

THE SAN DIEGO FOUNDATION

CHAIR'S AND PRESIDENT'S REPORT



A Report to the Community
from **Colette Carson Royston**
(ccarson@san.sdffoundation.org) and **Bob Kelly**
(bob@sdffoundation.org)

October 2003

New Donors Help us Endow San Diego

Donors who choose to establish endowment funds at The San Diego Foundation do an especially beneficial service to the community. Since the principal of an endowment fund can never be touched, the fund advisor is assured that his or her fund will last forever. Increasing the number of endowment funds at The Foundation ensures that funding will be available to meet the needs of the community long into the future. To learn more about establishing an endowment fund, please call Charlene Pryor at 619-235-2300. To learn about converting an existing non-endowment fund into an endowment, please speak with your fund manager.

DOUGLAS HALE MCCOLL, M.D. AND GLORIA DEMERS MCCOLL

Douglas Hale McColl, M.D. and Gloria Demers McColl Fund

Laird Douglas McColl Fund

Leo J. Demers and Mildred C. Demers Fund

Douglas Hale McColl, M.D. and Gloria Demers McColl established three funds at The San Diego Foundation. The first, the Douglas Hale McColl, M.D. and Gloria Demers McColl Fund, is named in honor of Gloria and her late husband. Dr. McColl, a native San Diegan, graduated from Stanford University. He was a general surgeon, who enjoyed his tenure as a teacher of interns and residents at San Diego's county hospital, before it became affiliated with UCSD. He enjoyed the outdoors and was an avid sportsman, particularly enjoying bird hunting. The fund was established to support squamous cell cancer research, MaxoFacial oncological surgical residency fellowship, the ARCO Olympic Training Center, Chula Vista, CA, and to support world-class athletes and gun safety programs.



Douglas Hale McColl, M.D. and Gloria Demers McColl



Laird Douglas McColl

The second fund, the Laird Douglas McColl Fund, is named in memory of the McColl's son, Laird. Laird was a lively child who suffered a congenital heart defect and died at Stanford Hospital undergoing heart surgery as a toddler. The purpose of the fund is to support pediatric cardiology research, neo-natal research, Make-A-Wish Foundation, pediatric cardiac surgical residency fellowships and pediatric cardiology residency fellowships.

The final fund, the Leo J. Demers and Mildred C. Demers Fund, was established in memory of Gloria's parents. Mr. Demers, a great sportsman, enjoyed fishing, yachting, automobiles and horses and passed these passions on to his daughter. Mrs. Demers was an active woman who enjoyed sharing horsemanship, yachting and fishing with her husband and was also a talented gardener. Both were loving parents. The purpose of this fund is to support literacy, horsemanship, seamanship, shooting, construction and automotive causes. Douglas and Gloria named their children successor advisors to these funds.



Leo J. and Mildred C. Demers

Highlights from the 9/17 Board Meeting

- Rafael Arreola presented the Health & Human Services Results Plan and gave an update on the Civil Society Working Group.
- Barry Newman discussed the San Diego Regional Disaster Fund.
- Conny Jamison gave a review of the investment performance results and the endowment asset allocation ranges.
- The Board approved 255 grants to the community, a total of \$1,462,748.41.
- The Board approved three new funds, the Adelaide Allen Fund, the Stanley N. Kamath Fund, and the San Diego Navy League Fund.

Receive this Report via email!

If you would like to save paper and receive this report via email rather than a hard copy mailed to your home or office, or if you already receive this via email and would like to stop receiving the hard copy, please email info@sdffoundation.org and state your preference. To sign up for other email updates or update your e-profile, visit www.sdffoundation.org/contact.

Announcing Formation of Charitable Giving Team

A New Plan for Charitable Giving Support

We are proud to announce the formation of a new team of specialists, the Charitable Giving Team (CGT). The CGT is composed of experienced, knowledgeable professionals who will concentrate their expertise and energy on three types of charitable giving: endowments and planned giving, donor advised funds, and gifts of real estate. The CGT can explain how giving through these charitable vehicles helps donors receive the maximum tax advantages for their gifts and leave a legacy. To reach any of the members of the CGT, please call 619-814-1333.

Charlene Pryor, previously The Foundation's Vice President of Philanthropy, is now Vice President of Endowments and Planned Giving. She will continue to develop and maintain solid relationships with estate planning professionals and senior donors, as well as to encourage other charitably minded seniors to establish endowments at The Foundation. Pryor holds a BS in business administration from the University of Wisconsin - Stout.



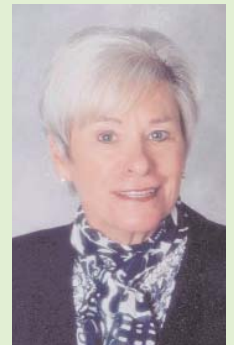
Jill Houska is promoted to Vice President of Donor Advised Funds. She will focus on strengthening relationships with CPAs, tax attorneys, and financial planners and finding new ways for The Foundation to help individuals and families minimize taxes while supporting their favorite charitable

causes. Houska has extensive experience in the nonprofit sector. She has a BA in Economics from the University of California, San Diego and an MBA from the Yale School of Management.

Kari Breitweiser, Director of Donor Advised Funds, will continue to serve the North County community. Her responsibilities include developing and maintaining strong relationships with professional advisors and heightening the visibility of The San Diego Foundation in North County. Breitweiser came to The Foundation from Merrill Lynch. She earned her BS and MBA from the University of the Pacific in Stockton, CA.



Berit Durler joins The Foundation as Executive Director of The San Diego Charitable Real Estate Foundation. She has extensive experience in real estate development and lending, financial management, and business development. Her experience includes serving as COO for The Tom Hom Group and for UCSD Extended Studies and as Senior Vice President and Manager, Residential Lending for Pacific First Bank. Durler received her BA in International Relations and International Trade from the University of Southern California and her MBA from San Diego State University.



The San Diego Women's Foundation Reaches 200 Members!

The San Diego Women's Foundation (SDWF) reached 200 members on its third anniversary. Started in 2000 by founding President Linda Katz, SDWF is a diverse and informed community of women who are personally engaged in improving our region by pooling their philanthropic resources. Through a democratic process SDWF members grant significant funds and foster relationships with the nonprofit community in the San Diego region. SDWF builds for the future by involving generations of women and growing their endowment.



Julie Dubick, President

Within their first three years of existence, SDWF has made 14 grants totaling \$389,000 into the San Diego community. SDWF has grown its endowment to over \$480,000. SDWF board members this year are as follows: Julie Dubick, President; Darcy Bingham, Education Chair; Becky Clelland, Finance Committee Chair; Judy Radke, 1st Vice President;

Sigrid Pate, Nominating & Governance Chair; Christa Burke, Grants Chair; Gayle Tauber, Marketing Chair; Alicia Foster, Membership Chair; Linda Katz, Member at large; Karen Mercaldo, Member at large; Constance Carroll, Member at large. To learn more about SDWF, please visit www.sdfoundation.org/sdwf.



Linda Katz, founder

Arts & Culture Working Group Adds New Members

Our Arts & Culture Working Group is off to a great start with nine members (and one ex-officio), community leaders with a wide variety of talents and credentials. They are as follows:



Roger Cornell, M.D., Chair. Dr. Cornell has practiced dermatology with Scripps Clinic for 30 years. He has served on volunteer boards including the City of San Diego Commission for Arts and Culture for eight years, the San Diego Performing Arts League, and the UCSD Art Gallery, and is currently on the boards of Mingei International Museum and the Alliance Healthcare Foundation.

Elizabeth Y. Yamada, Vice Chair. An avid volunteer, Elizabeth serves on The San Diego Foundation Board of Governors, Community Partnerships Committee and Civil Society Working Group as well as numerous other arts and culture organizations in the San Diego region.

Dr. Martha Dennis. Dr. Dennis is a Venture Partner with Windward Ventures. She is President of the Board of Directors of the San Diego Telecom Council and Vice President of the Board of Trustees of the Reuben H. Fleet Science Center. She serves as chair of the City of San Diego Science and Technology Commission and is on the boards of the San Diego Economic Development Corporation, San Diego Chamber of Commerce, and The San Diego Foundation. She is an Advisory Director of the San Diego Opera and an Emeritus Board Member of the La Jolla Chamber Music Society.

Peter Ellsworth. Peter practiced law in San Diego for 30 years and served as President & CEO of Sharp Healthcare for 10 years. He has been involved with the San Diego Opera and various institutions in Balboa Park. He also serves as Chair on the Board of Directors of the Legler-Benbough Foundation.

Tom Hall. Tom served as Managing Director of The Old Globe Theatres for 20 years. He is now a Principal for AlbertHall&Associates, a national consulting firm that specializes in executive search and management development initiatives for arts organizations. Tom has been involved in San Diego's arts community for more than 25 years.

Victoria Hamilton. Victoria has been the Executive Director of the City of San Diego Commission for Arts and Culture since its inception in 1988. With nearly thirty years experience as an arts administrator, she has served in similar positions for the County of Santa Barbara, California and the City of Tacoma, Washington. Victoria served on the executive committee of the Americans for the Arts, formerly National Assembly of Local Arts Agencies, was President of the California Confederation of the Arts and Chair of the California Assembly of Local Arts Agencies.

Judith Harris. Judith served as chairwoman of the City of San Diego Commission for Arts and Culture for three years, and was on the commission for eight years. She has chaired fundraising capital campaigns for the Scripps Memorial Cardiac Clinic and KPBS, as well as serving on the boards of the San Diego Museum of Contemporary Art, Scripps Foundation, La Jolla Playhouse and the Center for Community Solutions. She recently co-chaired the capital campaign, and recently completed the endowment campaign for the City of San Diego Animal Welfare Complex. Mayor Susan Golding declared October 2, 2000 "Judith Harris Day" for her activism and volunteer efforts in the San Diego community.

Michael Inzunza. Michael has served on the City of San Diego Commission for Children, Youth and Families, was District Director for Supervisor Cox, a member of The San Diego Foundation Scholarship Committee and the International Community Foundation bi-national scholarship committee. A long-time resident of the South Bay, Mike is the Editor in Chief of *Blurb* magazine, written for and by teenagers for the Sweetwater Union High School District.

Fiona Tudor. Fiona is currently Executive Director of both the Farrell Family and ResMed Foundations. In addition, Fiona serves on the boards of the Athenaeum and Barrio Logan College Institute. While living in Orange County, Fiona was a member of the board of the Orange County Performing Arts Center. In San Diego, she has been Director of Development for the Sidney Kimmel Cancer Center, Vice President of Development and Communication for the Sharp HealthCare Foundation and Director of Development for the La Jolla Chamber Music Society.

Colette Carson Royston, RN, MN (Ex-Officio). Colette is current Chair of The San Diego Foundation's Board. She is known for her professional work in the field of health care, and over the past 25 years has served as an oncology clinical practitioner, researcher and educator. She is currently a special advisor for clinical affairs at the Sidney Kimmel Cancer Center and consults for numerous biotechnology and pharmaceutical companies. Colette is involved in the local arts and culture sector, where she serves on the boards of the San Diego Museum of Contemporary Art and The San Diego Opera.

Leave a Legacy!

Remember The San Diego Foundation in your will, trust, retirement account, or insurance policy. Give us a call at 619-235-2300 to learn more about how convenient and effective your charitable giving can be.

Balboa Park Rose Garden Receives High Honor

The World Federation of Rose Societies has voted the Inez Grant Parker Memorial Rose Garden in Balboa Park one of the top 12 rose gardens in the world! Only one other American garden won this award.



Congratulations to Balboa Park Horticulturist Kathy Puplava and her staff. The San Diego Foundation Balboa Park Advisory Committee made a grant last year of \$8,750 towards a major garden improvement project, which was completed in early summer. The committee also granted \$4,940 for the installation of an interpretive kiosk, located at the garden's entrance. To learn more about this exceptional honor, please visit www.worldrose.org/awards/gardens.html.



Open a Charitable Giving Fund and Support Your Community

A charitable giving fund at The San Diego Foundation offers maximum flexibility to help you achieve your charitable goals. As San Diego's Center for Charitable Giving, we provide you with a philanthropic advisor and in-depth knowledge of the community issues you care about most. You can benefit from knowing more about The San Diego Foundation. Give us a call at 619-235-2300 to begin reaching your charitable goals.

Another option for you to consider . . .

Become a Friend of The Foundation!

Be part of the answer to "What's right with San Diego?" Become a Friend of The Foundation, our annual membership program designed to support The Foundation's work: promoting and increasing charitable giving in our region. With a small contribution, Friends are able to share in our mission of improving the quality of life in all of San Diego's communities. Friends will enjoy invitations to special meetings, receptions, and convenings as well as access to community leaders and fellowship with other Friends. You care about San Diego. You belong in Friends. Become a Friend of The Foundation by returning the envelope inside this report. Or call Sara Wilensky at 619-814-1338 to learn more.



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

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Become a Friend of The Foundation

The Friends of the Foundation is a group of individuals and organizations who provide annual support for The Foundation's priorities and programs. Friends of The Foundation enjoy invitations to special meetings, receptions, and convenings designed to provide key information on community needs and issues, as well as access to community leaders and fellowship with other Friends.

Please check your desired level of commitment.

- Friend.....\$100
- Leader.....\$250
- Patron.....\$500
- Benefactor.....\$1,000
- Partner.....\$5,000
- Community Builder.....\$10,000

Please charge my ____ Visa ____ Mastercard

Card # _____ Exp. ____/____/____

Name on Card _____

Signature _____

NOTE: Please fill out address information above.

My check of \$ _____ is enclosed. *(Made out to The San Diego Foundation)*

Your contribution will travel far into the future to create solutions to our community's most perplexing problems.

Please contact me regarding:

- Becoming a Friend of The Foundation.
- Establishing a Charitable Fund.
- Leaving a Legacy/Bequest to The Foundation.
- Receiving Research Reports on Nonprofit Organizations.
- More information about The San Diego Foundation.

Name _____ Phone _____

Address _____ Email _____

City _____ State _____ Zip _____ Best time for us to reach you: _____

Please fax this completed form to 619-239-1710.