Jewish Community Foundation
of San Diego
ANNUAL REPORT 2006
mission
To promote philanthropy through meaningful partnerships with donors and community organizations in achieving charitable goals; and
To increase current and future support for a vibrant and secure Jewish and general community in San Diego, Israel and around the world.

values
Tzedakah (justice): ethical responsibilities, sacred work, tikkun olam
Dor l’dor (generation to generation): passing on values, strengthening future generations, the importance of elders and youth
Kavod (respect): listening, responsiveness, acts of loving kindness, being inclusive, integrity, truthfulness
Torah (learning): love of Judaic wisdom and teaching
Derech Eretz (way of the land): Transparency, accountability, excellent governance

vision
As a primary, trusted and expert resource for philanthropy, the Jewish Community Foundation of San Diego will engage, educate and inspire generations of givers throughout the Jewish community.
According to Jewish texts and traditions, the number 40 symbolizes a generation, a cycle, an opportunity for new understanding. Moses ascended Mount Sinai for 40 days and 40 nights. The Israelites wandered the desert toward the Promised Land for 40 years. The number 40 has the power to uplift to a spiritual, sacred state.

This report features reflections from Foundation past presidents and a timeline of important milestones. As the Foundation celebrates its 40th anniversary, it is appropriate that we honor and celebrate the past and the collective vision that has built a vibrant and strong community.

Yet we must also look to the next 40 years, to generations to come. The future is rich with possibility. Each of us has the power to shape it. What an awesome responsibility.

What a wonderful privilege.
In the last year, the Jewish Community Foundation of San Diego continued its 40 year tradition of working with partners to impact and strengthen the community today and in the future.

- Assets reached a new high of $224 million.

- More than $53 million was awarded to programs in both the Jewish and general communities—3,900 grants to 800 organizations.

- Foundation donors rallied to address emergencies contributing almost $3 million to assist those affected by hurricanes, war in Israel, and earthquakes.

- The number of donor advised funds reached 420, including 53 new funds. Two new family foundations were formed.

- The Endowment Leadership Institute and Create a Jewish Legacy programs inspired more than 350 families to step forward—promising an estimated $61 million in legacies to 35 Jewish organizations and 20 secular groups.

- The Jewish Women’s Foundation grew to include 63 members, and its first funded program, Supporting Jewish Single Parents at Jewish Family Service, made significant inroads.

- The Community Youth Foundation engaged 45 junior high, high school and college students. Seven Community Youth Foundation alumni attended the first-ever Jewish Youth Philanthropy Conference in Denver, Colorado.

- The Foundation’s investment pools program reached its third year, reporting excellent results. The one-year return for the Endowment Pool was 10.1%, and the three-year average annual return was 12.4%.

- More than 600 individuals partnered with the Foundation by contributing to a Fund or participating in a program.
letter to the community

Welcome to the Jewish Community Foundation’s special 40th anniversary report. You will read about our most recent year, in the context of the last four decades.

As you review the historical timeline, you may remember some of the events along the way. You may recognize a photo of someone you’ve long respected or even be glad to see your own name listed. If you’re a newcomer or not yet involved with the Foundation, you may even be inspired to get connected.

As you will discover, the Foundation is intensely focused on both a short and long term vision. Of immediate concern is improving the quality of life for community members through meaningful and effective grants.

With a longer view in mind, the Endowment Leadership Institute (ELI) is creating a culture of legacy giving in our community. Through the excellent work of the ELI organizations, hundreds of families are including the Jewish community in their estate plans. Current and future endowments totalling millions of dollars are being established so that the San Diego Jewish community remains strong.

These legacies reflect a deep trust in future generations. To help develop new leaders, younger people are participating in donor advised funds, family foundations and the Community Youth Foundation.

At the core of the Foundation’s work is a genuine sense of gratitude. We are thankful for the generosity of our donors, for the friendship of the community and for the work we do together to strengthen Jewish life.

Sheila Potiker Marjory Kaplan
Chair Chief Executive Officer

1967
Community Foundation of UJF of San Diego
established and approved by the State of California as a public charity
family foundations

Establishing a family foundation at the Jewish Community Foundation engages multiple generations in working together to impact the community in a meaningful way. Since the Foundation takes care of all the administrative details, the family is free to focus on what really matters—strengthening the community. For the future, the founders are assured that the family foundation will continue to be connected with the community and receive assistance, support and staffing from the Jewish Community Foundation.

The following family foundations have been established:

- Chortek Family Foundation
- Foster Family Foundation
- Galinson Family Foundation
- Polis-Schutz Family Foundation
- Slate Family Foundation
- Stone Family Foundation
- Turk Family Foundation
- Viterbi Family Foundation

1968

First eight philanthropic funds created at Community Foundation with 33 organization grantees

Foundation highlight

The Viterbi Family Foundation

“Our family foundation has helped establish a philanthropic bond within our family and allowed us to work together in a positive and satisfying way while benefiting our community, our nation, Israel and the world.” Andrew & Erna Viterbi
**donor advised funds**

Donor Advised Funds are a strategic and simple conduit for giving to favorite organizations. Donors make a tax-deductible contribution when most convenient and then recommend gifts over time to organizations in the Jewish and general communities. A secure online giving system makes the process even easier with simplified record-keeping and all giving information retained in one place.

Fund advisors can access the expertise of the Foundation’s staff and obtain education and advice about community needs and ideas for involving their children and grandchildren.

The following individuals and families have established Donor Advised Funds:

A
- Alternative Families
- Delsee & Jeff Altman
- Lisa & Steve Altman
- Irving & Cecelia Appelbaum
- Arelano Family

B
- Bark Family
- Barsky Family
- Michael Bartell & Melissa Garfield Bartell
- Joan Beber
- Becca
- Herbert L. & Marcella D. Beckett
- Ruth & Irvin Belenzon
- Jeffrey & Kim Bek
- Claude & Rita Benchimol Family
- Ben-Yehuda Family
- Sondra & Robert Berk
- Dennis & Marcia Berman
- Ralph & Roberta Berman
- Dr. Sanford I. Berman
- Edgar Berner Family
- Mitchell & Kelly Berner

C
- Caspi Family
- Chortek Family
- Robert & Kimberly Chortek
- CJM Charitable
- Elaine & Bob Cohen
- Florence Cohen
- Helen & Hal Cohen
- Hilda & Jeremy Cohen Tzedakah
- Howard & Toby Cohen
- Josh & Tracy Cohen
- Cohen-Edelstein
- Joseph Cohen & Martha Farish
- Michelle Cohen Charitable
- Betty & Melvin Cohn Charitable
- Martin & Marilyn Colby
- Rabbi Laurie Coskey & Mark Lohkemper
- Martin & Pearl Cutler

D
- Julie & Paul Datnow Family
- Dimont Family
- DJP
- Debra Dold Charitable

Names featured in color indicate funds established in the last year.

1969
First real estate gift accepted by Community Foundation

1972
Internal Revenue Service recognizes Community Foundation as a public foundation
As one of the early leaders of the Foundation, Victor Schulman applied his business acumen to developing a vibrant community organization. Many firsts were accomplished under his leadership including new relationships with donors, investment policies and a heightened community awareness of the Foundation. While he was in office, the Foundation’s assets reached nearly $500,000.
Helsel Family
Edward & Estelle
Herman Family
Mark & Cindy Hoffman
Carl & Myrna Holmes
Leroy & Claire Hughes
Family

J
Ruth & Paul Jacobowitz
Joan & Irwin Jacobs
Deni & Jeffrey Jacobs
Gary & Jerri-Ann Jacobs
Hal & Debby Jacobs
Family
Paul & Stacy Jacobs
Family
Robert Jaffe
Glenda Sacks Jaffe
Jeremiah
Cecile B. Jordan
Jubelirer Family

K
David & Susan Kabakoff
Family
Jonathan Kabakoff
Sara Kabakoff
Jodie & Robert Kaplan
Marjory Kaplan
Mickey & Jeri Kaplan
Abe & Paula Kassam
Barry & Avra Kassar
Katerman Family
Stephanie Katerman
Schoeder
Richard & Berdele Katz
Family
Katzen Family
Jerome & Miriam Katzin
Kauder Family
Warren & Karen Kessler
Lewis & Marnie Klein
Klitzner Family
Klug

Gerald & Shirley
Kobernick
Kodesh Family
Gary Kornfeld &
Theresa Dupuis
Martin & Phyllis Kornfeld
Richard & Carol Kornfeld
Jay & Lael Kovtun
Kranzler Family
Lenore Krems
Krichman Family
Krosner-Johnson

L
Mark and Elsa Lantzman
Hali Lapidus
Robert & Susan Lapidus
Robert B. Lazarus
Leichtag Family
Norman G. Levi Family
Richard C. & Harriet Levi
Gary & Lisa Levine
Family

Levinson Family
Arthur & Midge Levy
Bernard L. Lewis
James B. Lewis Family
Marshall & Judy Lewis
Theodora F. Lewis
Richard & Claudia
Libenson
Light
Littman Family
Liwerman Family
Lauren & Sol Lizerbram
Family
LM R
Michael & Darryn
Lowenstein
Lubin Family
Luftig Family

M
Ed & Marilyn Magnin
Henry & Elaine Magnin
Michael & Ellen

Names featured in color indicate funds established in the last year.

1974
First Foundation grant guidelines and philanthropic fund procedures drafted
Discussions held with each donor associated with the Foundation about using fund earnings to address pressing community needs.

Magerman
Ruth & A. Harry Malin
Malin Family
Brian & Suzanne Marcus
Margolin Family
Marks Family
Medress Family
Eddie S. Mendelsohn Family
Constance M. Mercer & Ruth E. Danciger
Carlos & Esther Mician Family
James & Estelle Milch
Danielle & Brian Miller
Clive & Tamara Moeh Family
Susan F. Morris
Ann Levenstein Mound

Names featured in color indicate funds established in the last year.

1975

Discussions held with each donor associated with the Foundation about using fund earnings to address pressing community needs.
fund highlight

Laurel Silberman

“As I studied to become a Bat Mitzvah, I learned about the importance of giving and acts of loving kindness. These are very important Jewish values that guide me. I believe that I can make a meaningful difference to better the world.” —laurel silberman

Names featured in color indicate funds established in the last year.

1975

San Diego’s Jewish community assists in services to Vietnamese refugees following Saigon’s fall
“Great is the privilege of the philanthropists for they awaken the good of the community.”
—zohar

Stern
Ryan & Ashley Stone
Matthew & Iris Strauss
Szawienko Family

T
Tauber Family
Gertrude Thaler
Edward & Susan Gail Thomas
Tiano Family
Tubis Family
Tucker-Oken Family
Emma Tuttleman
Jan S. Tuttleman
Sophie Tuttleman

U
Unity Through Sharing

V
Vener Family

Alexander Viterbi
Audrey Viterbi & Dan Smargon
Caryn & Alan Viterbi
Viterbi Family

W
Wangers Family
Charles & Randi Wax
David & Sharon Wax
John & Cathy Weil
Weiner Family
Norman Weinstein
Sandra & Sheldon Weinstein
Ken & Joan Weiss Family
Susan Chortek Weisman & Eric S. Weisman
Stuart & Marcia Weiss
Eric & Joann Weitzen Family
Welt Family

Gordon & Marilyn Williams
Wilson-Strauss Family
Stanley & Dorothy Winter
Wolff Family

Z
Cynthia Zena
Helene & Allan Ziman
Susan Zimmerman Family
Leonard & Lois Zlotoff
Marshall & Bette Zucker
Anonymous (39)

Names featured in color indicate funds established in the last year. If your name was inadvertently left off this list or listed incorrectly, please contact the Foundation.

1976
Louis Lieblich becomes part-time Executive Director of the Foundation
endowments

An endowment fund creates a permanent legacy, perpetuating support for causes and organizations—locally, nationally and internationally. An endowment can be created in the donor’s name or in the name of someone the donor wishes to honor and can be established for the benefit of one or more charitable purposes or organizations.

Jewish Community Endowment:
- Friederike Freund Memorial
- Eva Guttman Memorial
- David Meister Memorial
- Sam & Adeline Pollack Memorial
- Ruth Raskin Memorial
- Mary Schuldendri Memorial
- Lillie Breitbard Lion of Judah Endowment
- Sophie Brody Endowment
- Sophie Brody Lech L’Cha Leadership Endowment
- Sophie Brody Lion of Judah Endowment
- Camp Mountain Chai Scholarship Endowment
- Continuity Endowment
- Stanley E. Foster Construction Tech Academy Endowment
- Stanley & Pauline Foster Young Leadership Award Endowment
- Trude Gitler Lion of Judah Endowment
- Dorothy Goldberg Perpetual Annual Campaign Endowment

Abraham Gray & Elfrieda Meth Endowment for Immigrants
Edward & Estelle Herman Family Endowment
Jewish Day School Endowment for Scholarships:
  - Michael Kessel Scholarship
  - Fred Oken Memorial
  - Jack Oken Memorial
Katzin Family Jewish Family Service Endowment
Rosemary Beth Moss Memorial Endowment
Anne Ratner Family Endowment
Sandford & Laurayne Ratner High School of Jewish Studies Scholarship Fund
Ratner Endowment for Israel Scholarships
Ratner Endowment for Scholarships to the Abraham Ratner Torah School
Ratner Endowment for the San Diego Symphony
Ratner Endowment for Tifereth Israel Scholar-in-Residence
Ratner Women’s Division Endowment for Extraordinary Leadership
Jordan Ressler Endowment
San Diego Jewish Community Endowment for the Elderly:
  - Sonya Seiderman Memorial
Victor Schulman Endowment for the Jewish Elderly
Milton Sorokin Memorial Endowment for Scholarships
Gloria & Rodney Stone Rabbinic Leadership Award Endowment
Caryn Viterbi Endowment for Educator Excellence
Viterbi Family Endowment for Camp Sunshine Family Sponsorships
Mort Vogelson Memorial Endowment for Israel
Mort Vogelson Memorial Endowment for the Elderly
Mort Vogelson Memorial Soille Hebrew Day School Scholarship Endowment
Mort Vogelson Memorial Endowment for the San Diego Jewish Community

1977

Foundation awards grant to provide counseling to Jewish youth who have become involved with religious cults.
grant highlights

During the last year, Jewish Community Foundation grants touched thousands of lives from San Diego to Safed, Johannesburg to Jerusalem, and places in between. More than $53 million was awarded through 3,900 separate grants to 800 organizations.

1977

Foundation sponsors major community event to promote bequests and endowments, attracting more than 100 people
grantee organizations

During 2005/2006, grants from the Jewish Community Foundation were awarded to hundreds of organizations throughout San Diego and the world. This is a partial list. Names featured in color indicate Jewish organizations.

arts

A Reason To Survive
Absolute Ensemble
Alliance of Resident Theatres
Amateur Musicians' Orchestra
America Israel Cultural Foundation
American Sephardi Federation
American Symphony Orchestra League
Ashoka Innovators for the Public Avoda Institute
Balboa Art Conservation Center
Berkeley Repertory Theatre
Berkshire Project
Bernardo Community Concert Association
Bloomington Community Radio
California Literary & Prologue Society
Center for Jewish Culture & Creativity
Center for Study of Popular Culture
Center Theatre Group of Los Angeles
Cincinnati Museum Center for Natural and Cultural History
City Ballet
Civic Youth Orchestra
Class Acts Arts
Classics for Kids
Culture Shock Dance Troup
Cygnet Theatre Company
Denver Center for the Performing Arts
Early Ford V8 Foundation
 Hirshhorn Museum & Sculpture Garden of the Smithsonian Institute
Idyllwild Arts Foundation
Installation Gallery
Japanese Friendship Garden Society
Jewish Heritage Programs
Jewish Museum
KPBS TV & Radio
La Jolla Music Society
La Jolla Playhouse
Lamb's Players Theatre
Library Association of La Jolla—Athenaeum
Los Angeles Philharmonic Association
Lux Art Institute
Lyric Opera San Diego
Mainly Mozart Festival
Malashock Dance & Company
McCallum Theatre Foundation
Metropolitan Museum of Art
MINGEI, International
Museum of Contemporary Art San Diego
Museum of Fine Arts
Museum of Modern Art
Museum of Photographic Arts
Music Associates of Aspen
National Foundation for Jewish Culture
National Yiddish Book Center
New Orleans Center for Creative Arts Institute
Olaf Wieghorst Museum Foundation
Old Globe Theatre
Orange County Performing Arts Center
Orcas Island Chamber Music Festival
Orcas Island Historical Society
Playwrights Project
Poway High School Band Boosters

1978

Foundation provides loan to expand San Diego Hebrew Homes

1978

Six congregations create San Diego Jewish Academy, the first interdenominational day school in San Diego
section two

Roaring Fork Public Radio
San Diego Art Institute
San Diego City Ballet
San Diego Civic Light Opera Association
San Diego Dance Theatre
San Diego Hall of Champions
San Diego Junior Theatre
San Diego Museum of Art
San Diego Natural History Museum
San Diego Opera Association
San Diego Repertory Theatre
San Diego Shakespeare Society
San Diego Symphony
San Diego Watercolor Society
San Diego Youth Symphony
San Francisco Symphony
San Luis Obispo Children’s Museum
SUSHI
Timken Museum of Art
Vermont Youth Orchestra Association
Westchester Symphony Society
White Nights Foundation of America
XLN C 1
Young Audiences of San Diego Youth Philharmonic Orchestra

education

Academy of Urban Learning
Affordable Housing Management Association
Agency for Jewish Education
American Academy of Arts & Sciences
American Associates Ben Gurion University of the Negev
American Committee for the Weizmann Institute
American Friends of Israel College of Technology for Women
American Friends of Kedumim
American Friends of Livnot U’lehabanot
American Friends of Neve Shalom/Wahat al-Salam
American Friends of Tel Aviv University
American Friends of the Hebrew University
American Friends of the Shalom Hartman Institute
American Friends of Yeshiva Aish HaTarah
American Pardes Foundation
American Society for Technion
American Society of Yad Vashem

Aspen Institute
Aquatic Adventures Science Education Foundation
Auschwitz Jewish Center
Babson College
Bar Ilan University of Israel
Bergamo Italy Classical Lyceum
Berkeley Bayit
Bishop’s School
Bnai Brith Youth Organization
Boston Latin School Association
Bowdoin College
Brandeis University
Brandeis-Bardin Institute
C.S. Lewis Foundation
California Western School of Law
Camp Mountain Chai
Camp Ramah in California
Campanile Foundation
Canyon Crest Academy Foundation
Carroll College
Catholic University of America
Center for Leadership and Learning
Cesar Chavez Public Charter High School
Chabad Day School
Children’s Museum of San Diego
Children’s School for Child-Centered Education
City College Fund
Claremont McKenna College
Colgate University

1979
San Diego Jewish children plant 600 trees in Balboa Park as gift from Jewish National Fund
-College Preparatory School
-Columbia University
-Committee for Accuracy in Middle East Reporting in America
-Cornell University
-Dana Association
-Deanna Rose Children’s Farm—Funds of the Farmstead
-Del Mar Schools Education Foundation
-Educational Broadcasting Corp
-Educational Enrichment Systems
-Elementary Institute of Science
-Evanston/Skokie School District 65
-Explorer Elementary
-Facing History and Ourselves National Foundation
-FAME
-Family Literacy Foundation
-Feminist Majority Foundation
-Foundation for Conservative M asorti- Judaism in Israel
-Foundation for Jewish Camping
-Foundation for Mott Community College
-Francis W. Parker School
-Friends of Jerusalem College
-Friends of Read San Diego
-Friends of the Del Mar Library
-Friends of the La Jolla Library
-Friends of the Pacific Beach Library
-Friends of the San Diego Public Library
-Friends of the Scripps Ranch Library
-Friends of Torrey Pines Elementary Schools
-Gillispie School
-Givat Haviva Education Foundation
-Guglielmo M arconi International Fellowship Foundation
-Hand in Hand American Friends of the Center for Jewish-Arab Education
-Harvard College Fund
-Harvard University
-Harvard-Westlake School
-Hebrew Academy of Indianapolis
-Hebrew Union College
-Heritage Foundation
-Heritage House
-Hermosa Beach Education Foundation
-High Tech High Foundation
-Hillel at Stanford
-Hillel Council of Colorado
-Hillel of San Diego
-Hillel: The Foundation for Jewish Campus Life
-Home Instruction for Parents of Preschool Youngsters
-I*EARN
-Indiana University Foundation
-Indiana University Jewish Studies Program
-Inland Empire Scholarship Fund

Names featured in color indicate Jewish organizations

1979
Dan Weinberg, first full-time Foundation Director hired

1980
Foundation sponsors community gala dinner to salute Carl Esenoff, Founding President

"The primary objective of the organizers of the Foundation and of mine during my presidency was to create a vehicle to support the special and emergency future needs of the community.

The secondary objective was to establish donor advised funds to support current needs. The endowment component grew slowly, but donor advised funds increased at a more rapid pace during my term. The seeds of the Foundation’s excellent reputation and values were planted during my tenure and by those who came before me.”

—Herbert Solomon

Herbert Solomon
President

1980-1982
1981
Foundation receives first major gift to Unrestricted Endowment in memory of Morris Siegel
Ripon College
Sage Canyon School
Saint Scholastica Academy
San Diego Aerospace Museum
San Diego Council on Literacy
San Diego High School Foundation
San Diego Historical Society
San Diego Jewish Academy
San Diego Public Library
San Diego Space & Science Foundation
San Diego State University Foundation
San Diego Torah High School
San Diego Unified School District
San Diego Yacht Club Sailing Foundation
Sarabande Books
Schechter Institute of Jewish Studies
Scripps College
Seeds of Peace
Shearim USA Charitable Trust
Sigma Alpha Mu Foundation
Simon Wiesenthal Center
Soille San Diego Hebrew Day School
Solana Beach Foundation for Learning
South Bay Union School District
Southern California Yeshiva High School
Southwestern College Foundation
Stanford Graduate School of Business
Stanford Hillel
Stanford University
Steve S. Kang Young Artists and Scholars Fund
Students In Israel
Sunset View Foundation
Supreme Court Historical Society
Survivors of the Shoah Foundation
Thunderbird the American Graduate School of International Management
Tucson Magnet High School
U.S. Holocaust Memorial Museum
UC Berkeley Foundation
UC Berkeley Hillel
UC Regents
UC Riverside Foundation
UC Santa Barbara Hillel
UC Los Angeles Alumni Association
UC Los Angeles Center for Jewish Studies
UC Los Angeles Foundation
UC Los Angeles Hillel
UC Los Angeles Law School Foundation
UC San Diego Foundation
United Negro College Fund
University of Arizona Foundation
University of Judaism
University of Livingstonia Foundation
University of Maine General Alumni Association
University of Maryland College Park Foundation
University of Michigan
University of New Mexico Foundation
University of North Carolina Charlotte Foundation
University of Pittsburgh
University of San Diego
University of Southern California
University of Vermont and State Agricultural College
University of Vermont Hillel
University School
Urban Institute
USC Hillel Foundation
USC School of Engineering
Vanderbilt University
Walker Elementary School
Wayne State University

Names featured in color indicate Jewish organizations

1981
Foundation holds successful Women & Money seminars
1982
Foundation establishes fund for La Jolla/North City Jewish Community Center
Foundation launches grants program, awarding emergency funds to Jewish Family Service for seniors program.

Names featured in color indicate Jewish organizations:

Angels Foster Family Agency
Arc of San Diego
American Friends Of Libi
American Friends of Selah
American Friends of Alyn Hospital
American Friends of Israel Free Loan Association
American Friends of Israel Guide Dog Center for the Blind
American Friends of Yad Eliezer
American Heart Association
American Institute for Cancer Research
American Jewish Joint Distribution Committee
American Jewish World Service
American Lung Association of San Diego and Imperial Counties
American Ort
American Physicians Fellowship for Medicine in Israel
American Red Cross
American Red Magen David for Israel
American Second Harvest
Amvets Charities
Angel’s Wings
Arthritis Foundation
Assistance League of Greater San Diego
Auntie Helen Fluff ’n Fold Laundry Project
Avalon Municipal Hospital
Baby Blues Connection
Banner Health
Bayside Community Center
Best Friends Foundation

Big Brothers & Sisters of San Diego
Boys and Girls Club of Greater San Diego
Boys Club of Greater Kansas City

Boy Scouts of America Council
Boys Town Jerusalem Foundation of America
Braille Institute of America
Bread for the City
Breathing Room
Brit Tzedek V’ Shalom Jewish Alliance for Justice and Peace
Burnham Institute
C Chat Center
Calcutta Kids
California Council for the Humanities
California Council of the Blind
California P.E.O Home
Camp Sunshine
Canine Companions for Independence
CARE
Casa De Amparo
Catalina Island Women’s Forum
Catholic Charities USA
Catholic Charities/Rachel’s Women’s Center
Cedars-Sinai Medical Center

Stanley Foster’s term as Foundation President was marked by record growth. During his tenure, the Foundation’s assets increased by more than 50% and grants more than doubled. The first grants were awarded from the Jewish Community Endowment to support five important community programs.

“Stanley Foster was a role model for me in the way he accomplished so much with kindness, a gentle manner, and great energy and enthusiasm for so many good works.”

—Edgar Beren, Foundation President, 2004-2006
Center for Science in the Public Interest
Chai-Life Line
Challanged Athletes
Child Abuse Prevention Foundation
Childreach
Children’s Defense Fund
Children’s Dental Health Association of San Diego
Children’s Hospital & Health Center
CHP 1199 Foundation
City Club of San Diego
City of Hope
Coalition to Salute Americas Heroes
Committee Of Concerned Scientists
Community Campership Council
Community Resource Center of Encinitas
Compassion and Choices
Compassionate Friends
Copley Family YM CA
Covenant House of California
Cure Duchenne
Cystic Fibrosis Foundation
Day for Change
Disabled American Veterans
Doctors Without Borders USA
Down Syndrome Foundation of Orange County
Drug Policy Alliance
E.L.E.M. Youth in Distress

Elay Chayim
Elderhelp of San Diego
Elizabeth Glaser Pediatric AIDS Foundation
Elizabeth Hospice
Emilio Nares Foundation
Essex Meals on Wheels
Family House
Five Acres—The Boys & Girls Aid Society of Los Angeles County
Follow Your Dream
Foothill Vocational Opportunities Foundation
Fighting Blindness Foundation for Hearing Research
Fresh Start Surgical Gifts
Friends of Israel Disabled War Veterans
Friends of Orr Shalom Children Villages
Friends of Scott Foundation
Friends of the Israel Defense Force
Friends of the Los Angeles Free Clinic
Friends of the Poor
Friends of Vista Hill Foundation
Friends of Yad Sarah
General Israel Orphan Home for Girls Jerusalem

Gesher
Gift of the Heart
Global Fund for Women
Goodwill Industries of Southern California
Grossmont Hospital Foundation
Guardians of the Jewish Home for the Aged
Guide Dogs for the Blind
Guiding Eyes for the Blind
Habitat for Humanity International
Hadassah—Morton Grove
Hadassah—San Diego Main
Hadassah Medical Relief Association
Harmonium
Hebrew Immigrant Aid Society
Heifer Project International
Heritage Pointe
Hoffman Quadrinity Foundation
Home of Guiding Hands Foundation
Home Start
Hope for A Cure Foundation
Hope Worldwide
Horizons for Homeless Children
Hospice of the North Coast

Names featured in color indicate Jewish organizations

1983 Foundation celebrates record year with assets reaching $8 million
Hospital De La Familia Foundation
Housing Works
Human Relief Organization
Huntington’s Disease Society of America
Info Line of San Diego County
Institute for Myeloma and Bone Cancer Research
Institute for the Advancement of Education in Jaffa
Interfaith Community Services
Interfaith Shelter Network
International Campaign for Tibet
International Development Exchange
International God-Parenthood to Herceg Bosnian Children Associati
International Relief Teams
International Rescue Committee
Interns For Peace
Israel Air Force Center Foundation
Israel Children’s Cancer Foundation
Israel Children’s Centers
Israel Emergency Alliance
Israel Heart Fund

Jane Lanes Kids
Jerusalem Fellowships
Jewish Braille Institute of America
Jewish Centers Association of Los Angeles
Jewish Community Center of San Francisco
Jewish Family and Children’s Services
Jewish Family Service of San Diego
Jewish National Fund
Jewish War Veterans of the USA
Jewish Women International
John Wayne Cancer Institute
Just One Life
Juvenile Diabetes Research Foundation
Ken Jewish Community
Keren Or
Kids Included Together-San Diego
Kline Galland Center
La Casa Center for Autism
La Cuna
La Jolla Rotary Foundation
La Jolla Town Council Foundation
Lance Armstrong Foundation
Lawrence Family Jewish Community Center
Leg-U p Ranch
Lekovod Shabbos
Leukemia and Lymphoma Society
Lifetime Assistance Incorporated

Lightbridge Hospice Community Foundation
Los Angeles Conservation Corps
Los Angeles Group for Blind of Israel
Los Angeles Free Clinic
Lynne Cohen Foundation for Ovarian Cancer Research
Make A Wish Foundation

Mama’s Kitchen
Mastocytosis Society
Mayo Foundation
Mazon—A Jewish Response to Hunger
M D Anderson Cancer Center
Meals on Wheels
Medical Development for Israel
Meir Panim
Memorial Sloan-Kettering Cancer Center
Metropolitan Alliance for Common Good
Michael J. Fox Foundation for Parkinsons Research
Michael Rolfe Research Foundation
Miracle League of San Diego
Mission Valley YMCA

Names featured in color indicate Jewish organizations

1984
Foundation moves to UJF Jessie W. Polinsky Building in Kearny Mesa
Muscular Dystrophy Association
Myasthenia Gravis Foundation of California
National Alliance for Mentally Ill
National Brain Tumor Foundation
National Fragile X Foundation
National Foundation for Cancer Research
National Gaucher Foundation
National Health Council
National Institute for Jewish Hospice
National Kidney Foundation of Southern California
National Multiple Sclerosis Society
National Osteoporosis Foundation
National Transplant Assistance Fund
Neighborhood House
Neurosciences Research Foundation
New Path
North American Conference on Ethiopian Jewry
One Acre Fund
One on One Outreach
Operation Respect
Oprah's Angel Network
Oxfam America
Ozer Dalim
Pacific Council on International Policy
Pan Massachusetts Challenge Trust
Pancreatic Cancer Action Network

Robison Jewish Home
Ronald McDonald House
Rotary Foundation
Rsvp Traffic Foundation
Salk Institute for Biological Studies
Salvation Army
San Diego Center for Children Foundation

San Diego Center for the Blind
San Diego Fire Fighters Community Responsibility Fund Local 145
San Diego Habitat for Humanity
San Diego Hospice and Palliative Care
San Diego Professionals Against Cancer
San Diego Rescue Mission
San Diego Youth and Community Services
San Francisco AIDS Foundation
San Francisco Food Bank
San Francisco Women Against Rape
Scleroderma Research Foundation
Scripps Clinic
Scripps Health Foundation

1984
Foundation purchases $100,000 State of Israel bonds

Names featured in color indicate Jewish organizations
**UNICEF**  
United Charity Institution of Jerusalem  
United in Harmony  
United States Committee Sports for Israel  
United Way/Chad of San Diego County  
USO  
Valley of the Sun Jewish Community Center

**Names featured in color indicate Jewish organizations**

During my term as President, we had extensive discussions on how best to grow the Foundation and attract more potential donors. The two most noteworthy accomplishments included first, the modification of the investment strategy to incorporate investments in equities instead of solely in bank certificates or U.S. Treasuries which has dramatically increased earnings on the Foundation’s managed assets.

Second, a focus on increasing Donor Advised Funds as a means of encouraging charitable giving rather than solely growing the Foundation’s Unrestricted Endowment. All of the funds raised by the Foundation have one common characteristic; namely, all the funds must be used solely for charitable purposes.

—Nessim Tiano

---

**1985**

Foundation awards largest grants in its history to JCC and San Diego Hebrew Homes

**1986**

Congressional Joint Committee on Taxation Chief is featured speaker at Foundation seminar
Young Women's Christian Association
YWCA—Becky's House

human relations
America-Israel Friendship League
American Civil Liberties Union Foundation
American Civil Liberties Union Foundation of Colorado
American Constitution Society for Law and Policy
American Friends Service Committee
American Jewish Committee
American Jewish Congress
Americans for Peace Now
American-Scandinavian Foundation
Amnesty International USA
Anti-Defamation League
Bell Policy Center
Brady Center to Prevent Gun Violence

Brighton Center
Center for American Progress
Council on Foreign Relations
Human Rights Campaign Foundation

Human Rights Watch
Interfaith Community
International Fellowship of Christians and Jews
Jewish Fund for Justice
Moving Traditions
National Conflict Resolution Corporation
ProgressNow.org
Search for Common Ground
Southern Poverty Law Center
State of Change
Third Wave
World Jewish Congress

synagogues in san diego
Chabad of Del Mar
Chabad of La Costa
Chabad of La Jolla Shores
Chabad of Poway
Chabad of San Diego
Chabad of University City
Congregation Adat Yeshurun
Congregation Beth Am
Congregation Beth El
Congregation Beth Israel
Congregation Beth Jacob
Congregation Dor Hadash
Congregation Emanu-El
Congregation Ner Tamid
Congregation Shir Ami
Humanistic Jewish Congregation
Kehillat Ahavat Yisrael

Ner Tamid Synagogue
Ohr Shalom Synagogue
Temple Adat Shalom
Temple Beth Shalom
Temple Emanu-El
Temple Solel of North San Diego
Tifereth Israel Synagogue

synagogues outside of san diego
Association of Reform Zionists of America, New York, NY
Beth Hillel Temple, Kenosha, WI
Beth Israel Sinai Congregation, Racine, WI
Beth Tikva, Santa Fe, NM
Chabad of California, Los Angeles, CA
Chabad of Foothills, Tustin, CA
Chabad of Green Valley, Henderson, NV
Chabad of the Inland Empire, Rancho Cucamonga, CA
Chabad-Lubavitch of Oregon, Portland, OR
Chabad Lubavitch of Monterey, Pacific Grove, OR
Congregation Ahavath Shalom, Fort Worth, TX

1987
Foundation awards funding to SDSU Lipinsky Institute for Judaic Studies for visiting Israeli professor and issues community challenge grant for remainder of funds
Jewish Community Foundation of San Diego

Names featured in color indicate Jewish organizations

Temple Beth Elohim, Wellesley, MA
Temple Chai, Phoenix, AZ
Temple Emanuel, Beverly Hills, CA
Temple Shaaray Tefila, New York, NY

Temple Beth Elohim, Wellesley, MA
Temple Chai, Phoenix, AZ
Temple Emanuel, Beverly Hills, CA
Temple Shaaray Tefila, New York, NY

“An article in the Heritage by Gert Thaler, our esteemed community herald, announcing my election as President in 1988 referred to the Foundation as ‘San Diego’s best kept secret.’ We set about expanding the overall community awareness through articles in the press and presentations at many community meetings. During this period, the economy grew stronger and more individuals became interested in financial planning and learning how the Foundation could fit into those plans. We also reviewed and refined the Foundation’s investment policies focusing on total return, thereby setting the standards for future investment decisions.”

—Jerome Katz

1988
Foundation awards grant to San Diego Hebrew Day School to assist in relocation to new site
last year’s grants

Countries impacted: 70
Cities impacted: 300
Organizations strengthened: 800
Grants awarded: 3,900
Dollars distributed: 53.5 million

changing and saving
five years’ grants

- Countries impacted: 70
- Cities impacted: 360
- Organizations strengthened: 2,700
- Grants awarded: 17,300
- Dollars distributed: 230 million
- Millions of lives
community grants

The Foundation’s Community Grants Program develops innovative ideas by providing seed funding and supporting continuing programs of excellence. Grants are awarded to programs serving Jews in San Diego, Israel and around the world. The program works in partnership with the UJF Allocations process to evaluate community needs and award funds.

in san diego

Agency for Jewish Education
  Congregational School
  Affordability Initiative
  Marketing for Melton Adult Mini School

Hillel of San Diego
  Program Directors

Jewish Family Service
  Rides and Smiles Expansion
  Refugee Resettlement

Lawrence Family Jewish Community Center–Jacobs Family Campus
  Shalom Baby
  Shalom Gesher
  J-Pride

Seacrest Village Retirement Communities
  Resident Assistance Fund

United Jewish Federation
  Jewish Senior Services Council

in israel

Crossroads
  Crisis Intervention Center

Jaffa Institute
  Empowerment of Young Ethiopian Jews

Neve Yosef Community Center
  First Aid Intervention

1989
San Diego resettles more than 350 Soviet Jews with significant funding provided by Foundation

“During my tenure, we established several endowment funds that continue to this day to make a positive difference in San Diego and in Israel. We also built the permanent Unrestricted Endowment, indicating great trust in future leaders and enabling the Foundation’s grants program to grow and thrive.”

—Rodney Stone

1990-1993

Rodney Stone
President

Annual Report 2006
## Community Partners

Sharing resources and developing partnerships are key to a strong and vibrant community. The organizations listed on this page have placed funds with the Foundation to benefit from centralized investment, accounting and administration services. While all have different missions, they share a common desire to ensure the high quality and stability of the community—for now and for future generations.

### Jewish Community Organizations
- Agency for Jewish Education
- Camp Mountain Chai
- Chabad Hebrew Academy
- Hillel of San Diego
- Jewish Family Service
- Lawrence Family Jewish Community Center
- Jacobs Family Campus
- San Diego Jewish Academy
- Seacrest Village Retirement Communities
- Soille San Diego Hebrew Day School
- United Jewish Federation of San Diego County

### General Community Organizations
- Alzheimer's Association
- Elder Law and Advocacy
- La Jolla Playhouse
- San Diego Opera Association
- San Diego Second Chance Program
- San Diego Symphony Foundation
- San Marcos Community Foundation

### Community Funds
- Steve & Shelly Abramson Shabbatonim
- Argen Interest Free Loan
- Bikur Holim
- Chai South Africa
- Emergency Response Foundation
- Eye Physicians Vision
- Stanley Foster Construction
- Tech Academy
- Friends of Herzlia
- Friends of Katrina—San Diego
- House of Israel
- Immigration Museum of New Americans
- Israel Athletic
- Jewish Community Camp & Retreat Center
- Jewish Learning Center
- John A. McCarron International Fund for Continuing Education in Medicine
- Kadima Independent Day School
- Pardes Fellowship
- Project HIGH (Helping Israelis Gather Hope)
- Louis Rose Historical Preservation
- Rae & Ed Samiljan Community Camp Scholarship
- San Diego Jewish Hospice Program
- San Diego State University Jewish Studies Program
- San Diego Walk for Darfur
- Wexner Heritage

<table>
<thead>
<tr>
<th>1990</th>
<th>1991</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation publishes Generation to Generation Charitable Gift Guide</td>
<td>Grants awarded by Foundation support Israel scholarships and needs analysis for seniors</td>
</tr>
</tbody>
</table>
**community youth foundation**

From all over the county and from every denomination, Community Youth Foundation (CYF) participants unite to award grants to worthy nonprofits. Together they study Judaic texts about giving and conduct site visits to community organizations.

In April 2006, seven CYF alumni joined more than 100 other teenagers from across the country in Denver, Colorado for the first-ever Jewish Youth Philanthropy Conference, held in conjunction with the Jewish Funders Network international meeting.

**cyf participants**

- Gabriel Avraham
- Blake Brodie
- Max Einhorn
- Ian Gardiner
- Max Gonzales
- Zachary Herb
- Penny Jennnewein
- Maddy Jennnewein
- Matthew Johnson
- Ariella Laiken
- Daniel Lapidus
- Jessica Moskowitz
- Ilana Newman
- Max Newman
- David Pearl
- Mike Potiker
- Raphael Pransky
- Abbey Seltzer
- M arissa Signer
- Emma Tuttleman
- Alexander Wais
- Zev Warhoft
- Aviva Wolman

**cyf hillel participants**

- Rose Anzarouth
- Jody Coughlin
- Ruth Kerman
- Liz Palmer
- Tamar Rosner
- Carolyn Sam
- Liora Schneider
- Oren Tevet
- Vitaly Dashevsky

“I really loved learning how charities work and how to give money smartly.”

*cyf participant*

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**1992**

Foundation donors recommend more than $20,000 in grants to assist hurricane-damaged South Florida
Foundation Board adopts seven-year strategic plan with a goal of doubling the assets from $15 million to $30 million by the year 2000.

“The one of my primary goals was to strengthen the way the Foundation was being marketed in order to encourage new participants and fulfill the Foundation’s potential for good in the community. We hired a new Executive Director, Marjory Kaplan, and reorganized the staff. With the new emphasis on marketing and growth, assets grew significantly during a moderate market cycle. We also received three major bequests resulting in new programs in San Diego and Israel.”

— Shearn Platt

Shearn Platt
President
jewish women’s foundation

Members of the Jewish Women’s Foundation (JWF) join together to creatively address the needs of Jewish women and girls in San Diego and elsewhere on the premise that the whole is greater than the sum of the parts. The JWF is member-driven, empowering women to engage in collective action through philanthropy and education.

Not only do JWF members contribute funds to worthy programs, but they are encouraged to share expertise and guidance as well, creating a true partnership with funded organizations. The JWF’s first grant established the Supporting Jewish Single Parents Program at Jewish Family Service which connects single parents to the community and provides them with information and resources.

Last year, the JWF sponsored two highly successful Women & Money events, attended by more than 120 people, fulfilling its role as an educational resource for members in the community.

1993

Foundation receives estate of Theresa Woodard for the benefit of children with physical and developmental disabilities. Grants from the estate later establish the Inclusion program at the Lawrence Family Jewish Community Center.

“Sh’mah b’kolah: listen to her voice.”
—Genesis

Jewish Women’s Foundation Chair Marcia Hazan with mother and JWF member Pauline Foster, former President of the Jewish Community Foundation
“Collaborating on grant making with some of the most intellectually engaged women I have ever known has been a very rewarding experience.”

—Marcia Hazan, JWF Chair

founding members

Jan Tuttleman, Founding Chair
Marcia Hazan, Chair
Betty Byrnes, Past Chair
Sondra Berk
Marsha Berkson
Rabbi Lenore Bohm
Lisa Braun-Glazer
Gail Braverman
Sophie Brody*
Julie Bronstein
Elaine Chortek
Hannah Cohen
Phyllis Cohn
Jessica Effress
Emily Einhorn
Toby Eisenberg

Claire Ellman
Phyllis Epstein
Jane Fantel
Judy Feldman
Esther Fischer
Judy Fisher
Pauline Foster
Elaine Galinson
Laura Galinson
Marsi Gardiner
Beverly Glickman
Rabbi Lisa Goldstein
Bryna Haber
Beth Jacobs
Jerri-Ann Jacobs
Mara Jacobs
Sara Jacobs

Susan Kabakoff
Marjory Kaplan
Susan Lapidus
Jennifer Levitt
Barbara Lubin
Ellen Marks
Rebecca Newman
Orit Ostrowiak
Barbara Mandel Pache
Monica Handler Penner
Linda Platt
Julie Potiker
Sheila Potiker
Allison Price
Evelyn Rady
Anne Ratner
Laurayne Ratner

Vivien Ressler
Jane Scher
Barbara Sherman
Karen Foster Silberman
Sharon Silverstein
Elene Solomon
Gloria Stone
Anita Szawielenko
Edna Tuttleman
Sophie Tuttleman
Zelda Waxenberg
Susan Chortek Weisman
Helene Ziman

*Of blessed memory

1994

Marjory Kaplan succeeds Dan Weinberg as Foundation’s second full-time Executive Director
section three
for legacies
create a jewish legacy

A promise today means an enduring gift that will give strength and vitality to the Jewish community tomorrow and improve the quality of life for the community at large. By creating a Jewish legacy, individuals promise to make a gift after their lifetime that will link generations and ensure the security of the organization(s) of their choosing.

Since the inception of the Create a Jewish Legacy Program, 350 families have promised to impact the community by promising an estimated $61 million to 35 different Jewish causes and 20 secular groups. Their commitments to the future are living examples of compassion and generosity.

legacy givers

A
Larry & Janet Acheatel
David & Yael Alpert
Gertrude Aminoff*
Irving* & Cecelia Appelbaum
Daniel Arovas & Joyce Miller Arovas
Joyce Axelrod

B
Dr. Stephen & Carol Davidson Baird
Michael & Lori Barnett
Melissa Garfield Bartell & Michael Bartell
Richard Barton & Elaine Feuer-Barton
Leslie Belden
Irvin & Ruth Belenzon
Jacob & Leslie Bercovitz
Mark Berger & Jackie Tolley
Howard & Marsha Berkson
Michael and Carolyn Berlin
Edgar & Julie Berner
Robert & Linda Bernstein
Sheldon Bernstein
Sidney & Gloria* Bernsen
Samuel Berson*
Raquel Berson
Ezra & Lisa Betech

Terri Bignell
Scott & Karen Blumen
Cynthia Bolker
Brian & Jan Borkum
Richard & Lillian Braun
Ira & Sharon Braverman
Shirley Brenner
Michael Breslauer & Stephanie Levine Breslauer
Jamie & Karen Breziner
Mitchell & Merle Brodie
Nina Brodsky
Sophie Brody*
Abraham & Pamela Broudy
Charlotte Broussard

1993
Special grants awarded to Jewish Family Service to enable relocation to new headquarters in Hillcrest
Year-end contributions to Foundation reach highest point ever

1994
1995
Foundation and Lawrence Family JCC pioneer partnership for endowment services
Three women establish endowments for United Jewish Federation, kick-starting Lion of Judah Endowment program

"As our parents planted for us before we were born, so do we plant for those who come after us."
—Talmud

1995

Ronald & Anne Simon
Neal Singer
Jerold & Phyllis Siperstein
Arnie* & Lucille Sirk
Robert & Debra Skomer
Herbert & Elene Solomon
Steven & Esther Solomon
Leo & Jodie Spiegel
Sperling Family Fund
Steiman Family Trust
Marty Stern & Marcia Kern
Joseph & Ellen Strum*
Michael & Anita Szawielenko
Charles Tannen*
Robert & Mary Stuart Taylor
Nessim & Sarah Tiano
Steven & Sharon Tradonsky
Louis & Tammy Vener
Alan & Caryn Viterbi
Alexandra Viterbi
Andrew & Erna Viterbi

R
Barry Raskin & Linda Olafson
Ruth Raskin*
Abraham* & Anne Ratner
Sandford & Laurayne Ratner
Gary Ravet
Shirley Ravet
Jeffrey & Vivien Ressler
Len & Connie Robin
Bernice Rosenberg
Rabbi Leonard & Judy Rosenthal
Robin Rubin
Craig & Ronnie Rubinoff
Alan & Dana Rusonik
S
Tom & Helen Sabo
Dr. Bruce & Sheri Sachs
AI & Teresita Salganick
Todd Salovey & Diane Boomer
Howard & Diane Schachat
Steven & Linda Schechner
Frederick & Shari Schenk
George & Mary Ann Scher
Colin & Jane Scher
Irving & Gloria Schiffman
Norman & Anneliesse* Schulman
May Sebel
Myron & Cynthia Seeberg
Sonya Seideman*
Charlene Seidle
Walter Shapiro
Leah Shapov*
Jacob & Liz Sharp
Herbert & Bette Shatoff
Mark & Diane Shatz
Lawrence & Barbara Sherman
Mark & Renee Sherman
Sperling Family Fund
Shillman Foundation
Leon & Fern Siegel
Jeffrey Silberman & Karen Foster Silberman
Raphael & Kitty Silverman
Edward & Zella Silverstein
Elaine Simon

As our parents planted for us before we were born, so do we plant for those who come after us.”
—Talmud
Audrey Viterbi
Danielle Viterbi
Samantha Viterbi
Valeri Viterbi
Morton Vogelson*
Steve & Gerry Voit

W
Jeffrey & Barbara Wassertrom
David & Sharon Wax
Zelda Waxenberg
Annette Kaplan Weil
John & Cathy Weil
Rabbi Simcha & Betty Weiser
Dr. Robert Weisgrau &
Dr. Roberta Gottlieb
Eric Weisman &
Susan Chortek Weisman
George Weiss
Nancy Weissberg
Steven & Avra Weitzen
Matthew Weitzman &
Sharon Stamper
Sydney & Cynthia Wexler

Gordon & Marilyn Williams
Mort Winski*
George Wise
Edith Wiseman
Stephen & Deborah Wismar
David Witkowski &
Cantor Kathy Robbins
Hubert & Geraldine Wolff
Dr. Don & Marcia Wolochow
Bertie & Jackie Woolf

Y
Ann Youngblood*

Z
Marvin & Judy Zaguli
Joan Zak
Lillian Zilbercwicz*
Brian & Celena Zimmerman
Jeanne Zlotnick
Anonymous (36)

*Of blessed memory

1995
Estate of Walter Mendelsohn establishes
Early Childhood Diagnostic and Treatment Center in Hof Ashkelon, Israel

“During my term as President, the assets of the Foundation more than doubled from $25 million to $54 million, and we began to whisper about achieving a goal of $100 million of assets. We also reinstituted regular annual grants from our Unrestricted Endowment, and the stage was set for our current role of helping donors design individual charitable plans. I am especially proud that during my term, we successfully implemented our family foundation program which further dramatically increased the size and stature of the Foundation in our community.”

—Lawrence Sherman

If your name was inadvertently left off this list or listed incorrectly, please contact the Foundation.
**endowment leadership institute (ELI)**

The Endowment Leadership Institute (ELI) engages lay and professional leadership from 20 local agencies, synagogues and day schools in a comprehensive training program to establish bequests and other estate gifts. These bequests will build future endowments for the Jewish community.

The key element of the program is maximizing the positive relationships organizations already have with their donors. The Foundation provides each participating organization with a focused course of study including group sessions and individual coaching as well as a $36,000 incentive grant, payable over three years upon the completion of established goals. In addition, the *Create a Jewish Legacy* marketing effort raises awareness of bequests, endowments, and other planned gifts in the overall Jewish community.

Legacies created through ELI will form the endowments that will keep our community strong for generations to come.

**eli participating organizations**

Agency for Jewish Education  
Chabad of University City  
Congregation Adat Yeshurun  
Congregation Beth Am  
Congregation Beth El  
Congregation Beth Israel  
Congregation Beth Jacob  
Congregation Dor Hadash  
Hillel of San Diego  
Jewish Family Service  
Lawrence Family Jewish Community Center  
Jacobs Family Campus

**1996**

Grants awarded by Foundation reach $6 million for fiscal year—highest year ever
Jewish Community Foundation of San Diego

for legacies

1996

Foundation assets reach $24 million

Community leaders gather at Endowment Leadership Institute session

Ner Tamid Synagogue
Ohr Shalom Synagogue
San Diego Jewish Academy
Soille San Diego Hebrew Day School
Temple Adat Shalom
Temple Emanu-El
Temple Solel
Tifereth Israel Synagogue
United Jewish Federation of San Diego County
book of life

The Book of Life documents promises made by one generation to the next to secure the future of the Jewish community. More than 120 people have inscribed their names in the Book of Life, expressing their belief in and commitment to Jewish values and heritage, and ensuring that our people will survive and flourish. The inscriptions, together with a portrait photograph, detail the personal thoughts, passions and experiences that inspired the gift of a Jewish legacy.

“Endowing my Lion gift to the United Jewish Federation Women’s Division will ensure that my tikkun olam continues and will serve as a role model for future generations.”

—Susan Chortek Weisman
excerpt from book of life statement

Steve & Shelly Abramson
Irving* & Cecelia Appelbaum
Joyce Axelrod
Jacob & Leslie Bercovitz
Edgar & Julie Berner
Terri Bignell
Don & Betty Byrnes
Peter & Elaine Chortek
Melvin & Betty Cohn

David & Claire Ellman
Lynne Elson
Earl Feldman
Morey & Jeanne Feldman
Walter & Pam Ferris
Merle & Teresa Fischlowitz
Pauline Foster
Murray & Elaine Galinson
Jay & Lisa Gelbart
Madeline Goldberg

Herman & Jean Gordon
Barbara, Graham & Amanda H.aworth
Marcia Hazan
Deborah G. Horwitz
Edward & Linda Janon
Marcy Kaplan
Robert & Jodie Kaplan
Barry & Avra Kassar
Seth Krosner

Murray & Flora Kuritsky
Marshall, Gail & Rebecca Littman
Hamilton & Estelle Loeb
Norman & Sivia Mann
Howard & Lottie Marcus
Elias & Frances Margolin
Ellen Marks
Jonathan Marks

1997
Foundation celebrates 30th anniversary with assets of $30 million
“The gift of giving fulfills my obligation as a Jewish woman to a city and a community of people that has brought many honors and happiness to my life. It has endowed me with the privilege of performing tzedakah in the names of my parents, George and Anna Shelley and my late husband, Morton Thaler and myself.”

—Gertrude Thaler
excerpt from book of life statement
foundation legacies

The following individuals have demonstrated their trust by allowing the Foundation to provide long-term, perpetual stewardship of their charitable wishes. After their lifetimes, an area of interest endowment fund will be established in their names. Federation funds support the United Jewish Federation of San Diego County’s Annual Campaign.

foundation

Irving & Cecelia Appelbaum
Jessie Bello*
Edgar & Julie Berner
Sheldon Bernstein
Donald & Betty Byrnes
Melvin & Betty Cohn
Daniel & Emily Einhorn
David & Claire Ellman
Beth Faber-Jacobs
Morey & Jeanne Feldman
Murray & Elaine Galinson
Joseph & Beverly Glickman
Marcy Goldstone
Herman & Jean Gordon
Clara Hockmeyer
Robert & Jodie Kaplan
Marjory Kaplan
Jerald & Marge Katicleman
Seth Krosner
Robert Lazarus
Ellen Marks
Alan & Nancy Nevin
Mickey Novak
Joseph & Sima Oppenheimer
Hughes* & Sheila Potiker
Anne Ratner
Jack & Sherron Schuster
Charlene Seidle
Arnie* & Lucille Sirk
Nessim & Sarah Tiano
Sidney & Cynthia Wexler
Anonymous (6)

federation

Names featured in color indicate a Lion of Judah Endowment

David & Annette Alpert
Edgar & Julie Berner
Terri Bignell
Lillie Breitbard*
Sophie Brody*
Hattie “Sunshine” Brooks*
Lucille* & Howard Brotman
Peter & Elaine Chortek
Jane Fantel
Alberta Feurzeig

1997
First family supporting foundations established by Viterbi and Galinson families
The Foundation’s reputation for quality and excellent service expanded during my presidency as did assets and grants. In addition, I started to raise the Board’s awareness of the need to actively request funds for the Foundation’s endowment which was low for a community of our size. My entire team—the Board, Committees and staff—expended much positive and constructive effort to take the Foundation to new heights. It was a real life example of what can happen when a dedicated group of people work together for the good of the community.”

—Pauline Foster

1998

Foundation awards grants to assist in expansion of Seacrest Village Encinitas campus and the Lawrence Family Jewish Community Center

1998

Community Youth Foundation established to educate young people about the impact of philanthropy
memorial fund highlight

Ruth Raskin

“Our Mom’s giving looked beyond the usual places and programs to provide people a chance to think beyond the needs of subsistence and reach for beauty. She also helped people stand on their own and gave them something to build on, a boost to nurture special talent, for example, or furnishings for emigrating Russian Jews setting up their first home in America.”

- Andrea Booth & Betsy Gullickson

memorial funds

Judaic texts and scholars teach that tzedakah is a powerful way to honor the memory of those no longer with us. The same care and concern that these individuals exhibited in life will live on. They will never be forgotten.

- Morley Barsky Memorial
- Marla Bennett Memorial
- Lillian, Jacob and Hyman Goldstein Memorial
- Frances Gotkowitz Memorial
- Carlos Lindenfeld Memorial
- Leo Melman Memorial Camp Scholarship
- Mickey Newman Memorial
- Rabbi Dr. Nathaniel Pollack Memorial
- Ruth Raskin Memorial
- Stephanie Jean Hayo Robins Memorial
- Sidney Rose Memorial
- Jorge Rosental Memorial
- Dorothy and Saul Roth Memorial
- Gregg Paul Silverman Memorial
- Scott Noah Stone Memorial
- Achille and Maria Viterbi Memorial

“May their names forever be a blessing.”

- Talmud

1999

Foundation creates Jewish Day School Fund for Scholarships to benefit all San Diego Jewish Day schools
section four
for stability
financial overview

The Foundation experienced continued financial success in fiscal year 2006 with assets, grants, contributions and investment revenue all increasing from the prior year. The Foundation ranks as the second-largest in San Diego in terms of asset size and is the largest grantmaker in the region. In addition, the Foundation is one of the ten largest organizations of its kind in North America.

assets

Total managed assets climbed to $224 million. This growth occurred within a record year of grant making. Significant contributions and positive investment performance contributed to the overall increase in assets.

grants

Grants increased to $53.5 million and the number of grants reached 3,900, the highest the Foundation has ever distributed.

new gifts

Contributions to the Foundation jumped 65% over the previous year with more than $47 million gifted. Contributions were received from hundreds of individuals and families. Additions to custodial funds increased as well, indicating strong confidence on the part of the Foundation’s nonprofit organization partners.

operating budget

Low overhead and an efficient operation are crucial to the Foundation’s mission of serving the community. The measurement for a community foundation’s efficiency is operating expenses as a percentage of managed assets. For both the last year and the one before that, the Foundation’s ratio was 0.6%, considered low for a community foundation of our size.

Revenues were higher than anticipated and expenses lower than projected. The Foundation has reported a budget surplus every year for more than a decade.

Reserves increased to more than $650,000, providing a prudent safety net for unexpected market fluctuations, expense timing and grant activities.

“During my presidency, the Foundation identified a critical emergency issue—the soaring costs of energy for our Jewish organizations—and mobilized the community to address it. This initiative and others helped transform the Foundation from a charitable bank to a dynamic community partner. In addition, important programs such as the Book of Life and Jewish Women’s Foundation were established that have been warmly received and now engage many community members.”

—Jack Schuster
Jewish Community Foundation of San Diego

**Statement of Assets**

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jewish Community Endowment</td>
<td>$6,773,000</td>
<td>$5,934,000</td>
</tr>
<tr>
<td>Donor Advised Funds</td>
<td>83,601,000</td>
<td>82,820,000</td>
</tr>
<tr>
<td>Supporting Foundations</td>
<td>88,701,000</td>
<td>83,480,000</td>
</tr>
<tr>
<td>Custodial Funds</td>
<td>35,771,000</td>
<td>29,211,000</td>
</tr>
<tr>
<td>Restricted and Other Funds</td>
<td>9,181,000</td>
<td>7,458,000</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$224,027,000</td>
<td>$208,903,000</td>
</tr>
<tr>
<td><strong>Operating Expenses</strong></td>
<td>$1,332,000</td>
<td>$1,243,000</td>
</tr>
<tr>
<td>As Percent of Managed Assets</td>
<td>0.60%</td>
<td>0.60%</td>
</tr>
</tbody>
</table>

**Statement of Activity Highlights**

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2005</th>
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<tbody>
<tr>
<td>Grants to Charitable Organizations</td>
<td>$53,461,000</td>
<td>$45,971,000</td>
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<tr>
<td>Contributions from Donors</td>
<td>47,300,000</td>
<td>28,600,000</td>
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<tr>
<td>Custodial Fund Additions</td>
<td>9,300,000</td>
<td>6,200,000</td>
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<tr>
<td>Investment Income</td>
<td>15,573,000</td>
<td>11,765,000</td>
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</tbody>
</table>

A copy of the Foundation’s audited financial statements is available on request. The Foundation’s fiscal year ended June 30, 2006.

2000
Fiscal year grants reach $29 million, highest amount ever
investments

The Foundation’s investment policies allow leaders to address today’s community needs while also providing for future generations.

Three years ago, the Foundation introduced four investment pools with specific asset allocations and goals. Approximately 60% of assets are now held in the pools. The Foundation’s highly talented Investment Committee—including many professionals in the field—helps ensure that the pool returns compare favorably with the benchmarks. In addition, the Committee has engaged the respected firm of Wurts and Associates which specializes in developing asset allocation for endowment portfolios.

All of the pools have experienced strong performance over their three years of existence, particularly the Endowment Pool which is the largest at close to $100 million in assets. The Endowment Pool’s one-year return was 10.1%, and the three-year average annual return was 12.4%. Since its inception three years ago, the Endowment Pool has placed in the top third when compared with other endowments of universities, hospitals and other large nonprofit organizations across the country.

The Investment Committee also oversees investments outside of the pools. These investments must conform to the Foundation’s overall investment policy and are reviewed regularly by the Committee.

endowment pool

returns

- One year return: 10.1%
- Three-year average annual return: 12.4%

target asset allocation

- Equity: 36%
- International Equity: 22%
- Real Estate: 5%
- Fixed Income: 32%
- International Fixed Income: 5%

Total Target Equity: 63%
Total Target Fixed Income: 37%

2001

Foundation creates fund to help Jewish institutions meet soaring utility costs
governance

The Jewish Community Foundation has served the community for 40 years and will continue to engage many generations to come. Ensuring the Foundation’s long-term ability to meet the needs of the community and to preserve the legacies of donors requires watchful oversight and excellent governance. This includes compliance with both the spirit and letter of the law, acting with financial integrity and operating effectively and ethically.

leadership

The Foundation’s Board provides stewardship and management for all contributed funds. Serving without compensation, Board members approve grants, monitor investment performance and the budget, review compensation of senior staff members and oversee the operations of the Foundation. Individually, the men and women who comprise the Board represent the San Diego Jewish community’s most distinguished and experienced civic and business leaders.

audit

The Foundation undergoes an annual audit overseen by the independent Audit Committee. The audit is comprehensive to ensure that management is fulfilling its responsibilities in providing accurate and reliable financial information.

confidentiality

The Foundation adheres to a strict confidentiality policy. All information related to donors, individual balances, grantmaking issues and other matters is kept confidential.

ethics policy

The Foundation’s ethics policy governs the way business is conducted. Board members disclose and resolve all real and potential conflicts of interest through signing an annual disclosure statement. Decisions are made in the best interest of the community and using a framework of Jewish values. The Foundation considers the well-being and interests of donors paramount.

transparency

An essential ingredient for good governance is open access to information. The Foundation reports to the community in an honest, direct and intentional manner. The audited financial statements and IRS Form 990 are posted on the Foundation’s website.

2001

Foundation donors come to aid of 9/11 victims
committees

audit
Robert Lazarus, Chair
Edgar Berner
Emily Einhorn
Paul Nierman
John Ohanian
Andrew Ratner
Lawrence Sherman

board advancement
Jan Tuttleman,
Chair 2006/2007
Murray Galinson,
Chair 2005/2006
Edgar Berner
Sheila Potiker
Lawrence Sherman
Steve Solomon

legal
Lawrence Sherman, Esq.,
Chair
Jeffrey Silberman, Esq.
Steven Spector, Esq.

finance
Paul Nierman,
Chair 2006/2007
Emily Einhorn,
Chair 2005/2006
Amnon Ben-Yehuda
Cynthia Bolker
Ronald Friedman
Larry Katz
Dennis Lavine
Edward Thomas
Charles Tiano
Jerome Turk

grants
Martin Klitzner,
Chair 2006/2007
Claire Ellman,
Chair 2005/2006
Barbara Barsky
Michael Berlin

endowment leadership institute (ELI)
Jane Scher, Chair
Betty Byrnes
Elaine Chortek
Joseph Cohen
Barbara Haworth
Robert Lazarus
James Nierman
Sheryl Rowling
David Wax

D. Stephen Boner
Betty Byrnes
Jane Fantel
Nadine Finkel
Sandra Fisher
Laura Galinson
Alberta Feurzeig
Judy Fisher
Joan Jacobs
Felicia Mandelbaum
Brian Marcus
Brian Miller
Joseph Oppenheimer
Andrea Oster
Monica Handler Penner
Shirley Ravet
Jeffrey Ressler
Caryn Viterbi
Susan Chortek Weisman

investment
Andrew Ratner, Chair
Janet Acheatel
Marc Channick
Peter Chortek
Ted Finkel
Barry Kassar
Jerald Katleman
Jerome Katzin
Lewis Klein
Joseph Oppenheimer
Jack Schuster
Leo Spiegel
Eugene Step
Mark Stuckelman
Nessim Tiano

real estate
Jeffrey Silberman, Chair
Emily Einhorn
Eddie Goldberg
David Mandelbaum
Alan Nevin
James Nierman
Lawrence Poster
Lawrence Sherman
Ryan Stone

2001
First Book of Life signing ceremony held with 40 community members promising to establish a legacy for the future Jewish community
“My tenure as Foundation President was marked by growth—in dollars, number of participants, grants, and programs. The Endowment Leadership Institute was established which promotes a community camaraderie not previously seen in Jewish San Diego. Also during my term, the Foundation took the lead when devastating wildfires hit our area, receiving support from around the globe and expending funds wisely. During my final year as President, grants reached their highest point ever and our strengthened partnership with UJF enabled us to better serve the community.”
—Andrew Viterbi
section four

Annual Report 2006

estate and tax planning council

Edward G. Thomas, Co-Chair, 2006/2007
Ellen Whelan, Co-Chair, 2006/2007
George Alexander
Al Arias
Zoe Benditt
Barry Berelowitz
Michael Berlin
Edgar Berner
Cynthia Bolker
D. Stephen Boner
Lawrence Branton
Daniel Brecher
Bernard Breier
Arthur Brown
Janice Carmen

Robert Carne
Dawn M. Hall Cauthen
Marc Channick
Jack Charney
Paul M. Cheverton
Joseph Cohen
Kenneth Covene
James Cowley
Theodore Cranston
Ed Danenhauer
Sheldon Derezin
Paul Dostart
Irving Eisenberg
Clive M. Essakow
James Farley

Eloise H. Feinstein
Earl Feldman
Victor J. Ferrette
Robert Fink
Ted Finkel
Todd S. Frank
Ronald A. Friedman
Richard A. Gaines
Eric Gardiner
Jay Gelbart
Robert C. Gelman
Richard Glasner
Andrew Glatt
Thea Glazer
Ryan Goldenhar
Donald Goldsmith

Mark Gordon
Barry Graff
Orin Green
Carlee Harmonson
Ann Harris
Nancy G. Henderson
Stanley Heyman
David L. Hickson
Lawrence Kaplan
Hillel Katzef
Gary Kornfeld
Kevin Kravets
Archie Kuehn
James Lauth
Dennis Lavine
Robert Lazarus

“I always encourage my clients with charitable intentions to establish a donor advised fund or supporting foundation with the Jewish Community Foundation rather than go the private foundation route. The tax benefits, administrative and grantmaking support, excellent service and connection to the community cannot be beat.”

—local cpa

Jahja Ling, Joan Jacobs, Min Lee and Irwin Jacobs at the Appreciation Event for the Estate and Tax Planning Council at the San Diego Symphony

2002

Jewish Women’s Foundation established

2003

Leadership Council comprised of former Board members established with Elaine Galinson as Chair
2003
Foundation establishes Jewish Community Disaster Fund to assist victims of San Diego Wildfires—hundreds of contributions received totaling almost $400,000

2004
Donor survey yields positive results with 100% of Foundation donors indicating that they would refer Foundation to a friend

"During my term, Foundation leadership was able to build upon the groundwork and desire of previous Foundation presidents to become an independent entity and provide our donors with the utmost confidence and good fiscal oversight. At the same time, we worked closely with UJF to build a stronger Jewish community. In addition, the Endowment Leadership Institute progressed and developed into a national model for endowments which will not only impact San Diego Jewish organizations in the future but also apply to many other communities."

—Edgar Berner

"My client wanted to establish a philanthropic legacy, but he was unclear about the best direction. The Foundation’s staff met with my client and listened carefully as he talked about the issues and causes that mattered to him. They then suggested legacy beneficiary possibilities and ways for him to make a real impact for future generations. My client’s response to the program ideas helped further clarify the approach that most closely resonated with his goals. Plus the fact that the Foundation will oversee his legacy gives my client great comfort."

—Local estate planning attorney

2004-2006

Edgar Berner
President


When you teach your child, you teach your child’s child.”

Talmud

2004
Foundation assets top $200 million

2004
Endowment Leadership Institute established—becomes a successful national model and one of the first Jewish community programs engaging all denominations
The Jewish Community Foundation thanks outgoing Board members Mel Cohn, Steve Solomon and Gene Step for their invaluable leadership and contributions.

2004
Foundation celebrates highest year of grantmaking ever with more than 3,500 grants totaling $57 million
jewish community foundation staff

From left to right, back row:

Meryl Goldberg
Financial Analyst

Marissa Garfield
Program Officer

Traci Serrano
Office Manager

Charlene Seidle
Associate Director

Myrna Holmes
Controller

Sarah Hoisington
Receptionist

From left to right, front row:

Jamie Zander
Office Associate

Gail Littman
Director of Endowments

Marjory Kaplan
Chief Executive Officer

Jeremy Pearl
Chief Financial Officer

Cynthia Zena
Staff Accountant

2005
Foundation donors rally to assist Hurricane Katrina victims

2005
Name legally changed to Jewish Community Foundation of San Diego
Increase the effectiveness of charitable giving through partnering with the Jewish Community Foundation of San Diego

**simplicity**
The Foundation handles all administration so you can concentrate on where to give.

**increased tax benefits**
As a public charity, contributions to the Foundation are likely to have a greater tax advantage than private donations.

**flexibility**
The Foundation handles a variety of giving vehicles that can accept all kinds of assets and can be customized to meet your giving interests.

**economical**
If each individual fund operated independently and had to recreate services on its own, the price tag would be enormous.

**professional management**
Foundation assets are invested carefully and strategically, closely overseen by the Foundation’s top-notch Investment Committee and Board.

**recognition or anonymity**
Contributions and grants may be made in a person or company’s name—or anonymously.

**large or small gifts**
Individual gifts of any size may be made for general charitable use or to any fund. Donor Advised Funds may be established for as little as $1,800.

**large or small grants**
The minimum grant from a fund at the Foundation is just $100. This is one of the lowest minimums nationally.

**strategic giving**
Because the Foundation distributes millions of dollars to the community, the professional staff can assist in making giving more strategic and meaningful.

**permanent**
The Foundation will continue for generations to come under the guidance of the most experienced community leaders.

**what to give**
- Appreciated stocks and bonds
- Cash
- Closely held stock
- Life insurance policies
- Mutual fund shares
- Private foundation assets
- Real estate
- Retirement plans
- State of Israel bonds

**ways to give**
- Bar/Bat Mitzvah Funds
- Bequests through wills and trusts
- Charitable Gift Annuities
- Charitable Remainder Trusts
- Donor Advised Funds
- Endowment Funds
- Family Foundations
- Jewish Women’s Foundation
- Memorial Funds
- Pooled Income Fund
- Wedding Funds

2006
National recognition obtained through citation in the Chronicle of Philanthropy and Forbes lists of America’s Top 200 Charities

2006
Another record-breaking year as Foundation prepares to mark 40th anniversary
Jewish Community Foundation San Diego

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