perspectives on issues that are of concern to both generations.

**San Diego ACORN** \$20,000

Renters Rights/Affordable Housing Campaign  
To build an organized voice for renters, win greater renter protections and champion affordable housing through city and state policies.

**San Diego Housing Federation** \$20,000

Measuring and Assessing the Status of San Diego  
To establish a baseline analysis of the capacity of San Diego's nonprofit affordable housing developers to meet the region's need for affordable housing.

**San Diego Organizing Project** \$15,000

Time for Action: Housing for All  
To further San Diego Organizing Projects community-driven housing campaign that will result in a comprehensive housing strategy created by bringing together city officials and housing stakeholders.

**Sweetwater Union High School District** \$20,000

Blurb Magazine  
To train high school writers to research and report the cause of issues in their community such as drugs, date rape, violence, street racing, drunk driving, and truancy, and provide resources for students to solve these issues.

**Neighborhood Civic Fund Grant Awards**

**Azalea Park Neighborhood Association** \$2,700

**Friends of Hellhole Canyon Open Space Preserve** \$3,000

**Ridgeview Neighborhood Association** \$2,000

**Rolando Community Council** \$3,000

**Spring Valley Citizens Association** \$3,000

**Torrey Hills Community Awareness** \$3,000

# ENVIRONMENT

Spring 2004 Grant Awards

This year's environment grants were awarded to projects that help advance critical efforts to protect our region's open space and nature preserves, as well as help to eliminate toxic pollutants in our region's air, land and water.

**32nd Street Canyon Task Force** \$25,000

32nd Street Canyon Restoration  
To mobilize community volunteers to eradicate invasive plants and restore native habitat in the 32nd Street Canyon.

**Agua Hedionda Lagoon Foundation** \$25,000

Project Interact (PI)/Watershed Stewards Training (WST)  
To involve community residents in water quality monitoring of local creeks and streams in the Carlsbad watershed.

**Back Country Land Trust of San Diego County** \$5,000

Back Country Feasibility Study  
To advance land and watershed conservation in Southeast San Diego County. An additional \$5,000 awarded to provide interpretive signage for the newly protected Wright's Field in Alpine.

**Carlsbad Educational Foundation** \$22,890

Communities Alive in Nature  
To involve students in watershed restoration projects as a means to teach science curriculum correlated with California Standards.

**The San Diego River Park Foundation** \$15,000

To develop a mitigation strategy for the San Diego River Watershed to increase natural resource protection for the area.

**San Diego River Park Lakeside Conservancy** \$24,200

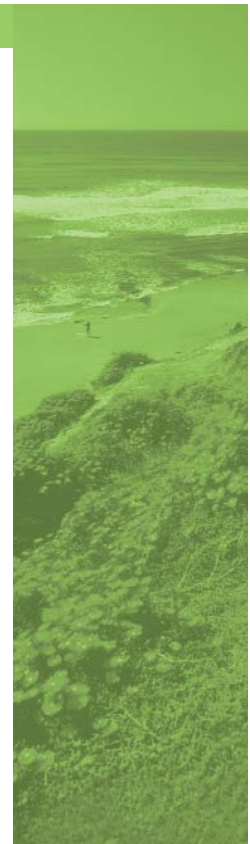
Lakesides River Park Reach Out Project  
To educate the public about the Conservancy's recently funded restoration and water quality projects.

**Urban Corps of San Diego** \$25,000

Crestridge Ecological Reserve  
To employ at-risk young adults to establish the final appropriate trail system at the Crestridge Ecological Reserve.

**Walking Shield American Indian Society** \$25,000

Operation Walking Shield  
To work with local residents to reduce exposure to toxic pollutants on the Santa Ysabel Reservation, through the elimination of a local landfill.



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## HEALTH & HUMAN SERVICES

### Spring 2004 Grant Awards

This year, the Health & Human Services Working Group distributed funds to prevent family homelessness using by strategies that enhance financial literacy and increase enrollment in education and job training programs.

**Bronze Triangle Community Development Corporation** \$30,023

To deliver financial literacy workshops and savings clubs to low/very-low income residents in the communities of Grant Hill, Logan Heights and Stockton.

**Comprehensive Training Systems** \$34,800

Family Support Programs to provide interventions that decrease vulnerability to homelessness while increasing stability of the home environment.

**Home Start, Inc.** \$34,800

To support Reach for the Heights, a financial literacy program for low-income households in Central and East San Diego County.

**Horn of Africa Community in N. America** \$33,500

To implement the Somali Financial Literacy Program for Somali families to increase their understanding of the financial system in the United States.

**San Diego Home Loan**

**Counseling Service, Inc.** \$34,800  
Financial Keys to Preventing Homelessness for At-Risk Families  
To expand current services to include after hours and weekend budget, credit, and financial counseling to 125 working-poor families vulnerable to homelessness.

**South Bay Community Services** \$35,000

To provide at-risk low-income families living in 7 affordable or transitional housing sites in the South Bay with a range of on-site, individualized financial literacy services.

## SCIENCE & TECHNOLOGY Spring 2004 Grant Awards

This year's Science & Technology grants were distributed to organizations that help improve math and science education in local schools and prepare youth for future employment in San Diego County.

**Barrio Logan College Institute** \$23,109

Operation Math Skills  
To support BLCI's Middle School College Preparation Program.

**Interfaith Community Services** \$26,757

Grant Middle School/Interfaith Community Orchard of Learning  
To provide an after-school program that aims to improve middle school students math and science skills.

**MAAC Project** \$32,260

Science & Math Institute (SAMI)  
To increase student testing performance on the standardized tests at the same time igniting a level of student curiosity and interest in exploring the realms of science and math as fields of higher learning dimensions, the three spatial dimensions plus time, using state-of-the-art techniques of light and electron microscopy.



**BLASKER GRANT AWARDS:**

Samuel M. Blasker believed in encouraging innovative approaches to solve critical environmental problems. Through the Blasker Grants Program, The Foundation carries out Blasker's wishes to develop innovative discoveries and experiences that can benefit mankind; and to support individuals with high potential in the scientific, engineering and medical fields to reach their full potential in their chosen areas of study and work.

**BLASKER ENVIRONMENT GRANT AWARDS:**

**The Land Conversation** \$40,700

To support the research of an emerging scientist, working in conjunction with Native American students, tribal elders, State Parks, and UCSD students, to test the application of indigenous land management techniques to conservation areas of San Diego County.

**San Diego Baykeeper** \$30,000

To partner with faculty and graduate students with the UCSD San Diego Regional Workbench Consortium and the SDSU Geography Department in the creation of an online, regional GIS database of comprehensive and standardized water quality information.

**San Diego State University Foundation** \$30,000

To support the research of an Assistant Professor and two graduate students in Environmental Engineering, testing a new method for low-cost removal of heavy metals from automobile dismantler lots.

**San Diego State University Foundation** \$10,000

To support the research of a Master's Student in Public Health, identifying key sources of hazardous pollutants to the environment and communities of the San Luis Rey Watershed.

**San Diego Tracking Team** \$18,100

To analyze and enhance wildlife survey data collection in partnership with USD and SDSU faculty and students, to create a model for county management of land use for wildlife corridors.

**Scripps Institution of Oceanography** \$10,000

To investigate the effects of two types of disturbance on communities of algae and invertebrates in rocky intertidal areas of San Diego County, to enhance management of coastal protected areas.

**BLASKER SCIENCE & TECHNOLOGY GRANT AWARDS:**

**Human BioMolecular Research Institute** \$71,030

To provide local students an opportunity to work with an investigator doing state-of-the-art human pharmacogenetics and modern bioanalytical chemistry by utilizing modern technology.

**Salk Institute for Biological Studies** \$50,000

To define the roles of genes that regulate the development of the functional organization of the visual system and that establish visual acuity and binocular vision.

**San Diego State University Foundation** \$73,690

To provide information on lateral carbon flux at the watershed scale that will be useful in estimating global carbon budget.

**San Diego State University Foundation** \$25,000

To provide an efficient and selective route to the drug targets azaspiroline and spatol.

**San Diego State University Foundation** \$25,000

To analyze the critical role of mitochondria in the progression of apoptosis in four dimensions, the three spatial dimensions plus time, using state-of-the-art techniques of light and electron microscopy.

**University of San Diego** \$39,310

To study nucleic acid structure, engage a diverse group of young emerging scientists, and inform local high school teachers and the broader scientific community of the research results.



# ORGANIZATIONAL SUCCESS

## Spring 2004 Grant Awards

This year's grantees are working to strengthen their ability to deliver effective services to the San Diego community. Each organization created a work plan with an appropriate consultant to strengthen key areas, build on best practices and implement a plan for long term success.

### **Boys & Girls Clubs of Inland North County** \$20,000

Technical Assistance  
To provide technical assistance, hardware and software to the implement Visions computerized membership tracking system at all 11 of the agency's club sites.

### **Center on Policy Initiatives** \$23,000

Constituency Development  
To make Center on Policy Initiatives research available electronically to grassroots groups who benefit from their work.

### **Community HousingWorks** \$10,000

Public Relations  
To reposition Community HousingWorks' public relations materials.

### **El Cajon Community Development Corporation** \$16,650

Board and Staff Development  
To build consensus among Board and staff members regarding committee responsibilities, create action steps for committee Work Plans and develop the Sponsorship Program.

### **Harmonium, Inc.** \$25,000

Organizational Success  
To support the final phase of strategic planning to develop operational plans and assist in plan implementation.

## FACES OF THE FOUNDATION

### *Inside The Foundation's 29th Annual Meeting and Grant Awards*

The Museum of Contemporary Art San Diego, La Jolla hosted The San Diego Foundation's 29th Annual Meeting. The Foundation celebrated the year's many achievements, introduced the initiative "Understanding San Diego," and awarded the 2004 Community Partnerships Grant Awards.



Jim & Peggy Polak



Eileen Haag & Colette Carson Royston



Linda Katz & Nancy Spector



David Flores & Andrea Skorepa  
Casa Familiar Grantees



Ned Smith & Jane Trevor Fetter



Alan & Louarn Sorkin



Martha Dennis & Bob Kelly



Ruth Patterson, Denise Lew,  
Elizabeth Yamada



Jack Ward & Jared Aldern



A  
*will to do good*  
and the ability to bring  
it to pass  
come together in

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Foundation.*

Be part of  
the answer to  
"What's Right with San  
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## PROFESSIONAL ADVISOR HIGHLIGHT

*Bill Beamer of Beamer, Lauth, Steinley & Bond, LLP*



Bill Beamer specializes exclusively in estate planning; trust and probate estate matters, as well as legally representing foundations and nonprofit organizations. A California native, Beamer received his A.B. degree from Stanford and his J.D. from the University of California, Berkeley, Boalt Hall School of Law. He spent the first 27 years of his career practicing in the San Diego and La Jolla offices of Gray, Cary, Ware and Freidenrich as a member of the Trusts and Estates Practice Group. In January of 1997, Beamer opened his own firm, Beamer, Lauth, Steinley & Bond, LLP, in downtown San Diego.

Bill's practice involves estate planning for individuals and families. His special skill is helping his clients build meaningful, thoughtful legacies for their families, friends and communities while achieving substantial tax savings. He works to create

*"The San Diego Foundation has information that can help you and your clients."*

a comprehensive, strategic plan for his clients and their estates to accomplish a wide variety of objectives.

Beamer first became acquainted with The San Diego Foundation through his volunteer work with The Parker Foundation. In the 1970's, the Parker Foundation awarded grants to The San Diego

Foundation to support the philanthropic goals of The Foundation. Bill has since recognized The Foundation as a valuable resource for both attorneys and their clients. Charitable giving can be a complex process, with vast amounts of information required to make correct decisions. Beamer believes the Foundation offers his clients broad charitable giving opportunities and he is "very impressed by the The Foundation's effective fund management."

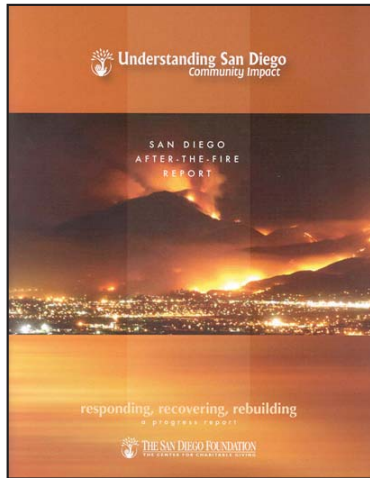
The Foundation offers Beamer's clients the opportunity to provide for a variety of causes. For example, in 1990, Beamer helped establish an endowment fund for an estate planning client who cared deeply about providing for assorted commu-

nity programs, including the San Diego Historical Society, Old Globe Theatre, San Diego Zoological Society, San Diego Symphony Orchestra and Goodwill. To this day, the San Diego community continues to benefit from the grants this fund awards. The Foundation carries out the charitable interests of the client in perpetuity, acting as steward for the funds and ensuring that all recipients continue to be viable charities. Beamer says, "I've found The Foundation to be very responsive to our clients' needs, whether as a resource for charitable giving or as a recipient of philanthropic gifts, either outright or in trust." Beamer relies on the resources available to him at The Foundation and respects The Foundation's support of philanthropy in the community. Beamer would like other professional advisors to be aware of the services The Foundation offers and says, "The San Diego Foundation has information that can help you and your clients."

A believer in philanthropy and an active leader in the community, Bill's volunteer commitments are many. He has been involved with the Parker Foundation since 1972, in which he currently sits on the Board and serves as President. He is a member of the San Diego Zoological Society Education Committee, has served on the Board of Trustees of UC San Diego Foundation, as a member of the Chancellor's Associates at UCSD and on the Board of Mercy Hospital. Bill is a member of the Rotary Club of San Diego and is a past President of both the San Diego and La Jolla clubs.

In addition to his professional and volunteer work, Beamer is dedicated to his family. He and his wife Sharon have been residents of Mission Hills for over 34 years. They have three sons and four grandchildren.

*To learn more about our resources for professional advisors, please call Jill Metcalf at 619-235-2300 or visit [www.sdfoundation.org/resources](http://www.sdfoundation.org/resources).*



## AFTER-THE-FIRE REPORT: NOW AVAILABLE ONLINE

In the wake of the 2003 October wildfires, the San Diego community responded generously with the outpouring of donations of time, ideas, energy and resources to offer aid to the fire-stricken areas. The San Diego Foundation recently published the **After-The-Fire Report**, a 32-page summary of the “responding, recovering, and rebuilding” process. The report details where The Foundation provided grants and offers an overview of the ongoing needs of the fire affected regions in San Diego.

The After-The-Fire Report is available online at [www.sdfoundation.org](http://www.sdfoundation.org).

## OUR BOARD OF GOVERNORS

Colette Carson Royston, RN, MN, *Chair* 🐾 Bruce Blakley, *Vice Chair* 🐾 Sandra Daley, M.D., *Secretary* 🐾 Raymond V. Thomas, *Treasurer* 🐾 Mary L. Walshok, Ph.D., *Immediate Past Chair* 🐾 Dennis Arriola 🐾 Fred Applegate 🐾 Hon. Rafael Arreola 🐾 Darcy C. Bingham ; Robert B. Clelland 🐾 James M. Cowley 🐾 Martha Dennis, Ph.D. 🐾 Nora Faine, M.D. 🐾 Thomas N. Fat 🐾 Jane Trevor Fetter 🐾 Jerry Hoffmeister 🐾 Murray H. Hutchison 🐾 Conny Jamison 🐾 Jerome Katzin 🐾 Denise Lew, Ph.D. 🐾 Paul Meyer ; Barry I. Newman 🐾 John C. Raymond 🐾 Eugene L. Step 🐾 Daniel Sullivan, Ph.D. 🐾 Stephen L. Weber, Ph.D. 🐾 Carisa M. Wisniewski 🐾 John D. Wylie 🐾 Elizabeth Y. Yamada 🐾 James Ziegler

### Who We Are

The San Diego Foundation's purpose is to improve the quality of life in all of our communities by promoting and increasing responsible and effective philanthropy.

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