



February 2004

Endowment Fund Provides Long-Term Savings Plan for National City Boys & Girls Clubs

Agency Endowment Fund at The San Diego Foundation with the Highest Contributions Received this Year

The Boys & Girls Clubs of National City has been serving National City children and teens for the last 55 years, but has been operating on a shoe-string budget. Several years ago, the organization decided they needed to ensure their long-term financial well-being by actively setting aside funding for their future. They hired a development director and began recruiting financial support from former club members and the local business community. They leveraged relationships with NFL stars, hosted a golf tournament in conjunction with the recent Super Bowl, received a matching grant from a former member-turned-real-estate-developer, and in 24 months, raised almost \$200,000 for their endowment fund. In 2000 they established The Boys & Girls Clubs of National City Endowment Fund at The San Diego Foundation, and this year their fund has received more contributions than any other agency endowment fund at The San Diego Foundation.

The Boys & Girls Clubs of National City has almost 2,000 members, and provides quality programs that enhance self-esteem, lead to



Donnie Edwards, Club alumnus & SD Charger, reads to kids and signs photos

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The “San Diego Way”

From article featured in the “Insight” Section, The San Diego Union-Tribune, Sunday, January 4, 2004

The October wildfires revealed a fundamental aspect of San Diego that makes it such a desirable place to live, beyond its climate, natural beauty, and distinctive blend of cultures. This defining element is philanthropy – San Diego’s tradition of using charitable giving to improve the quality of life for all its residents. Charitable giving is a powerful driving force here – it’s what we call the “San Diego Way” – for everyday citizens to invest personally and liberally in their own communities. Indeed, charitable giving is on the rise in San Diego County. Thousands of people of different means work quietly, often anonymously, to improve the quality of life for everyone in San Diego, even for people and generations they will never meet.

To read the entire article, please visit www.sdffoundation.org. Illustration at right courtesy of Jennifer Hewitson, illustrator.



Environment Grants Top \$6.7M

The Environment Working Group’s Results and Successes

The San Diego Foundation is pleased to announce that our grantmaking to environmental organizations and programs has surpassed \$6.7 million since the inception of the Environment Working Group in 2000. Our annual competitive grants to the environment have increased over tenfold. Likewise, we have seen a 25% average annual increase in donor-advised environment grants from 2001-2003, and we currently have over \$4 million reserved in endowment funds earmarked for environmental concerns. Here is a brief update on a few of the Environment program’s successes (call **Emily Young, Ph.D.** for a more comprehensive report):

- The creation of two initiatives for focused grantmaking in the environment: Environmental Health and Justice and Land and Watershed Conservation
- \$4.8 million in funding from donor-advised funds to support the acquisition and restoration of land and watersheds, the rehabilitation of open space for parks in low-income neighborhoods, the reduction and prevention of air, water, and soil pollution, and environmental education and outreach
- \$765,000 in partnerships with other foundations and government agencies

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Results through Charitable Leadership

The October 2003 wildfires in San Diego County caused numerous fatalities, consumed more than 390,000 acres, and destroyed more than 2,500 homes. While the fires were still burning, The San Diego Foundation developed a plan to:

- suspend all normal Foundation activities for two to four weeks,
- obtain additional help (i.e., from community consultants)
- get into the field to observe and understand the conditions first-hand.

We embarked upon a major effort to produce an After-the-Fire Community Needs Assessment, which serves as our guiding principles in grantmaking related to response, recovery, and rebuilding after the October fires.

SMALL GRANTS TO GRASSROOTS CIVIC VOLUNTEER GROUPS

Of the grants made in response to the wildfires, we are particularly proud of a series of small grants made to grassroots civic volunteer groups that stepped into leadership roles in their communities in response to the fires. These heroic citizens chose to pause their lives and normal activities and devoted themselves to providing food, clothing, and shelter during the emergency response phase. They are now transitioning to address their communities' long-term needs

PROVIDING EMOTIONAL AND OPERATING SUPPORT

Just weeks after the fires were contained, the After-the-Fire Fund provided nine civic groups with operational support, including such basic necessities as office supplies, phones, and heaters (for the

Small Grants to Neighborhood Groups

Alpine Community Center - \$1,500

To fund the purchase of items damaged when the community center served as a temporary emergency relief center.

Crest Coordinating Committee for Fire Relief - Friends of Crest - \$1,500

To continue to connect resources and residents in need of assistance.

East County Fire Relief - East County Property Owners Association (fiscal sponsor) - \$2,000
To support ongoing recovery and rebuilding efforts in East County.

Harbison Canyon Management Team - College Avenue Baptist Church - \$3,000

To sustain the recovery and rebuilding efforts of Harbison Canyon Management Team.

Julian Community Resource Center - \$3,000

To address the immediate need and provide advocacy, housing, and financial resources to fire victims in Julian.

Ramona Fire Disaster Relief Fund - St. Mary's in the Valley Episcopal Church - \$1,500

To secure funding for a modular unit to provide a central, ongoing support office space for the urgent needs of fire victims and to purchase items needed for debris removal and cleanup for victims of the Cedar Fire.

Safe Harbor International Relief Action Crisis Teams - Calvary Chapel Church - \$2,000

To provide general operating support to continue to support fire victims in East County San Diego.

Valley Center Fire Relief Fund - \$1,500

To provide financial assistance and support to community members who lost homes in the Paradise Fire.

Valley Center - Pauma Unified School District - \$2,000

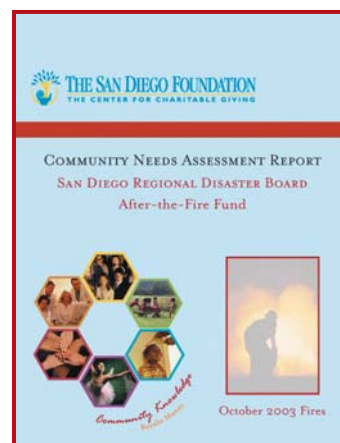
To provide support to the 200 schoolchildren whose families were affected by the Paradise Fire through the Migrant Education Program.

tents in which some groups were meeting). While these grants totaled only \$18,000, spread across nine grassroots civic organizations, this timely funding provided significant emotional and operating support during a critical phase of the disaster. Because of these grants (see box above), the capacity and effectiveness of these civic recovery groups was enhanced and help was extended to hundreds of fire-displaced families. Many of these civic groups were in small, isolated, resource-poor communities that felt overlooked during the emergency phase. Grants

to these civic organizations helped acknowledge their loss and were important morale boosts. These grants demonstrate charitable leadership and the unique opportunity The Foundation had to connect donors and charitable funding with critical community needs.

VIEW THE NEEDS ASSESSMENT ONLINE

You may view the After-the-Fire Community Needs Assessment at www.sdfoundation.org. For information regarding grants made in response to the fires, contact Ruth Patterson, Ph.D. at 619-235-2300.



Boys & Girls Clubs Endowment Fund continued from front page

lifetime relationships and interests, develop interpersonal skills, and complement the family unit in a safe and nurturing environment. Every year the Club receives more than 86,000 visits. The Boys & Girls Clubs of National City is one of the few youth development agencies based in National City, one of the poorest cities in the nation and much in need of positive programs for youth. The Club receives support from local donors and from people who once lived in National City and were served by the club. In their 55 years of operation, the Boys & Girls Clubs of National City has helped many young people go



Club receives national award for its Inclusion program



"Academy of Engineering" program - only one of its kind in the state

on to pursue fulfilling and successful lives, and they have gained many friends and loyal supporters. Their endowment fund helps to ensure that their doors will remain open for many years to come.

If your organization would like to learn more about how it can plan for a secure and prosperous future, please give Jill Metcalf a call at 619-235-2300.

Lemon Grove Education Foundation Creates Scholarship Endowment Fund

In early January, The Lemon Grove Education Foundation established a new community-based scholarship endowment fund at The San Diego Foundation to benefit residents of Lemon Grove.

This scholarship endowment is open to all residents in the Lemon Grove School District and will provide funds in perpetuity for people to improve their lives through educational opportunities.

In order to create this scholarship endowment, The Lemon Grove Education Foundation raised over \$137,300, exceeding its fundraising goal. Included in this total is \$15,000 that the Lemon Grove Foundation has already granted in scholarships to 16 individuals over the past two years. Lemon Grove individuals can now not only apply for this scholarship, but with a single application can reach the many other scholarships housed at The San Diego Foundation.

To learn more about scholarship endowment funds, please call Valerie Attisha at 619-235-2300.

New Grantmakers Help Us Endow San Diego

DAVID SEID - THE JAMES KEE AND PEARL HOM SEID FAMILY FUND

James Seid was born in the Guangzhou countryside of China. He came to Portland, Oregon in 1912 at the age of 2 with his family, who were labor contractors in the fisheries and orchards. James came to San Diego to work as a young adult, and found a job as an aircraft worker during World War II. He was the first naturalized citizen from China in San Diego. Pearl Seid was born 1911 in San Diego, a rare Chinese baby in a bachelor sojourn society. She attended local schools, enjoyed rousing football games at San Diego High, and was the first Chinese-American graduate of San Diego State College. Pearl greeted visitors to the 1935-36 Pan-Pacific Expo in Balboa Park at the House of China cottage. As infants, Christian workers shared Christ's love to James and Pearl and to their respective families. James and Pearl were life-long Christians and active church members. This fund was established through their will by their children for the exclusive benefit of the Chinese Community Church. The Church was begun in 1885 as a Christian outreach to immigrant men. English language instruction, the Gospel, and socialization was and continues to be provided. The Seid family established a fund at The San Diego Foundation to help maximize benefits to the church by relieving management burdens and providing professional investment services. They hope this fund will grow in size and make positive changes in people's lives.

Learn More About Donor Advised Funds

Donor Advised Funds at The San Diego Foundation are a simple, rewarding, and efficient way of making the most of your charitable contributions. A Donor Advised Fund allows you to make a gift, receive an immediate tax deduction, and then enjoy recommending grants to your favorite charities over time. When you work with The San Diego Foundation, you are working with the top professional in the field. We take care of all of the administrative and due diligence concerns so often associated with charitable giving. *To learn more, please contact Jill Houska at 619-814-1342.*

Professional Advisor Highlight

Nancy Henderson, Henderson & Caverly LLP

Nancy Henderson specializes in estate and gift tax planning for the Rancho Santa Fe law firm Henderson & Caverly LLP, which she and Kristen Caverly formed in 2000. Henderson & Caverly has a relatively diverse practice, representing clients in estate planning, probate, litigation, and intellectual property matters, but Nancy's personal practice is limited to estate planning, estate administration, and the creation and administration of charitable trusts and foundations. Her estate planning clients are primarily individuals and families of significant wealth who are trying to create a positive legacy for their families and communities. She helps her clients employ a wide variety of sophisticated estate and charitable planning techniques to accomplish various and often conflicting tax and non-tax estate planning objectives.



Nancy first became acquainted with The San Diego Foundation as a junior associate with San Diego law firm Brobeck, Phleger & Harrison in the early 1990s. Several of the firm's clients had created advised funds at The Foundation, and during her formative years as an attorney, she learned a great deal about charitable giving in the community from her interactions with The San Diego Foundation. As her estate planning practice developed over the years, the breadth of services available to her from The San Diego Foundation became more apparent, and she has frequently utilized The Foundation as a resource for her clients. If a client is interested in a particular charitable cause,

The Foundation can help professional advisors identify which organizations operate most effectively in the client's area of charitable interest. "As attorneys," Nancy says, "part of our job is to assist our clients in identifying resources to help them accomplish their diverse goals. The San Diego Foundation can provide attorneys and their clients a wealth of information about charitable organizations and causes not only here in San Diego but all over the country and even around the world."

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Donor advised funds at The Foundation also provide an excellent alternative for clients who might otherwise create a private charitable foundation, says Nancy. For example, one of her clients is an accomplished artist. She recently received a large monetary grant to create and administer art programs for children in disadvantaged communities. As a condition of the grant, however, the client needed either to form her own private charitable foundation or identify a charitable organization to hold and administer these funds for her. After considering various possible alternatives, the client decided to open an advised fund at The San Diego Foundation. The administrative costs were very reasonable when compared with her other alternatives and the client can now focus on creating the best possible programs rather than the administrative burdens of maintaining and accounting for funds committed to public purposes.

Nancy's own charitable passions have for many years centered around children and animals. Since 1995, she has been deeply involved with Children's Hospital, where she presently sits on the Board of Trustees of their foundation and has served as chair of their Estates and Trusts Committee. She is also very involved with the Helen

Woodward Animal Center in Rancho Santa Fe, where she serves on their Planned Giving Committee and is former chair of that committee.

Nancy received her B.A. from Duke and her law degree from Boalt Hall School of Law at UC Berkeley in 1988, graduating in the top 10% of her class (Order of the Coif). She and her husband Bruce have two daughters, Anna, 14, and Elsa, almost 13. We are very pleased to be able to work with Nancy and greatly appreciate her confidence in our organization. To learn more about our resources for professional advisors, please visit www.sdfoundation.org/resources.

Visit our Professional Advisor Resource Center!

Our Professional Advisor Council helped us develop a website that would assist them when meeting with clients. You can access the many useful documents on this site by visiting www.sdfoundation.org/resources.

Environment Program's Accomplishments, continued from front page

- Nearly \$40 million in leveraged funding from government agencies and private foundations to support local environmental efforts
- Creation of a \$250,000 endowment for one of our key land trusts in north San Diego County, The Escondido Creek Conservancy
- Creation of the county's first state-chartered conservancy along the San Diego River, with \$12 million in initial funding allocated to acquire and protect land along the 52-mile river
- Successful community-based efforts to improve air quality in one of the region's most polluted neighborhoods, Barrio Logan
- Enhanced capacity for conservation planning, land acquisition, and habitat management among land trusts and conservancies dedicated to protecting three major watersheds -Escondido Creek, San Diego River, and San Dieguito River, as well as some of the region's last remaining grasslands in Ramona and coastal sage scrub habitat
- Development of citizen and neighborhood-based water quality monitoring and urban canyon restoration programs across the San Diego region
- Hands-on learning and practical experience for K-12 students, young adults at risk, university students, and young professionals in environmental restoration and management, as well as pollution monitoring and abatement



Recent Grantmaking

Aquatic Adventures Science Education Foundation - \$19,000
For the Students Empowering Students program and for a new specimen collection.

California State Parks Foundation \$1,000
For the "Fire rebuilding matching fund" to qualify for FEMA grant for Cuyamaca Rancho State Park

California Western School of Law \$10,000
For the Practical Law and Activism Now program

City Ballet, Inc. - \$2,500
For the Discover a Dancer program

City Moves! - \$5,000
For the In/formation program

Cystic Fibrosis Foundation - \$5,000
For the Center Court Sponsor

Dress for Success - \$10,000
To support assistance program for women seeking living wage careers

Greater Golden Hill Community Development Corporation - \$3,000
For enhancement and maintenance of public areas in South Park

Humane Society of San Diego - \$2,500
For operations

Junior Achievement of San Diego \$18,200
For general support

National City Nutrition Project - \$2,044
For serving 292 Thanksgiving meals to homebound and isolated seniors

Mainly Mozart Festival - \$5,000
For general support

Palomar Pomerado Health Foundation - \$2,500.00
For general support

Roosevelt Middle School - \$20,000
For student services

San Diego Audubon Society - \$500
To support the renewal of Silverwood

San Diego Civic Youth Ballet - \$5,000
For general support

San Diego Conservation Resources Network - \$25,000
To develop a geographic information system to meet the planning

and resource management needs of upwards of 30 nongovernmental San Diego resource conservancies.

San Diego Food Bank - \$100,000
For capital campaign - renovation to new site

San Diego Food Bank - \$5,000
for Building Against Hunger

San Diego Opera - \$2,800
For general support

San Diego Regional Fire & Emergency Services Foundation - \$50,000
To support housing for the volunteer firefighters who lost their homes.

Senior Community Centers of San Diego - \$80,000
To provide lunches on week-ends to seniors

Tree People - \$1,000
For fire relief - replanting trees in fire areas

UCSD Foundation - \$1,000
For the Preuss School

Vista Community Clinic - \$10,000
To support the Healthy Communities Capital Campaign Fund at the clinic

Become a Friend of The Foundation!

During the October wildfires, The San Diego Foundation was able within hours to respond to the needs of those living in affected areas. Today The Foundation continues to be an integral part of our community's rebuilding efforts. Support from generous Friends like you allows The San Diego Foundation to play this important leadership role. For nearly 30 years, The San Diego Foundation has been the answer to "What's Right with San Diego." As your community foundation we have invested over a quarter of a billion dollars in charitable grants to improve our community by supporting many of the causes important to you, including preparing today's youth for tomorrow's workplace, protecting our environment, enriching our arts and cultural offerings, empowering individuals to engage in community problem solving, and providing health-care for people in need. Because of our important mission, we invite you to become a Friend of The Foundation. As a Friend, you will join other San Diegans who are part of the solution. Please accept our invitation by donating online at www.sdfoundation.org or by simply returning the enclosed envelope with your contribution. *If you have any questions about this program, please call Sara Wilensky at 619-235-2300.*

Now Issuing Charitable Gift Annuities!

The San Diego Foundation is now issuing Charitable Gift Annuities! A Charitable Gift Annuity can provide you with a partially tax-free income and an income tax deduction, can generate immediate or deferred income for the life of one or two designated individuals, and allows the remainder assets to be used to support your favorite charities and charitable causes. *To learn more, please call Jill Metcalf at 619-235-2300 or Kari Breitweiser at 858-385-1595.*



*A will to do good
and the ability to bring it to pass
come together in
Friends of The
Foundation.*

Be part of the answer to
"What's Right with San Diego."
Return the enclosed envelope today.

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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CHAIR'S AND PRESIDENT'S REPORT

*A Report from Colette Carson Royston, RN, MN
and Bob Kelly*

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