



Engaging, Educating, Inspiring



Jewish Community Foundation
San Diego

THE JEWISH COMMUNITY FOUNDATION OF SAN DIEGO

THE FOUNDATION ENGAGES, EDUCATES AND INSPIRES generations of givers throughout the San Diego Jewish community. We strive to build a strong culture of trust, respect and service with our donors, community, volunteers and staff.

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THE FOUNDATION'S FIVE STRATEGIC AREAS:

1. EXPAND RELATIONSHIPS WITH CURRENT DONORS
2. ENCOURAGE PHILANTHROPY AMONG YOUNGER GENERATIONS
3. EXPAND PARTNERSHIPS WITH JEWISH ORGANIZATIONS
4. SERVE AS A RESOURCE FOR PHILANTHROPY IN SAN DIEGO
5. BUILD INFRASTRUCTURE TO ENSURE TRUST FOR THE LONG-TERM



WHAT WE OFFER

Promoting Philanthropy for a Vibrant Community

Give Now

Provide current support for one or more charitable purposes or organizations.



Give Later

Leave the world a better place through giving from your will or estate.

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WAYS WE SUPPORT YOUR PHILANTHROPY

Grantmaking Services

- Bi-monthly grant distribution, minimum \$100, no grant limit
- Research on funding opportunities
- Manage grant proposal process
- Nonprofit research
- Planned giving resources

Consulting/Technical Assistance

- Grantmaking for private foundations
- Expertise about nonprofit community
- Collaboration with professional advisors

Financial Management and Administration

- Online access for grantmaking and fund information
- Tax reporting for charitable contributions
- Quarterly fund statements
- Strong oversight of investments

Educational Programs

- Site visits to nonprofit organizations
- Multi-generational conversations about giving
- Strengthening Jewish nonprofits in San Diego
- Trends and issue areas

FIND OUT MORE AT
www.jcfsandiego.org

TYPES OF FUNDS



How do they work?

Donor contributes cash, stock or other assets to fund



Donor may receive immediate tax benefit



Donor consults with Foundation staff on options such as...



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DONOR ADVISED FUND

Donor can then recommend grants anytime to qualified nonprofits in the Jewish or general community – schools, hospitals, the arts, social services, and more in San Diego, the U.S. or Israel

- Allows donor to centralize giving from one source
- Can involve all family members
- May name children and grandchildren as successor advisors

ENDOWMENT FUND

Donor will collaborate with the Foundation to select qualified nonprofits in the Jewish or general community – schools, hospitals, the arts, social services, and more in San Diego, the U.S. or Israel

- Established for charitable organizations or fields of interest
- Fixed percentage of the fund distributed annually
- Established during lifetime or after

STRATEGY >

Expand Relationships
with Current Donors

WAYS TO GET ENGAGED

Learning, Understanding, Growing

THE FOUNDATION ENGAGES ITS DONORS in meaningful and strategic philanthropy.



Our **donor education series** features current trends and prominent speakers.

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The Foundation arranges **site visits** to organizations where donors see first-hand the programs they fund.



Volunteer committee participation provides donors with a deeper understanding about philanthropy and The Foundation's impact.



Including youth in **multi-generational** conversations promotes their commitment to giving.

From Our Donors:

"For us, the Jewish Community Foundation is the full package: a service, an education and a community."

"It doesn't matter what income level or stage of life you are in, the Foundation just makes it so easy to give back."

JEWISH WOMEN'S FOUNDATION

STRATEGY >

Expand Relationships
with Current Donors

Improving the Lives of Jewish Women and Girls



SINCE 2004, the Jewish Women's Foundation has granted and leveraged more than \$700,000 to address critical issues facing Jewish women and girls in San Diego.

JWF is completing a four-year initiative aimed at promoting positive self-esteem, peer relations and leadership skills in teen girls. Over 300 young women receive services from diverse Jewish organizations.



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2011-2014 JWF Grantee Programs

- **B'not Lead On**, Friendship Circle
- **Girls Give Back**, Jewish Family Service
- **Girls Life**, Lawrence Family Jewish Community Center, JACOBS FAMILY CAMPUS
- **JWF Scholars**, Collaboration among Temple Adat Shalom, Chabad of Poway, Ner Tamid Synagogue
- **Rosh Hodesh**, Lawrence Family Jewish Community Center, JACOBS FAMILY CAMPUS

FOR MORE INFORMATION PLEASE VISIT
www.jcfsandiego.org/jwf

STRATEGY >

Expand Relationships
with Current Donors

PLANNING YOUR LEGACY

Ensuring Organizations Thrive for Generations to Come

YOUR LEGACY SECURES THE FUTURE OF OUR COMMUNITY

Your legacy gift of any size, to any organization, can be designed to match your personal circumstances.

WAYS TO LEAVE A LEGACY

- Bequest in will or trust
- Appreciated assets or cash
- Life insurance policy
- IRA or retirement plan
- Charitable remainder trust
- Charitable gift annuity

WAYS TO WORK WITH THE FOUNDATION

- Confidential conversations to create your legacy plan
- Coordination with your professional advisors
- Fully documented plan that can be revised at no cost



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I did not find the world desolate when I entered it. And as my parents planted for me before I was born, so do I plant for those who will come after me.

— TALMUD

FIND OUT MORE AT
www.jcfsandiego.org/legacies



YOUTH PHILANTHROPY

STRATEGY >

Encourage Philanthropy
among Younger
Generations

Engaging Younger Generations



The **Peter Chortek Leadership Award** honors three extraordinary teens' community service and leadership each year. Peter z"l and Elaine Chortek created the award to foster Jewish communal involvement and encourage practicing *tikkun olam*, repairing the world.

The Foundation's **Youth Philanthropy Program** provides philanthropic education through Jewish values, site visits to local nonprofits, and the opportunity to make grants. Teens develop a greater sense of awareness about community needs and the challenges individuals and families face in San Diego. They gain the resources necessary to effectively analyze nonprofits and make informed philanthropic decisions.



FIND OUT MORE AT
www.jcfsandiego.org/youth

STRATEGY >

Expand Partnerships
with Jewish
Organizations

ENDOWMENT LEADERSHIP INSTITUTE (ELI)

Providing Jewish Organizations with Legacy Planning Resources

Create a Jewish Legacy®

ELI BRINGS TOGETHER Jewish organizations, synagogues and day schools with the common goal of establishing endowments for the long-term vitality of the San Diego Jewish community. It has built a community culture of legacy giving in San Diego. To date, nearly 1,000 families have established legacies with hundreds of millions of dollars in planned gifts.

From ELI Organizations:

“Because of ELI, our synagogue now has a good start with an endowment. We have \$2 million at the Jewish Community Foundation and many more planned gifts from our congregants.”

“ELI opened up a whole new world of possibilities. It’s an extraordinary program. A collective power comes from being with other organizations. ELI makes a huge difference in our community.”



Donors may sign the Book of Life upon promising a legacy gift of any size to the Jewish community.



Look for us in the *San Diego Jewish Journal* and other publications.

SEE ALL OF THE BOOK OF LIFE ENTRIES AT
www.jcfsandiego.org/bookoflife

PROFESSIONAL ADVISOR COMMUNITY

STRATEGY >

Serve as a Resource
for Philanthropy in
San Diego

Deepening Relationships with Professional Advisors



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THE FOUNDATION WORKS WITH ADVISORS from the legal, accounting, insurance, financial planning, wealth management and investment fields to help individuals and families reach their charitable goals.

Personalized, Confidential Assistance Shaping Your Client's Philanthropic Mission

- ❖ Research and information for charitable planning

An Emphasis on Multi-Generational Giving

- ❖ Guidance in conducting effective family philanthropy conversations

Gift Illustrations and Projections for You to Use with Clients

- ❖ Calculations for planned gifts
- ❖ Major gift/grant agreements

Continuing Education Programs

- ❖ Quality seminars on philanthropic trends and charitable estate planning

FOR MORE RESOURCES, VISIT
www.jcfsandiego.org/professionals



STRATEGY >

Serve as a Resource
for Philanthropy in
San Diego

COMMUNITY PARTNERSHIPS

Building Partnerships with Philanthropic Organizations



Through membership in the international **Jewish Funders Network**, the Foundation works to maximize the quality and impact of Jewish philanthropy.

www.jfunders.org



Foundation staff serve on the board and committees of **San Diego Grantmakers**, a convener and resource for organized philanthropy. We also lead professional development sessions, engage in funder collaboratives and take an active role in the annual conference.

www.sdgrantmakers.org

The Foundation sponsors the **University of San Diego Nonprofit Governance Symposium**, a gathering of nonprofit and philanthropy board members and professionals pursuing strong governance through board development, ethics and best practices.

www.sandiego.edu



The Foundation supports the leadership development of philanthropy professionals, including membership in the San Diego Chapter of **Emerging Practitioners in Philanthropy** and partnership with the **Association of Fundraising Professionals**.

www.epip.org | www.afpnet.org



RESOURCES AVAILABLE

STRATEGY >

Build Infrastructure to
Ensure Trust for the
Long-Term

Meeting Spaces for Philanthropy Discussions

The Tuttleman Family Philanthropy Room is a state-of-the-art meeting venue. The space offers resources and an ideal environment for donors to engage in confidential discussions about their charitable giving, legacy and estate planning and family philanthropy.



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The Foundation established the Littman Legacy Room, a meeting space in honor of Gail Littman, of blessed memory. In addition to providing an intimate venue for discussing charitable giving, the room houses resources on legacy planning for donors and nonprofits.



STRATEGY >

Build Infrastructure to
Ensure Trust for the
Long-Term

INFRASTRUCTURE AND GOVERNANCE

Fostering Trust and Securing the Future

THE FOUNDATION adheres to the highest standards of governance with a strong commitment to transparency and accountability.

- The **board of directors** is comprised of highly qualified community leaders from diverse fields of expertise. All board members are required to serve on a committee before being considered for a board appointment.
- The Foundation's active **committees** address key areas: Audit, Board Advancement, Real Estate & Gift Acceptance, Endowments and Grants, Endowment Leadership Institute, Executive, Finance and Systems, Human Resources, Investment, Philanthropy, and Professional Advisors.
- AKT, an independent public accounting firm, audits the Foundation's financial statements annually. AKT has consistently rendered an unqualified opinion. The **audited statements** are available on our website.
- The Foundation focuses on **efficiency**, keeping operating expenses low.
- The Investment Committee administers **investment policy** with the guidance of the Foundation's consultant, Slocum. Based in Minneapolis, Slocum provides independent investment advice to over 100 institutions in the U.S. and Canada.
- The Foundation has established policies to reflect **best practices** in the field, addressing confidentiality, ethics, whistleblowing and conflicts of interest.

WAYS TO THINK ABOUT YOUR PHILANTHROPY



Why are you giving?

What do you want to accomplish?

How will you involve others?

What do you wish for future generations?

Your thoughts?



ESTABLISHED IN 1967, the Jewish Community Foundation is the oldest community foundation in San Diego.

Our mission is to promote philanthropy through meaningful partnerships with donors and community organizations in achieving charitable goals; to increase current and future support for a vibrant and secure Jewish and general community in San Diego, Israel and around the world.



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San Diego

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