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# Strategies for Giving

Do you want to make life better for Jews in San Diego and around the world for generations to come? Once you make that decision, it's a simple process to include the Jewish community in your will.

Think about your charitable goals. Consult the legacy planning information in this issue of the newsletter. Discuss the issues with your favorite organizations and the Jewish Community Foundation. Consider how you can best make a difference.

Talk with your professional advisor about how a charitable gift may affect other provisions for your family, as well as planning for maximum tax benefits. Your advisor will know what method of giving suits your needs.

Get the correct language from the organization(s) to make the gift, whether you add it to your will as a codicil or in a living trust

Consider creating an endowment at the Jewish Community Foundation to benefit multiple organizations and causes and to benefit the community in perpetuity.

**Did You Know?** Your promise to provide for the Jewish community enables you to sign the Jewish Community Foundation Book of Life. By inscribing your name and including a personal message, you express your belief in and commitment to Jewish values and heritage.

*"Establish the work of our hands, that it may long endure"*  
— psalms

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## Learning By Doing

### Strategies Used by Foundation Families

#### ■ Create Donor Advised Funds for Second Generation

Funds can be established for as little as \$1,800. The minimum grant amount is just \$100.

#### ■ Establish Discretionary Funds

Give to the causes you love in the name of your family.

#### ■ Hold Regular Family Discussions

Ask your family members to research organizations and share their favorites. Talk about your family history and how *tzedakah* has played a role.

#### ■ Visit Programs Together

There is no substitute for meeting the people impacted by your support.

#### ■ Access the Foundation's Resources

Let us help you research areas of interest and provide information about community needs.



## Dor L'Dor

### From Generation to Generation

How can you best engage the next generation in giving? The answers can be as varied and creative as the families asking the question. Here are a few strategies crafted by Foundation donors that may give you some ideas.

Lisa Braun-Glazer and Jeff Glazer recently created donor advised funds for their daughters Anna, 17 and Julia, 21. "It was important to us that our children be able to begin to make and act upon their own philanthropic decisions, so as to set the stage for their independent giving as adults. The Foundation's liberal policy for the creation of donor advised funds allowed us to make this happen," said Lisa.

"Anna's already used her fund to support her senior class project at La Jolla High," noted Jeff. "Setting up the funds was an ideal opportunity to enable our daughters to follow in our footsteps, while having the independence to fund projects of their own interest."

Barbara Bloom's four sons, Jeff, Larry, Scott and Todd, each have an annual amount of money that they can distribute from the Bloom Family Fund. These discretionary funds are separately tracked by the Foundation. "The funds have been very beneficial in helping our family think about the causes that are most important to us," said Barbara. "We've given to organizations as varied as the United Jewish Federation, our synagogues, the Honorary Deputy Sheriffs Association and Kids Included Together. What unites us is the goal of improving the community."

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IF YOU WERE AT EITHER of the **Endowment Leadership Institute (ELI)** sessions in April or June, you could feel an excitement in the air. More than 40 lay and professional leaders from 12 local Jewish organizations, schools and synagogues gathered together to learn about how to help people leave a legacy for the Jewish community. Through ELI, the Foundation is partnering with each of these agencies in a special three-year program of coaching, training and mentoring. It is one of the few programs in which all major denominations and constituency groups are represented.

In the ten weeks since the program was established, **more than 50 bequests have been secured for**

**almost \$7 million** in anticipated gifts and current endowments for the community. "ELI has helped us focus on our loyal, long-term donors," said Rabbi Simcha Weiser, headmaster of the Soille San Diego Hebrew Day School. "We now have the tools to enable people to fulfill the key mitzvah of providing for future generations."

The gifts identified have been directed not only to the 12 participating organizations, but to other local Jewish community groups as well as to programs in Israel. "There are so many people who are would be happy to establish charitable bequests, if they were only asked," noted ELI Chair Jane Scher.

## Leave a Jewish Legacy™



Clockwise from top: David Wax and Ana Kozlowski from the JCC; the group takes in the initial meeting of ELI; Edgar Berner, Foundation president; Stuart Simmons and Ann Mound of Congregation Beth Israel.

## Dor l'Dor

*continued from front cover*

Peter and Elaine Chortek recently established three endowment funds within the **Chortek Family Foundation** to support the **Agency for Jewish Education**, **Hillel of San Diego** and the **San Diego Jewish Academy**. Every year, the director of each agency will meet with members of the Chortek Family Foundation including Peter and Elaine's children, Susan and Robert, to report on how the earnings of the fund were used.

"When our grandchildren are older, they'll join the meetings as well," said Peter. "We hope this will help keep them engaged and excited."

C. Hugh Friedman and Lynn Schenk encourage their granddaughter, Rachel Peniche, and nephew, Ben Schenk, to give them suggestions for grants from the **C. Hugh Friedman and Lynn Schenk Fund**. "Rachel and Ben take the responsibility very seriously, and they carefully consider the programs and people that have impacted their lives," noted Lynn. Grants recommended by Rachel and

Ben have included distributions to **St. Clare's Home**, a shelter for abused women where Ben did volunteer work; **Children's Hospital**; and the **San Diego Jewish Academy**.

Other families hold regular discussions about giving, visit programs together or enroll their children in the Community Youth Foundation. Many combine several of these strategies. "At the end of the day," said Peter, "it's all about *dor l'dor*, passing our values from one generation to the next."

# Creating Your Legacy

It's easy to leave a Jewish legacy. Here are some items to consider.

**When should I start to think about leaving a legacy?** Jewish tradition teaches that one of our key duties is to make the world a better place for future generations. The time is always right to think about how you wish to be remembered.

**How can my legacy reflect what is important to me?** Your legacy planning can be a meaningful, life-changing experience. Picture the community decades from now. What do you see? Consider institutions and causes you are involved with now. What have been your most significant gifts and which have provided you with the most satisfaction? Through your

legacy, you can ensure that the organizations you love thrive in perpetuity and the issues you are most concerned with continue to be addressed.

**How should I fund my legacy?** With the help of the Foundation and your professional advisors, you can carefully and creatively choose the assets to help fund your legacy. Examples include retirement funds, highly-appreciated stock and real estate.

**When should I fund my legacy?** Depending on your assets and goals, you can fund your legacy now or after your lifetime. For example, if you feel there is a compelling need to provide scholarships to Jewish day schools for needy children, you can begin those scholarships now and direct your estate to complete the balance of the funding. Alternatively, you can designate your entire legacy to be funded after your lifetime if that is more appropriate for you.

**How should I structure my legacy?** Depending on your goals, your legacy can be structured in the way that is most advantageous for you. You, your spouse and family members can receive income for life through charitable gift annuities, charitable remainder trusts and pooled income funds. Or your legacy can be a simple bequest in your will or trust.

**How can I get started?** Simply call the Jewish Community Foundation at 858-279-2740 or your favorite organization(s) for a confidential meeting. We look forward to working with you to keep our community strong and vibrant for generations to come.

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

—Talmud

## Foundation News

### New Heights in Assets and Grantmaking

As the Jewish community's center for giving, **grants awarded by the Foundation in fiscal year 2004 reached the highest amount in our history**, announced Executive Director Marjory Kaplan. More than **\$53 million** was distributed to secular and Jewish charitable organizations in San Diego, throughout the United States, in Israel and around the world. Even with the distribution of record grants, the **Foundation's assets have soared to more than \$200 million**. A full report will be included in the next issue of *Philanthropy Quarterly*.



### Staff News

Welcome to **Tiana Arellano** who has joined the Foundation staff as Receptionist and **Steve Pedro** who has assumed the position of Staff Accountant.

Congratulations to **Charlene Seidle** for her promotion to Associate Director, and **Traci Serrano**, newly named Office Manager.

Congratulations to **Cindy Bertrand** who has been named Chief Financial Officer and **Myrna Holmes** who has been promoted to Controller.

The Foundation's staff is committed to providing you with excellent service. Please feel free to call on us at any time to help make your giving strategic and meaningful.

### New Minimum for Donor Advised Funds

The minimum amount to establish a donor advised fund with the Foundation **has been reduced to \$1,800**. If you don't already have a fund, consider using this tax-savvy way to help the community. If you do, please think about referring a friend.

## Ideas for Giving: *Education*

*Each issue of Philanthropy Quarterly features several giving opportunities in a certain area of need.*

*This quarter, the theme is education—a key Jewish imperative and one of the main tools we have to ensure the continuity of our people. Of course these are only a few of many excellent programs that need support.*

*We welcome your program ideas for future issues.*

"And you shall teach  
your children."  
—Exodus

### Annual Campaign United Jewish Federation of San Diego County

United Jewish Federation of San Diego County (UJF) is the central Jewish community planning and fundraising organization. The UJF Annual Campaign supports many vital community programs as well as important projects for Jews in Israel and 60 countries around the world. Through its network of organizations, UJF helps the young, the old, the poor, the sick, the immigrant, and those who are persecuted or oppressed, all in the name of the San Diego Jewish community.

The UJF Campaign also provides important funding for each of the five local Jewish day schools, enabling many more children to attend and supporting creative programs



### Educating and Connecting Teens: High School for Jewish Studies Agency for Jewish Education

The high school years are a crucial time that set the stage for lifetime identity and connections. The HSJS is the only community-wide supplementary program that educates Jewish teens about their heritage and provides opportunities for them to socialize with one another and build friendships.

- Serves about 280 students in grades eight to twelve
- Offers multiple courses and topics including Judaic text study, life cycle events, Jewish law, ethics and the arts
- Encourages overseas experiences through the March of the Living and Alexander Muss High School in Israel

### Teaching the Teachers: Coaching Agency for Jewish Education

Hundreds of children are served through our local synagogue supplementary schools. For many, this is their sole educational exposure to Judaism during their formative years. A master teacher/coach mentors novice teachers, assessing their instruction methods and suggesting skills and strategies to improve techniques.

- Serves more than 25 educators in synagogue supplementary schools across the county
- Shapes new behaviors that result in more effective teaching and classroom management
- Holds regular group workshops to augment program

### Bridging the Jewish Journey: B'nai Mitzvah Hillel of San Diego

College is a time of great exploration for young adults, and the Jewish journey is often part of that exploration. Just as more and more congregations have implemented Adult *B'nai Mitzvah* programs, Hillel at SDSU and UCSD have created successful study and spiritual opportunities to meet the needs of students who did not previously have their *Bar* or *Bat Mitzvah*.

- Weekly classes in prayer, rituals, life cycle events and Hebrew language
- Annual Shabbat service led by students

(over please)





### **Promoting Jewish Knowledge: Astor Judaica Library Lawrence Family JCC**

The Library implements community educational and literary programs. Individuals and groups of all ages, denominations and interests visit the library to read alone, meet study partners or find books for research and pleasure.

- Welcomed more than 200 visitors per month since opening in 2000
- Extensive special collections on the Holocaust, Israel and women's issues
- Special children's section which houses educational activities and storytimes
- Computer workstations with high-speed Internet access, multi-media resources

### **Enabling Day School Education for All: Jewish Day School Marketing Initiative and Jewish Day School Endowment Fund for Scholarships**

Study after study has demonstrated that children who attend Jewish day schools participate in Jewish activities and make Jewish life choices at higher levels than those who do not attend day schools. All five local day schools—Beth Israel Day School, Chabad Hebrew Academy, San Diego Jewish Academy, Soille San Diego Hebrew Day School and Torah High School—are working together to jointly market the benefits of a day school education and ensure that it is accessible to all.

- Pilot joint marketing initiative will brand day schools through widespread advertising and community events
- Endowment fund distributes five percent annually to each school based on previous scholarship activity

### **Providing Scholarship Assistance in Israel: Sapir College, Sha'ar HaNegev**

San Diego's partnership community, Sha'ar HaNegev, is home to Sapir College which serves 7,500 students and boasts an excellent academic reputation. The region is economically depressed, and many deserving youngsters from low-income families are unable to afford tuition.

- Students include recent immigrants and native Israelis



- Requirement of community service within the region

### **Hemda Center for Science Education Tel Aviv Foundation**

Established in 1991, Hemda is Israel's leading center for science education for junior high and high school students. Through specialized instruction, Hemda builds a new cadre of potential scientists for research and development in the Israeli Defense Forces and in academic institutions. These are the people who will lead the state of Israel into the future.

- Highest level of chemistry and physics courses
- Extracurricular science workshops and personalized tutoring
- More than 500 gifted students now on waiting list, unable to participate for lack of resources

If you have questions about any of the programs featured or would like information regarding other giving opportunities, we stand ready to assist you. Please call the Foundation at (858) 279-2740.