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Philanthropy News *Quarterly*

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OUR MISSION

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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ELI Transforms the Culture of Giving in San Diego

With pomp and circumstance, the Jewish Community Foundation of San Diego graduated the first class in its Endowment Leadership Institute (ELI) this spring. Three years after the program launched with the goal of transforming the culture of legacy giving in San Diego, the results speak for themselves: so far, almost 500 families have stepped forward to promise an estimated \$120 million for the community.



Members of the ELI Committee, l to r: Elaine Chortek; James Nierman; Jane Scher, chair; Betty Byrnes; David Wax; Gail Littman, director of endowments. Not pictured: Joseph Cohen, Barbara Haworth, Robert Lazarus and Sheryl Rowling.

And that's just the beginning. Even as it graduated its first class, ELI enrolled a second class of eight community organizations, and launched a graduate program for the initial group of 12 participating community organizations.

The ELI program has succeeded in helping almost 500 families leave

legacies to ensure the future of the community. In the process, 100 volunteers and professionals learned together how to build endowments for their synagogues, community agencies and day schools.

"Leaders not only *learned together* about how to raise endowments, they *worked together* throughout the process," said **Jane Scher, ELI Committee chair**.

"I was so pleased with the friendly collaboration between organizations."



 **Jewish
Community
Foundation**
San Diego

Jewish Women's Foundation Invests in Jewish Teenage Girls



Members of the Jewish Women's Foundation: Top row, l to r: Elaine Chortek, Judy Fisher, Linda Platt, Melissa Garfield Bartell, Judy Feldman, Jane Fantel, Helene Ziman. Center row: Toby Eisenberg, Barbara Sherman, Ellen Marks, Marjory Kaplan, Betty Byrnes, Julie Bronstein, Charlene Seidle. Front row: Orit Ostrowiak, Phyllis Epstein, Barbara Lubin, Chair Marcia Hazan, Jerri-Ann Jacobs, Jan Tuttleman, Elaine Galinson. Not all JWF members were present for the photo.

To mark five years of improving the lives of Jewish women and girls, the Jewish Women's Foundation (JWF) has funded a second initiative – an investment in Jewish teenage girls. The JWF recently awarded funding to enable the Agency for Jewish Education to continue and expand **Rosh Hodesh: It's a Girl Thing**, which addresses the specific issues of adolescent girls from a Jewish perspective.

The program, unique in San Diego, brings together small groups of girls for monthly Rosh Hodesh (new moon) celebrations. Each group is facilitated by an educator with specific training to draw life lessons from Jewish values while exploring such issues as body image, friendship, relationships, assertiveness, stress and family. The safe and supportive atmosphere is designed to

enable girls to articulate questions and concerns, to connect to peer and adult mentors, and to build Jewish identity.

The JWF established its first program, Supporting Jewish Single Parents (SJSP), at Jewish Family Service three years ago and continues to significantly fund the program. SJSP connects single mothers and their families to the Jewish community and advocates for their needs. The JWF consists of more than 70 women who have joined together to improve the lives of Jewish women and girls in San Diego, Israel and around the world.

For information on JWF membership, please contact Charlene Seidle at charlene@jcfsandiego.org or Jaclyn Adler at jaclyn@jcfsandiego.org or 858-279-2740.

Sharing the Wealth: Foundation Hosts Investment Seminar

In May, the Foundation hosted an investment program for 40 Endowment Leadership Institute participants and other community organizations, featuring Shelly Heier, CFA, of the Foundation's investment consulting firm, Wurts & Associates, Inc.

Heier explained that the Foundation's investment approach includes attention to such critical factors as risk, asset allocation and a strict endowment-spending policy.

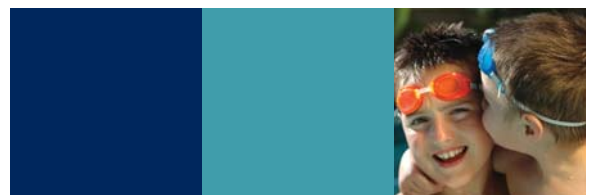
"The Foundation offers economies of scale, best-practices, and careful oversight to the community," **Andy Ratner, chair of the Foundation's Investment Committee**, told participants.

"Our endowment pool has performed strongly, and we are very pleased to be able to explain our investment strategies."

Over the past three years, the Foundation's endowment pool has averaged an annual return of 10.9 percent.

"Studies have shown the vast majority of portfolio performance is attributable to asset allocation. Our approach with the Jewish Community Foundation is to maximize return while managing risk to ensure the most dollars for the community."

—SHELLY HEIER OF WURTZ & ASSOCIATES, INC.



Celebrating 40 Years of Giving



Above, l to r: Gary Jacobs, Sherron Schuster, Jack Schuster, Carole Turk, Jerry Turk; Jerome and Miriam Katzin



At right, guest dined on sumptuous hors d'oeuvres before they previewed the Israel Museum show, Journey to the Copper Age.

Below right: Foundation CEO Marjory Kaplan; Co-Chairs Murray Galinson and Elaine Galinson; Foundation Chair Sheila Potiker



*“We commemorate
the collective vision that
has built a vibrant and
strong Jewish and general
community in San Diego”*

—HONORARY COMMITTEE CO-CHAIRS
MURRAY AND ELAINE GALINSON



*Susan Lapidus, Felicia Mandelbaum,
Robert Lapidus*



*Roy Sable, Joan Sable, Jane Scher,
Colin Scher*



The Jewish Community Foundation was proud to celebrate its 40th anniversary with nearly 500 of San Diego's philanthropic leaders on May 31, 2007. The celebration brought together philanthropists with the non-profit organizations—both Jewish and secular—that deliver services to San Diegans.

At the elegant, high-energy evening at the San Diego Museum of Man, the Foundation thanked the community for 40 years of charitable giving. Mayor Jerry Sanders was among the dignitaries in attendance.



The Jewish Community Foundation is most grateful to the event underwriters:

DLA Piper

Carleton Management, Inc.

San Diego National Bank

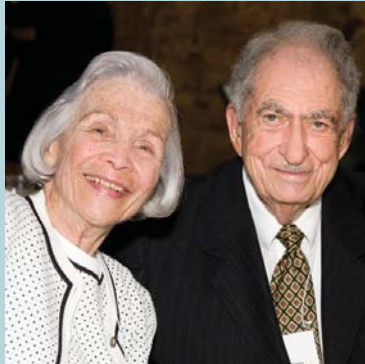
Scripps Investments and Loans, Inc.

AKT, LLP

Goldman Sachs & Co.

San Diego Private Bank

Celebrating 40 Years of Giving



Top row, l to r: Stacy Halberg, Jonathan Halberg, Emily Einborn, Dan Einborn; Joe Fisch, Larry Katz, Shearn Platt; Andy Ratner

2nd row: Mickey Cohen, Lois Richmond; Jean Gordon, Herman Gordon; Lawrence Sherman, Cary Sherman; Gordon Kovtun, Annika Kovtun

3rd row: Marnie Klein, Lewis Klein; Paul Nierman, Deborah Horwitz, Ellen Whelan; Rabbi Leonard Rosenthal, Judy Rosenthal

4th row: Past presidents of the Jewish Community Foundation

Back row: Edgar Berner; Rodney Stone; Lawrence Sherman; Andrew Viterbi; Jack Schuster. Front row: Shearn Platt; Pauline Foster; Herbert Solomon; Sheila Potiker, chair; Jerome Katzin. Not pictured: Nessim Tiano.



donor spotlight Naomi R. and Al Eisman

Naomi R. Eisman's benevolence is grounded in her memory of being a single mother in Los Angeles many years ago. Today, her generosity knows no bounds.

Naomi and her husband Al Eisman established a fund at the Foundation to improve lives through philanthropy. Over the last year, Naomi has worked with Associate Director Charlene Seidle to define the couple's charitable passions and goals. After identifying Jewish continuity, education and Israel as key interest areas, Naomi and Al have made an enormous difference.

Through their Donor Advised Fund at the Foundation, Naomi and Al have supported scores of organizations in the Jewish and general community. They've funded cultural outreach and preschool programs at the Lawrence Family JCC and supported a scholarship at the Soille San Diego Hebrew Day School. They helped create a First Aid Station in Sderot, Israel, for Magen David Adom, funded programs for Ethiopians and single mothers in Israel through the American Jewish Joint Distribution Committee, and supported the Supporting Jewish Single Parents Program at Jewish Family Service, which was established by the Jewish Women's Foundation.

Naomi and Al are also passionate about programs serving women and children. Among many other programs, they've funded a school for girls in Nigeria as well as microfinance programs in that country. The Al and Naomi Eisman Fund has also provided assistance to students at the Monarch School for homeless and at-risk youth in San Diego.



Naomi R. Eisman (seated) and Associate Director Charlene Seidle (standing) visited the Monarch School for homeless and at-risk children, where Naomi enjoys making a difference.

"Monarch was around the corner from us for 20 years. Yet until the Foundation connected us, I didn't realize this community treasure existed," noted Naomi.

"This is just one example of how the Foundation is positioned to impact and inspire philanthropy," said Seidle. "It's truly a personal privilege and blessing to work with donors like Naomi and Al Eisman!"

strategies for giving

Got Landlord Fatigue? Remedy: Donate Your Real Estate

Many families own appreciated real estate investments. While real estate can represent a valuable asset on the balance sheet, it may be producing little or no return. Further, selling real estate outright may trigger a capital gains tax on the appreciated value.

Recently, the Foundation's Real Estate and Gift Acceptance Committee reviewed such diverse properties as land and commercial office buildings. The committee, **chaired by Jeff Silberman**, conducts due diligence and reviews factors to evaluate whether a property is a suitable donation.

When real estate is accepted, the Foundation sells the property. The donor may then begin putting the proceeds to use in grants to the community.

Tax laws reward donors' generosity with a significant reduction in taxes owed. Donors may bypass the capital gains tax and receive a charitable income tax deduction. The proceeds can be distributed to a Donor Advised Fund, family foundation or endowment fund. Property may also be used to fund a charitable remainder trust which produces lifetime income for the donor.

To explore gifts of real estate, please contact CFO Jeremy Pearl at 858-279-2740 or jeremy@jcfsandiego.org.

This information is provided as an educational service without cost or obligation. Individuals and families should consult personal professional advisors when considering charitable planning options.

Welcome New Funds

Corinne Joyce Moss Memorial

Joseph J. Fisch

Morris and Phyllis Gold

Gresoro Family

Robin and Raphael Gross Family

Hotto Charitable

Jenny Poliakoff Friendship

Circle Endowment

Bernard and Dorris Lipinsky Family

Jean McGregor

Oratz Family

Michael and Amy Stern

Welcome New Board Members

Marcia Hazan is chair of the Jewish Women's Foundation and is a Board member of the Foster Family Foundation and the Galinson Family Foundation.

Jeffrey Ressler serves on the Foundation's Grants Committee and has been active in promoting the Foundation as a philanthropic resource.

Sheryl Rowling, CPA/PFS, serves on the ELI Committee and is a member of the Foundation's Estate and Tax Planning Council.

Sherron Schuster, a longtime community volunteer, is a member of the Jewish Women's Foundation.

Welcome New Staff

Systems Manager David Bean

joined the Foundation from MicroEdge, Inc., the leading provider of grants management software solutions.

Office Associate Alexandra

"Zanni" Davis is a graduate of the University of Arizona with a degree in anthropology.

The Foundation is also pleased to announce the recent promotions of **Jaclyn Adler** to Donor Services Associate and **Jamie Zander** to Foundation Associate.



board+staff

Executive Committee

Chair

Sheila Potiker

Vice Chair and Chair Elect

Murray Galinson

Vice Chairs

Emily Einhorn

Joan Jacobs

Jan Tuttleman

Treasurer

Paul Nierman

General Counsel

Lawrence Sherman

Secretary

Jane Scher

Immediate Past Chair

Edgar Berner

Chair, Leadership Council

Elaine Galinson

Chief Executive Officer

Marjory Kaplan

Directors

Elaine Chortek

Joseph Cohen

Claire Ellman

Elliot Feuerstein

Henry Haimsohn

Marcia Hazan

David Kabakoff

Martin Klitzner

Robert Lazarus

Kenneth Polin

Andrew Ratner

Jeffrey Ressler

Sheryl Rowling

Sherron Schuster

Jeffrey Silberman

Brian Tauber

Jerome Turk

Andrew Viterbi

David Wax

Eric Weitzen

Staff

Marjory Kaplan

Jaclyn Adler

David Bean

Julie Bronstein

Alexandra Davis

Marissa Garfield

Meryl Goldberg

Zoraida Gudino

Emily Jennewein

Gail Littman

Jeremy Pearl

Charlene Seidle

Traci Serrano

Jamie Zander

Cynthia Zena

Upcoming San Diego Grantmakers Programs

- Nov. 8, 2007: Annual conference, which the Foundation's Associate Director Charlene Seidle will co-chair
 - Third Thursday Breakfast Series:
 - Aug. 16: Snapshot San Diego: Changing Demographic Trends
 - Sept. 20: Making Measures Work for You: Outcomes and Evaluation
 - Oct. 18: The ABCs of 123s: A User's Guide to Nonprofit Financials
 - Nov. 15: Reflections from Stanford: Conversations in Philanthropy
- Contact the Jewish Community Foundation to RSVP at 858-279-2740 or info@jcfsandiego.org.



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