

Foundation Focus

A Journal of The San Diego Foundation | Spring/Summer 2008

COMMUNITY
LEADERSHIP

LEADERSHIP
& LEGACY

CIVIC
ENGAGEMENT



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The San Diego Foundation

Founded in 1975, The San Diego Foundation's purpose is to improve the quality of life in all of our communities by promoting and increasing charitable giving that is effective and responsible. The Foundation manages over \$550 million in assets, almost half of which resides in permanent endowment funds benefitting the San Diego region for generations to come.

Letter from the Chair



Community Leadership.....Leadership and Legacy.....Civic Engagement. These core areas form the cornerstone of The San Diego Foundation; they support our mission and drive our important role in the region...to convene and engage members of the community for the purpose of improving the quality of life for all San Diegans by promoting and increasing effective philanthropy.

This issue of Foundation Focus takes a close look at a number of reports generated

from The Foundation, to aid and provide the community with tools and knowledge to convene forums and lead initiatives throughout the region. The **After-The Fires Community Needs Assessment** was developed after the devastating wildfires, which displaced a record 500,000 people from their homes. In addition to people banding together to provide food and shelter for strangers, a record number of donations also came in from around the country, including close to \$10 million here at The Foundation. With the crucial information gathered in this report, many organizations throughout the area, The Foundation included, are now hard at work on the long process of accessing and meeting the numerous continuing needs throughout San Diego County.

The preservation and long-term maintenance of Balboa Park are the focus of the recently released **Balboa Park Study** and **The Balboa Park Trust Report**, which is celebrating its \$1 million endowment. The Foundation also released the **Community Compass Report** in alignment with **What's Working, A Guide To Effective K-12 Math and Science Education in San Diego County**. This report was recently previewed by many of our leaders in the Science and Education sectors and opened several avenues for continued debate and action on improving the quality of education for these focus areas.

And one final note regarding the fires...as time passes and the headlines fade, it's easy to forget how we linked arms as a community and helped each other get back on our feet and rebuild our communities. As we quickly come upon the one year anniversary of the fires, reflect on a feeling that you hopefully experienced...of helping others who may not be as fortunate, helping those who need a hand, or simply being a caring neighbor.

Warm wishes,

Jack Raymond, Board Chair

The San Diego Way

Neighbors helping neighbors ... this is what we call The San Diego Way. During the 2007 fires, this remarkable characteristic of the people of the San Diego region was broadcast to the world. Altruism, volunteerism, heroism and charitable giving are the pattern of a strong social fabric, much to be encouraged for the wellbeing of a community. This is what holds us together in good times and bad.

Not only during a disaster, but also day by day in the lives of community members, San Diegans give. They give money. They give time. And they give of their talents. This is what we do here in San Diego. This is our way ...The San Diego Way.

This inclination to work together also finds expression in civic engagement. The spirit of The San Diego Way can be felt when organizations decide to collaborate, choosing synergy over competition. Four renowned research institutes have chosen to work together to build a center for regenerative medicine, illustrating the central principle of a civil society: communities coming together to find solutions.

And it took engaged leadership to make this happen. Three giants of the philanthropic sector got involved – Malin Burnham, John Moores and Irwin Jacobs – providing the encouragement and support to bring all parties together. They must have believed that what will be accomplished together by these organizations will be well beyond what could have been achieved separately.

As a component of our community leadership, The San Diego Foundation is committed to building a Fund for the Common Good. This endowment will provide for the emerging needs of the communities in our region with enduring yet flexible grantmaking. Many individuals, families and organizations continue to contribute to this important fund. In this way, The Fund for the Common Good is itself another expression of The San Diego Way ... neighbors helping neighbors today and always.

THE SAN DIEGO FOUNDATION IS DEDICATED TO IMPROVING THE HEALTH, WELLBEING AND SELF-SUFFICIENCY OF INDIVIDUALS, FAMILIES AND COMMUNITIES IN SAN DIEGO COUNTY.



By closely monitoring local issues, The San Diego Foundation has an understanding of the region's challenges, and the areas where our grantmaking can help solve complex problems. Together with our donors, The Foundation has granted out over **\$91 million** over the last 10 years to address public health issues including hunger, homelessness, obesity, access to health and dental care, and environmental health.

The Foundation was recently honored with the **Theme Award** by the County of San Diego, Health and Human Services Agency. This award honors a Public Health Champion dedicated to focusing on these vital areas. The San Diego Foundation is honored to receive this award as we continue our work of improving the quality of life for all who live in San Diego.



LEGACY LEAGUE

Honoring those whose gift plans include the San Diego community. If you have included The San Diego Foundation in your estate plans you are eligible to become a member of The Legacy League. Let us know more about how The Foundation is included in your plans so we can recognize your support and say *"Thank You."*

Contact Amy Walling at 619-235-2300 or email amy@sdfoundation.org

CHARITABLE
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TIMING IS EVERYTHING.

Act NOW before the rates drop on July 1st.
Call Amy Walling at 619-235-2300 for an illustration

Endow San Diego Reaches a Record Milestone!

Since July 1, 2005, *Endow San Diego* has engaged **240 Endow Partners** and generated **266 new endowments**: 187 residing at The Foundation and 79 among our Endow Partners. Of these endowments, 103 were established by individuals, with the balance established by organizations. These **new endowments now total over \$141 million**, with over \$26 million held at The Foundation and over \$115 million spread throughout the community.

This program was made possible by the generous support of



PROFESSIONAL Advisor Corner:

How Can I Recommend *Charity* Without Recommending a *Charity*?

It's a delicate dilemma. Estate planners, financial planners, and other professional advisors are often faced with a delicate dilemma: you want to discuss the many benefits of charitable giving with your clients, but you want to avoid recommending specific charitable causes or obligations.

Fortunately, there's a simple solution. The solution is your local community foundation, The San Diego Foundation. A community foundation is a single, trusted vehicle your clients can use to address the issues they care about most, while gaining maximum tax benefit under state and federal law.

Contact Us For more information about The San Diego Foundation, please visit our website at www.sdfoundation.org

Visit our Professional Advisor Center at www.sdfoundation.org/resources



Adrienne D. Vargas
Vice President
Charitable Giving
Call (619) 235-2300 or email
adrienne@sdfoundation.org



Simona Valanciute
Director
Charitable Giving
Call (619) 235-2300 or email
simona@sdfoundation.org



Amy Walling
Director, Endowment
Operations, Gift Planning
& Research
Call (619) 235-2300 or email
amy@sdfoundation.org

Endow Partner SUCCESS STORY

San Diego Junior Theatre Gives itself a 60th Anniversary Gift: An Endowment with The San Diego Foundation

For 60 years, San Diego Junior Theatre (SDJT) has enhanced the lives of generations of San Diego's families by providing high-quality theatre education and productions to youth of all ages and cultural backgrounds.

In 2007, the Board of Trustees gathered to plan for the appropriate celebrations to mark the 60th anniversary milestone. It was decided that the long discussed plan of starting an endowment to provide lasting support and funding should finally become a reality.

According to SDJT Board of Trustees President David Braun, "Starting an endowment to coincide with our 60th anniversary just makes sense. As an alumnus of the organization myself, I attribute much of my personal success to the life lessons Junior Theatre taught me, and I want to assure that

the program continues to enrich lives for many future generations."

Their vision became a reality when in January, 2008 the San Diego Junior Theatre established their agency endowment fund at The San Diego Foundation and joined the Endow Partnership.

Within a few days of finalizing their endowment, Mary E. Oswell, San Diego Junior Theatre alumna, volunteer and former Board of Trustees member, became the charter donor to the endowment. Having been involved with SDJT for almost 30 years, Mary Oswell had waited for the right vehicle to make a major impact on an organization that has so greatly influenced her life, and the lives of many San Diegans.



SDJT educational program participants.
Photo credit Tim Whitehouse



Lori Finch, Resource and Development Manager, OSP.
For more information about how you can become an Endow Partner, please call Lori Finch at (619) 235-2300 or e-mail lorig@sdfoundation.org



School House Rock (2008)
Photo credit Ken Jacques



Future SDJT alumni
Photo credit Tim Whitehouse

Endow Your Community

The *Endow Your Community* effort has continued to grow out of the region-wide *Endow San Diego* movement, and over the past year there has been incredible growth throughout the region. Each Foundation informs and inspires San Diegans about the benefits of endowments, and provides charitable funds for current and future community needs. Visit EndowYourCommunity.org for more information.



www.EndowCarlsbad.org



May 2007 Launch Event. From left to right: Becky Smith, Farrah Douglas, Kevin Skjel.

and commitments, with a focus of benefiting nonprofits and organizations serving the Carlsbad community.

Under the direction and commitment of Chair Knox Williams, the Carlsbad Charitable Foundation has reached a milestone of 100 Founding Members! These members are critical in the Foundation reaching another milestone of over \$500,000 in contributions



www.EndowChulaVista.org



Cheryl Cox
Chula Vista Mayor

A major goal is now within the reach of The San Diego Foundation with the launching of the Chula Vista Community Foundation. We are fortunate to have Chula Vista Mayor Cheryl Cox exercising key leadership in this new endeavor to broaden our reach and share our message about the benefits of endowments in the South Bay. Excitement is growing around the creation of the CVCF, so be on the lookout for more information about how you can become involved in creating charitable funds that will focus on community needs now and in the future throughout South County San Diego.

Under the direction of Chair Ken Lounsbery, the Escondido Charitable Foundation has grown to 120 members, and over \$715,000 has been raised in contributions and commitments, including \$25,000 from the City of Escondido, \$50,000 from County Supervisor Pam Slater-Price and \$20,000 from The Escondido Rotary Foundation.

The Foundation celebrated its first Grant Celebration in November 2007, granting over \$90,000 exclusively to Escondido nonprofits and causes, focusing on Youth Education and Youth Services.

The 2008/09 focus is Healthy Lifestyle Choices, with the goal of making Escondido one of "America's Healthiest Cities."

In recognition of all that the Escondido Charitable Foundation has accomplished, on June 6, 2008, the Escondido Chamber of Commerce will present the Foundation with an award for Community Organization of the Year.



2007/2008 Grant Recipients.

Recent News From the Community



www.Endow4S Ranchdelsur.org



Board members David Li, Carol Mutter, Scott Voak, Adriana Amon, Randy Koch, Maryory Contreras, Ray Shay.

In less than one year and under the direction of Chair Ray Shay, the 4S Ranch~Del Sur Community Foundation has expanded to 37 members, and has over \$80,000 in contributions and commitments to benefit 4S Ranch~Del Sur and its surrounding communities, focusing on children, schools and community safety.

Recent events included their Easter Egg Hunt as well as a gathering for local business and community leaders.



www.Endowrb.org



Back Row (L to R): Steve Riddle, Tom Cook, Anthony Lasi, Nancy Canfield, Jane Harmon Front Row (L to R): Karen Rott, Carol McDaniel Gibson, Carolyn Hess

Led by Chair Steve Riddle, the Rancho Bernardo Community Foundation has over a quarter of a million dollars in their endowment fund, with a focus on funding projects and programs that benefit the Rancho Bernardo community.

The RBCF's primary grant focus is in the area of Capacity Building through its Impact Grant. The 2008/09 grant guidelines will be released in mid Summer 2008.



www.EndowOceanside.org



New members- Margaret Ulloa, Sandy Todd, Mary Villela, Joe Villela, Nadine Scott

The Oceanside Charitable Foundation now has 44 members, over \$200,000 in contributions and commitments, and has recently formed its membership and grants committees under the direction of co-chairs Colleen O'Harra and Tom Nunan.

A recent meet and greet event was held at the offices of television station KOCT for local community leaders, businesses and nonprofits, to find out more about the OCF and its effort to improve the quality of life for all residents of Oceanside.

UPCOMING EVENTS

THE ESCONDIDO CHARITABLE FOUNDATION

Grant Application Deadline

May 29th, 2008 at 5:00 pm.

Please contact Kerry Helmer at 619-814-1384, or kerry@sdfoundation.org

Escondido's Legacy Takes Center Stage

The 2nd Annual Membership Reception

May 15th, 2008 from 6:00-7:00 pm at

The California Center for the Arts, Escondido.

Please contact Megan Cambon at 619-814-1362, or megan@sdfoundation.org

4S RANCH - DEL SUR COMMUNITY FOUNDATION

1st Grant Celebration - June 7th, 2008

Please contact Megan Cambon at 619-814-1362, or megan@sdfoundation.org

THE RANCHO BERNARDO COMMUNITY FOUNDATION

The Pathway of Pride- June 10, 2008.

Please contact Megan Cambon at 619-814-1362 or megan@sdfoundation.org



Pilar Montoya

Vice President,
Regional Outreach
Call (619) 235 - 2300 or email
pilar@sdfoundation.org



Heather Dugdale

Regional Manager,
North County Inland
Call (858) 385 - 1595 or email
heather@sdfoundation.org



John J. Duca

Regional Manager,
North County Coastal
Call (760) 269 - 3882 or email
john@sdfoundation.org

MONARCH
SCHOOLRESTORING HOPE &
UNLEASHING DREAMS

Thanks to the generosity and inspiration of Joann Weinstein, the Monarch School, located in downtown San Diego, has a new state of the art sewing machine that is changing the way its students create art and conduct business.

Monarch is a school for homeless and at-risk-kids where students participate in the Butterfly Enterprise program. They design, create and sell items such as embroidered towels, and bead jewelry, with proceeds benefiting the students and serving as investment capital to help launch new product lines.

Joann Weinstein, a donor with The San Diego Foundation, visited

Monarch and noticed that the kids in the program did not have enough machines to keep up with the large number of orders they were receiving. She and her husband Marc decided to make a specific donation that would have an impact in enabling the kids to be more productive...the Babylock BMP8 sewing machine. Because of the machine's multiple abilities, the kids are now creating products more quickly and are already dreaming of expanding their product lines

Monarch is very grateful to the Weinsteins and The San Diego Foundation for supporting a program that helps kids learn the importance of a strong work ethic,



Monarch students Miguel and Dilva use the new high tech machine to create colorful Butterfly Enterprises products.

while honing the life skills needed to succeed in today's competitive environment.

If you would like to learn more about Butterfly Enterprises, please visit their website at www.monarchschoools.org.

MARCOM COUNCIL FORMS



Left to Right: Sara Wilensky Napoli, Anna-Marie Rooney, Cecille Jones, Charles Foster, Jenifer Barsell, Bill Geppert, Fred Baranowski, Sandy Perlatti, Lisa MacLarty and Barbara Zelnick. **Not pictured:** Lynn Allen-Biros, Mark Shults and Greg Joumas.

March marked the launch of a new Foundation committee focusing on The San Diego Foundation's marketing and communications. Bill Geppert chairs the new MarCom Council. MarCom Council members include senior professionals from a diverse range of companies and communications disciplines. The Council was formed to provide a forum for gathering fresh perspective as well as savvy insight for The Foundation's messaging, outreach, and positioning.

Welcome to the Members of the MarCom Council!

Bill Geppert, *Chair Senior Vice President and General Manager, Cox Communications*

Lynn Allen-Biros, *Community Affairs Manager, Amylin Pharmaceuticals, Inc.*

Fred Baranowski, *Senior Vice President and Regional Manager, 1st Pacific Bank*

Jenifer Barsell, *Director of Marketing, San Diego Padres*

Charles Foster, *Principal, Blankinship & Foster*

Cecille Jones, *Practice & Industry Marketing Manager, DLA Piper US LLP*

Greg Joumas, *Vice President of Advertising and Marketing Communications, Jack in the Box*

Lisa MacLarty, *Director of Communications, Barney & Barney*

Sandy Perlatti, *Senior Vice President - Corporate Communications, The Corky McMillin Companies*

Mark Shults, *Area Manager, AT&T Connected Communities*

Barbara Zelnick, *Silicon Valley Marketing & Communications Veteran*

Staff: **Anna-Marie Rooney**, *Vice President of Marketing & Communications, The San Diego Foundation*

Faces
&
Places

Local civil rights icons, Richard Butcher, MD; Ashley Walker; and Vickie Butcher with pioneering artist-activist, Odetta.



Local civil and women's rights icon, Gracia Molina de Pick shared memories of San Diego's own civil rights history.

**Cheryl Alethia Phelps**

Director, Civil Society Analysis & Strategy
Call (619) 235-2300 or email cheryl@sdfoundation.org.



More than 300 people enjoyed the exhibit of historic Civil Rights images presented on the eve of Martin Luther King Day, 2008. Birmingham-native Odetta was The Foundation's special guest at the *Unseen. Unforgotten.* exhibition of the lost Birmingham News photographs of the turbulent civil rights era.



Odetta, known as the "Voice of the Civil Rights Movement", sang at the 1963 March on Washington and the 1965 Selma to Montgomery March. She was hailed by Dr. King as the "Queen of American Folk Music."

THE FREEDOM RIDERS EXHIBIT

Special preview of the traveling exhibition of lost civil rights photographs from the archives of The Birmingham News...

Unseen. Unforgotten.

...and powerful images of San Diego's untold civil rights history.



Tuesday, Jan. 22 - Saturday, Jan. 26, 2008
at The San Diego Foundation



Freedom Riders Reception

The Freedom Riders Reception, brought together the major conveners of Martin Luther King Day events throughout the region, as well as many of San Diego's own social justice pioneers and icons. This special reception marked the occasion of an exclusive preview of never-before viewed civil rights photographs discovered in 2006 in Birmingham, Alabama. The Foundation was honored to welcome the legendary folk singer, Presidential Medal of Arts recipient, and keynote presenter at the All People's Breakfast, Odetta. The exhibit, *Unseen. Unforgotten.* was displayed for a week in the lobby of The Foundation, prior to moving to City Hall. The exhibit was made possible by a grant from the Civil Society Working Group of The San Diego Foundation in keeping with their mission to promote civility and community throughout the San Diego region.



Caring for the Common Good

Friends of The Foundation is a membership program of The San Diego Foundation that supports the Fund for the Common Good and our Community Impact Grants.

Friends of The Foundation is an easy and effective way to support nonprofit organizations working to provide lasting solutions to community issues, enhancing the common good of our region.

Friends may give to address a particular priority area or for greatest community needs, allowing The Foundation to invest their donation where it is needed most. Either way, a gift to Friends of The Foundation is a gift to the entire community.

**MAKE A DIFFERENCE.
BECOME A FRIEND OF
THE FOUNDATION TODAY!**

JOIN US AT THE LUX ART INSTITUTE!

Become a Friend of The Foundation
by May 7, 2008, to be invited to:

Art and the Environment:

Behind-the-Scenes at the Lux Art Institute

May 14, 2008 • 6:30 p.m. – 8:30 p.m.



The evening begins in the pied à terre of artist-in-residence Julie Heffernan. You'll join other "Friends" for cocktails and conversation to hear how The Foundation is shaping a new San Diego through exciting programs in art, culture, and the environment.

You will take a guided tour of Ms. Heffernan's exhibit which includes elaborate self portraits that re-envision our relationship to nature and are reminiscent of Baroque-era paintings. Nestled high into the hillside, the walls of the gallery open to extend the art experience outside with views of the native gardens and the evening sunset.

**For more information or to
RSVP for the event, please
contact Ruth Ambriz at
ruth@sdfoundation.org
or call 619-235-2300.**



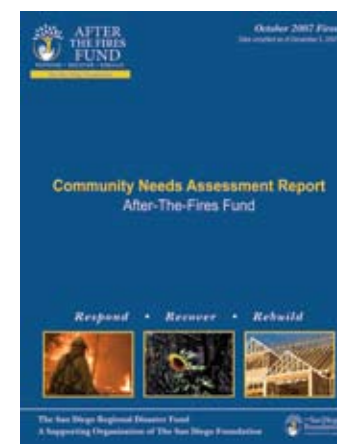
Felicia Shaw
Director, Arts & Culture
Analysis & Strategy
Call (619) 235-2300 or email
felicia@sdfoundation.org.

Community Leadership



The San Diego Regional Disaster Fund

The Community Needs After-The-Fires Assessment Report



The Community Needs Assessment Report was released in December 2007 by the San Diego Regional Disaster Fund (SDRDF), providing the first comprehensive look at the fire-stricken communities region-wide. The report cites four areas of focus for fire relief: survivor needs, community rebuilding, the environment and preparedness. Six needs emerged from the assessment: long-term recovery operations support, housing, counseling, case management, assistance with insurance claims, and habitat restoration.

The report also details needs specific to each of the fire-affected communities. Identification of these issues aids the formation of priorities for grantmaking in the recovery and rebuilding phases of the After-the-Fires effort as well as serving as a guide to other funders throughout the region.

"This assessment was the first major step in implementing our informed disaster philanthropy approach," states Dr. Ted Chan, Board Chair of the San Diego Regional Disaster Fund, which governs the After-the-Fires Fund 2007. "It formed a baseline and starting place for the effective distribution of the funds donors have entrusted to the After-the-Fires 'recovery and rebuilding' effort." To date, close to \$10 million dollars has been received, with \$4.5 million granted back into the communities of need, with additional commitments of \$1.5 million.

To compile this report, the SDRDF reassembled a team from the 2003 Community Needs Assessment effort, and convened community leaders and volunteers who worked on the recovery and response efforts following the 2003 Wildfires. The team members moved into the fire-affected areas beginning November 5th, gathering on-the-ground data and interviewing relief center personnel, nonprofit organizations, fire victims, residents, volunteers, and community leaders. To view the entire 2007 Community Needs Assessment Report, visit www.sdfoundation.org.



Photo courtesy of Fred Greaves
Photography

AFTER-THE-FIRES SCHOLARSHIP SUCCESS

The San Diego Foundation administers the largest non-university-based scholarship program in San Diego County. Since its establishment in 1997, the Community Scholarship Program has awarded over \$10 million to thousands of students in need of financial assistance. Christian Garcia is one of those students who not only was affected by growing tuition costs, but by the 2003 and 2007 wildfires as well.

Christy grew up on the San Pasqual Indian Reservation and attended Valley Center High School. The morning

of October 25, 2003 changed her life forever, destroying her home and her community. She described her loss as an opportunity to improve and succeed. With no money for college, Christy heard about and applied for a scholarship at The Foundation. She received \$24,000, which helped her get through college without loans.

Currently a senior at the University of San Diego studying Ethnic Studies and Psychology, Christy will realize her goal of graduating in spring 2008. She says, "It's like a dream come true."



Christian Garcia- San Diego Fire
Victim Scholarship Recipient

Community Compass:

Aligning Support to Improve K-12 Math & Science Education for Our Students

The Community Compass: K-12 Math and Science Education is a project of The San Diego Foundation's Science & Technology Working Group (STWG), through which a report, *"What's Working: A Guide to Effective Programs in K-12 Mathematics and Science Education in San Diego County,"* researched and written by Building Science and Engineering Talent (BEST), was commissioned, vetted and published. The draft was reviewed on April 7, 2008 by leaders in education, business, philanthropy and government, led by Qualcomm Founder Irwin M. Jacobs, Ph.D., and San Diego County Office of Education Superintendent Randolph E. Ward, Ed.D., in a panel moderated by Gloria Penner of the KPBS Editors Roundtable. More information is available at www.sdfoundation.org.



Stephen Weber, Ph.D., President of SDSU, summarizes comments gleaned from table discussion.



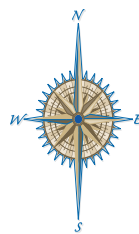
BEST Chief Executive Officer and "What's Working" report author, John Yochelson, responds to the audience.



Since 2003, The Foundation has made a difference through targeted program grants in K-12 education, but we are also keenly interested in understanding what works and where leverage can be created. Many organizations in San Diego share The Foundation's interests in developing a more robust pipeline to foster our region's science talent. It will take leadership to encourage more alignment around successful programs for the benefit of the 500,000 children in our public schools.

Community Compass also produced its own report, *"Community Compass: Aligning Support to Improve K-12 Math & Science Education for Our Students,"* to identify, inform and inspire action on critical issues facing our region. To provide community leadership, we will continue to serve as knowledge brokers, grantmakers and convenors while sharing information about best practices by funding research for more informed decision-making.

The STWG engaged BEST to evaluate the effectiveness of science and mathematics educational programs in the *"What's Working"* report, which outlines a direction for taking action that leverages



proven areas of success. These are detailed under four priority areas in the K-12 sector in which the community can make a significant impact: 1) building math and science teacher capacity; 2) supporting the learning environment by focusing on classroom and school-based initiatives; 3) supporting informal education and out-of-school community-based enrichment programs; and 4) fostering regional shared goals and learning opportunities through system-wide connectivity.

Participants at the April 7th forum noted that private funding pales in comparison to public funding in education. Therefore, our efforts must be coupled with strategies of influence and leverage, along with direct program support. This might include supporting school funding, major education policy initiatives, or local networks to break down barriers to reform.



Left to Right: Jerry Hoffmeister, Sedra Shapiro, Randy Ward, Ed.D., Gloria Penner, Irwin Jacobs, Bob Kelly, Jack Raymond.

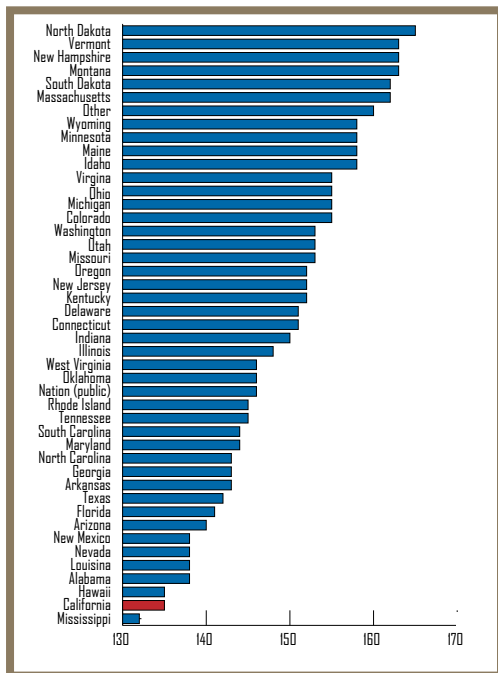
Companies and philanthropies can make a difference by directing their funds strategically. To make this a reality, we ask business and nonprofit leaders to:

- Focus on programs with impact
- Align philanthropic support for greater strategic impact.
- Share intelligence about what works and what piece of what works you are willing to adopt.
- Endow key nonprofit organizations to sustain their work.
- Expand the funds and resources to make this happen.

San Diegans need to think critically, and perhaps self-critically, about what it will take to make our region a national leader in K-12 math and science education. The sponsors and The Foundation take pride in providing what we hope will be a catalyst for much deeper collaboration going forward.



Denise Lew, Ph.D., and Duane Roth participate in table discussion.



California 8th grade science scores are nearly the lowest in the nation.

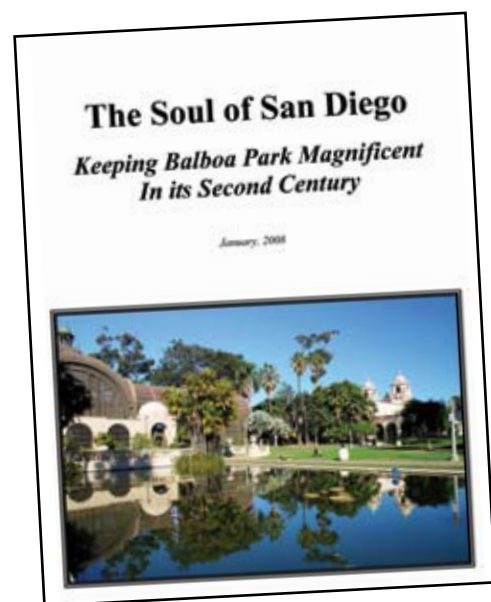
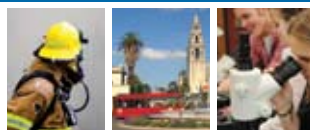
Connie Matsui, Executive Vice President of Corporate Strategy and Communication at Biogen Idec, welcomes the Compass Forum attendees. >



The Community Compass and What's Working reports are part of The San Diego Foundation's community leadership activities, which extend beyond strategic grantmaking. Sharing information and providing clear analysis, as well as communicating information regarding effective programs and best practices, are the cornerstones of The Foundation's Community Compass approach. Both reports are available for download at www.sdfoundation.org.



Sedra Shapiro
Associate Vice President,
Community Partnership
To contact Sedra, call
(619) 235-2300 or email
sedra@sdfoundation.org.

Community
Leadership

Balboa Park News:

Balboa Park Study

In January 2008, a new study on Balboa Park was released to the public. The Soul of San Diego report was prepared by the *Trust for Public Land in Washington, D.C.*, and the *Keston Institute at the University of Southern California*. Funding for this study was provided by the *Legler Benbough Foundation*, the *Parker Foundation*, and *The San Diego Foundation*.

Report findings reflect input from 2,800 visitors to Balboa Park, an examination of the park's financial support, and a study of the park's present and future needs. All of the studies were commissioned for the purpose of providing the factual basis on which a public discussion could be held and appropriate decisions made for the future of the park. For the complete report, please visit our website at www.sdfoundation.org



Balboa Park Trust

A new name will fly over a longstanding effort to preserve one of San Diego's cultural and historical landmarks: **The Balboa Park Trust**.

Previously known as the **Balboa Park Endowment Funds**, the **Balboa Park Trust** was recommended by an internal committee, now known as the Balboa Park Trust Committee, who advise Park funds for The San Diego Foundation. They are seeking to significantly increase the size of endowments benefiting Balboa Park. The name is new but the Trust's history of help to the Park is long and productive. Audio tours, flower displays, more efficient watering systems, fountain repairs, trail markers and historic plaque restorations are just a few of the projects made possible by the Trust. Since 1989, over \$1 million in grants

have also supported celebratory events such as *Balboa Park December Nights* (formerly called Christmas on the Prado).

The first fund in the Balboa Park fund family was established in 1978 through a legacy of Florence Christman, author of "The Romance of Balboa Park." The accumulation of 22 different funds helped build the total value of the Balboa Park Trust to over \$3 million from the first founding gift of \$78,000. Today, the principal of the trust yields approximately \$100,000 annually to benefit the Balboa Park Trust.

**Marisa Quiroz**

Manager, Fund Services
Call (619) 235-2300 or email
marisa@sdfoundation.org.

Bank of America Partners with The San Diego Foundation to Tackle Climate Change

The San Diego Foundation is pleased to announce that Bank of America has awarded \$250,000 to support The Foundation's efforts to stabilize local greenhouse gas emissions and reduce our vulnerability to the harmful effects of climate change.



"This is the first and largest package of environmental grants Bank of America has made here in California as part of its new Environmental Initiative," Janet Lamkin, President of Bank of America California, said. "It grew out of our working relationships with Mayor Sanders and local environmental organizations, and it represents a huge investment in San Diego and particularly in the Mayor's efforts to make this the greenest city in the world."

TSDF is one of four local recipients for the first set of grants since Bank of America announced its \$20 billion ten-year Environmental Initiative to reduce climate change.

"This grant from Bank of America will boost our efforts to increase public awareness and support for local climate action," stated Emily Young, Ph.D., director of TSDF's environment program. "It also supports our work to address climate change with local governments, and to develop and support positive "green" economic growth opportunities in our region."

San Diego Mayor Jerry Sanders joined Bank of America to announce the \$500,000 in "green" grants as part of the city's overall strategy to increase environmental sustainability in the region. The other recipients include the San Diego Regional Economic Development Corp., La Maestra Community Health Center, and the California Center for Sustainable Energy.



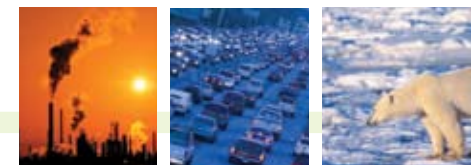
Bank of America's "green" grants are part of an overall strategy to increase environmental sustainability in the San Diego region. Photo courtesy of Joanne DiBona



The San Diego Foundation launched Climate Smart in partnership with the San Diego Natural History Museum, Birch Aquarium at Scripps Institution of Oceanography, California Center for Sustainable Energy, and Reuben H. Fleet Science Center to raise public awareness and galvanize local action around climate change. Visit www.sdfoundation.org/communityimpact/environment to learn more.

WHAT YOU CAN DO

- Make personal choices that matter. Conserve energy and water, reduce auto pollution, and recycle.
- Encourage local, state and federal government representatives to adopt more vigorous measures to curb global warming and prepare for the future.
- Contribute to The San Diego Foundation's Climate Change Initiative through Friends of The Foundation using the enclosed envelope or online at www.sdfoundation.org.

**Emily Young**

Associate Vice President,
Community Partnership
Call (619) 235-2300 or email
emily@sdfoundation.org.



The San Diego Women's Foundation

"Remember there is no such thing as a small act of kindness. Every act creates a ripple with no logical end." – Scott Adams, Dilbert cartoonist

Measuring impact could be compared to measuring ripples, and the San Diego Women's Foundation has spent a great deal of time doing just that. A previous issue of Foundation Focus featured the process used by the SDWF to hone their grant process into three steps: Discovery, Implementation, and Impact.

Twenty seven organizations were interviewed including grantees from the past six years; their information was then analyzed specifically for demographics, ripples and sustainability, summary reports, and trends. The final result was a wealth of information that included a summary of every grant, statistics about the demographics of the people impacted, a detailed map of the impacted areas, testimonials, and finally, statistical information about the organizations.

"In the first six years, we have greatly impacted 33 organizations, and ultimately thousands of lives throughout the community," said Bethel Nathan, SDWF member.

A collection of stories began to take shape about how lives have been changed through the work of the SDWF. "Some of our grants reached a wide number of people with a lighter touch. San Elijo Lagoon Conservancy has 40,000 visitors each year. Our money made an impact by allowing them to complete the design of the boardwalk with interpretive signage," Bethel says proudly.



The SDWF members from left to right are: Bethel Nathan, Pam Werner, Chris Phillips, Mary-Rose Mueller, Teresa Jacques, and Elaine Kalin

"Some of our other grants have impacted fewer people in a more profound way. Eveoke Dance Theatre greatly changed the lives of 16 kids, by establishing their youth performing group, proudly viewed by over 4,900 people."

There is finally a measurement of what this work is accomplishing. "Sometimes it's that rock thrown into the water. The waves go out farther and father and farther..."

The Impact Team: Bethel Nathan, Chair, Pam Werner, Co-Chair, Teresa Jacques, Elaine Kalin, Barbara Lee, Mary Rose Mueller, Chris Phillips.



Tracy Johnson
Director, The San Diego Women's Foundation
Call (619) 235-2300 or email
tracy@sdfoundation.org.

San Diego Social Venture Partners

San Diego Social Venture Partners' (SDSVP) granting process is quite different than traditional grants supporting nonprofit programs.



SDSVP Member-
Duane Trombly

In addition to investing money, SDSVP invests time, talents and resources. More than 150 SDSVP members provide consistent commitment to innovative leadership, and are quickly becoming a large part of long-term solutions to a variety of social issues affecting the San Diego community.

SDSVP "Resource Teams" are manned with SDSVP members available to provide hands-on assistance in six critical areas: **Strategic Planning, Finance, Board Development, Public Relations, Information Technology and Fund Development.** Over the course of the SDSVP "hands-on" three-year funding collaboration, the social "return on investment" is monitored and measured. Last year, SDSVP members contributed their time, talent and resources generated leveraged outcomes of more than 6 to 1.

Duane Trombly joined SDSVP with years of professional expertise in assessing and maximizing a company's operational effectiveness for Fortune 500 companies, as well as emerging technology firms. Through SDSVP's business-driven philanthropic model, Duane has created and implemented a strategic planning process for non-profit service organizations that moves the organization to a whole new level of planning.

True to his business background and SDSVP's mission, Duane's team is building the capacity and sustainability of these organizations while measuring outcomes.



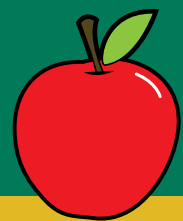
*Sitting Left to Right: Larry Marcus and Robin Stark
Standing Left to Right: Diane Rosenberg, Marjorie Fox, Kevin Gibson, Wendy Gibson*

They are holding up music CDs featuring the talented kids involved with one of our former investees, Human Development Fund. Marjorie Fox (standing) is HDF's Executive Director and on our Board.

Duane and the five other SDSVP Resource Teams are living the SDSVP value of innovative leadership assisting local nonprofits meet and exceed their identified mission and goals.

In 2008, SDSVP will select two "elder issue" causes to which they will apply their unique approach, assisting the organizations to solidify and expand their infrastructure and augment their scope and capabilities.

Please join SDSVP at our First Friday lunch events and learn more about our investees and how we are working together to make a difference in the community. First Friday events are the first Friday of every month from 12:00 - 1:30 pm, held at AMN Healthcare in Carmel Valley. Guests are welcome! **For more information, please contact Peggy Kidd at (760) 269-3835.**



SAN DIEGO Teachers' Fund $2 \times 2 =$

The San Diego Teachers' Fund provides small grants to support the outstanding and dedicated public school teachers throughout San Diego County. The Dream Classroom is an exciting partnership with San Diego's CW5. Each month, the Dream Classroom program will highlight the story of a Teachers' Fund recipient on television. Six of the Dream Classroom segments that you might have seen are:

Lalo Hirsch-San Ysidro High School

"Ballet Folklorico"

A \$1,000 grant to purchase costumes and equipment for the Ballet Folklorico program, which teaches students about the history of Ballet Folklorico and increases their self-confidence through performances.

Pamela King-Oak Park Music Conservatory

"We Are All Achievers!"

A \$1,700 grant to teach students about the achievements of people of color, which fosters understanding and appreciation of the many different cultures that have contributed to American history.

Cathy Kniss - The Learning Choice Academy

"Yearbook Journalism Program"

\$1,000 for the purchase of four cameras and printing equipment for a yearbook class where students learn journalism skills and produce an annual yearbook to record their middle and high school years.

Thomas Duncan-KIPP Adelante Preparatory Academy

"Learning to Read Music for ELL Students"

A \$370 grant to purchase music writing software to help English Language Learner (ELL) students become proficient music readers.

Lisa Rinker-King Chavez Primary Academy

"Crossfit for Kids"

A \$2,000 grant to purchase fitness equipment for elementary school age children, with the aim of raising academic performance and decreasing violent behavior.

Kristin Sebela - Liberty Elementary School

"Hands-On Physical Science"

A \$2,000 grant to purchase science equipment and materials for fifth grade students to help meet standards in physical science through a unit developed around hands on, inquiry-based student learning.

Lindsey Kovelent - Valencia Park Elementary School

"A Garden to Help Us Grow"

A \$2,000 grant to purchase equipment and books for kindergarten and first grade students to learn how to plant and grow their own garden, learn about health and fitness, and care for their community by working with volunteers at a local senior center.



Arzo Mansury

Director, Scholarships & San Diego Teachers' Fund
Call (619) 235-2300 or email arzo@sdfoundation.org.



Oak Park Music Conservatory: Teacher: Pamela King with her "We are all Achievers" lesson



King Chavez Academy: Teacher Lisa Rinker and Class "Crossfit for Kids" lesson



Valencia Park Elementary: Teacher: Lindsey Kovelent: "A Garden to Help Us Grow" lesson

Foundation Focus

New Faces at The Foundation



Pilar Montoya, Vice President, Regional Outreach

Pilar Montoya joins The Foundation as Vice President, Regional Outreach, overseeing the six community foundations throughout the San Diego region. Born in Colombia, Pilar has over 16 years of experience

in communications and marketing, and was the founder and president of Montoya Communications, a full-service marketing firm which serviced local and national clients. Pilar has extensive broadcast experience, and has held producer and special programming director positions for KCRA-TV. Pilar graduated from California State University, Sacramento, with a degree in Journalism and Communications.



Cheryl Alethia Phelps, Director, Civil Society, Analysis & Strategy

Cheryl Alethia Phelps comes to The Foundation with 20 years of experience in public interest, nonprofit and legislative environments. As Director of Civil Society, Cheryl oversees The Foundation's strategic philanthropy for

civic engagement, working to identify major issues affecting the San Diego region and developing initiatives and leadership to achieve meaningful solutions. She also staffs our new Public Policy Task Force. Prior to joining The Foundation, Cheryl had a consulting practice specializing in strategic planning, governance and civic participation. She also worked for the U.S. House of Representatives on the professional staff of the Government Operations Committee. Cheryl graduated from the University of Southern California with a degree in Political Science.



Arzo Mansury, Director, Scholarships & San Diego Teachers' Fund

Arzo Mansury joins The Foundation as the Director of Scholarships and Teachers' Fund. Born in Afghanistan, Arzo oversees the Community Scholarship Program, which provides financial assistance for students

to continue their education. She is also responsible for managing the San Diego Teachers' Fund which provides grants to local teachers. Prior to joining The Foundation, Arzo worked at the Embassy of Afghanistan as the Press Secretary and Women's Affairs Attaché. Arzo earned two B.A. degrees from the University of California San Diego in Political Science and Ethnic Studies. She has also earned executive education certificates from the Harvard Business School and the University of Cambridge in England.

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2508 Historic Decatur Road, Suite 200
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Phone (619) 235-2300
Email info@sdfoundation.org
Website www.sdfoundation.org

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