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# Philanthropy NewsQuarterly

A publication of the Jewish Community Foundation of San Diego  
online at [www.jcfsandiego.org](http://www.jcfsandiego.org)

## Growing Up Giving

It's never too early—or too late—to teach children how to put the principles of *tzedakah* into practice. But the earlier you teach the habit of giving, the easier it will be for children to learn. Here are several ways Foundation families help shape philanthropic values and teach their children that giving can be rewarding.

**Set aside funds to give together:** On the fourth night of *Chanukah*, one family takes the amounts they would have otherwise spent on gifts and instead pools it for a joint gift to charity. Together, they review request letters and decide—as a family—where to give.



Photo courtesy UJC/Lloyd Wolf

### Challenge grandchildren with charity:

Another donor challenges his grandchildren to go out and find organizations they believe are making a difference in our community. Each nonprofit chosen is awarded a set amount along with a letter from the child.

**Make a matching contribution:** One parent promises her children that if they give any amount of their gift money to a charity, she will match the gift, doubling the children's impact.

**Establish a fund:** Several young people have established donor advised funds with the Foundation in honor of their *bar* and *bat* mitzvahs or at other milestones. Funds are often added by parents and grandparents.

**Hold family discussions:** Many families talk openly with their children about their own giving and volunteerism and provide experiences that expose the young person to new possibilities.

Teaching children the values of *tzedakah* is not only one of the greatest gifts you can bestow on them but also can be an incredible legacy for the future of the Jewish community.

### 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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 **Jewish  
Community  
Foundation**  
San Diego

# Jewish Women's Foundation Hosts Ruth Messinger at Installation of Marcia Hazan

*"Through the JWF I have been challenged to think proactively and have learned to become a more effective philanthropist."*

MARCIA HAZAN

At a special event in September, **Marcia Hazan** was installed as Chair of the Jewish Women's Foundation (JWF), succeeding **Betty Byrnes**. The luncheon was an opportunity for JWF members to highlight their successes and introduce other women to their important work as funders, decision makers and agents of change in the community. The event was held at the home of **Jan Tuttleman**, JWF Founding Chair.

The installation event featured **Ruth Messinger**, President of American Jewish



L-R Marcia Hazan, Ruth Messinger, Marjory Kaplan and Jan Tuttleman

World Service (AJWS), who spoke about **Women as Global Agents of Change** and noted that the JWF is a model of women proactively changing the world around them. Ruth discussed the

AJWS's role in third world countries supporting women who are making positive changes in their own communities by starting their own businesses and grassroots social change programs.

## Web Resources for Engaging Youth in Giving



### Jewish Youth Philanthropy

[www.jphilanthropy.com](http://www.jphilanthropy.com)

### Spark Partnership for Service

[www.sparkspfs.org](http://www.sparkspfs.org)

### Learning to Give

[www.learningtogive.org](http://www.learningtogive.org)

### Giving Forum

[www.givingforum.org/knowledgecenter/youth\\_index.html](http://www.givingforum.org/knowledgecenter/youth_index.html)

### Jewish Funders Network

[www.jfunders.org](http://www.jfunders.org)

### Panim Institute for Jewish Leadership and Values

[www.panim.org](http://www.panim.org)

# Endowment Leadership Institute Continues Success

In just one month preceding the High Holy Days, **more than 55 individuals and families** stepped forward to promise legacy gifts for the 20 organizations, synagogues and schools participating in the Foundation’s Endowment Leadership Institute (ELI).

“These legacies reflect the sincere trust that members of the community have in our local Jewish organizations,” said **Jane Scher**, ELI Chair. “In addition, they demonstrate a faith in future generations to make effective decisions and to address changing needs.”

Since the program’s inception in April 2004, **an estimated more than \$61 million has been promised by 340 community members** to ensure the future stability and vibrancy of 35 Jewish organizations and more than 20 organizations in the general community.

The program is now being replicated nationally and is being used as a model for various denominations and groups to come together for the good of the community.

Organizations participating in ELI include:

Agency for Jewish Education	Hillel of San Diego	Temple Adat Shalom
Chabad of University City	Jewish Family Service	Temple Emanu-El
Congregation Adat Yeshurun	Lawrence Family Jewish Community Center, Jacobs Family Campus	Temple Solel
Congregation Beth Am	Ner Tamid Synagogue	Tifereth Israel Synagogue
Congregation Beth El	Ohr Shalom Synagogue	United Jewish Federation of San Diego County
Congregation Beth Israel	San Diego Jewish Academy	
Congregation Beth Jacob	Soille San Diego Hebrew Day School	
Congregation Dor Hadash		

foundation news

## Growth Continues

The Foundation reported **assets** of **\$224 million** at fiscal year-end, the highest level ever. **Grants** for the last year exceeded **\$53.5 million**, with a record 3,900 separate distributions.

## Excellent Investment Performance

The Foundation’s investment pools continue to experience strong performance. The Endowment Pool is the largest and reported a **one-year return of 10.1%** and a **three-year average annual return of 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.

## Welcome New Funds

Stanley F. Bernstein  
Goldstein Tzedakah  
Steven Oberman  
Dorothy and Saul Roth Memorial  
San Diego State University Jewish Studies  
Wangers Family

## Welcome New Staff Member

The Foundation is pleased to welcome **Jamie Zander** to the staff as Office Associate. Originally from New Orleans, Jamie is a recent graduate from the University of Arizona with a degree in Communications.

## Upcoming San Diego Grantmakers Programs

*San Diego Grantmakers is a regional group of foundations and corporations engaged in philanthropy. Donors at the Foundation are welcome and encouraged to participate in the group’s educational offerings.*

### Distinguished Speaker Series: Mayor Jerry Sanders, A Philanthropic Lens for San Diego's Future

November 1, 2006 11:30am-1:00pm

### A Forum on Immigration: Implications for Funders

November 9, 2006 8:30 am- 10:30 am

For more information on any of these events, please contact the Foundation or San Diego Grantmakers at 619-744-2180.

# strategies for giving

## Pension Protection Act of 2006

Recently, the President signed into effect the Pension Protection Act of 2006 (PPA) that may have significant relevance to your charitable planning. The PPA permits **individuals above the age of 70 1/2 to rollover up to \$100,000 from an IRA directly to a qualifying charity** without recognizing the transfer as income. The transfer counts toward the minimum annual distribution requirement.

Although the Act does not allow individuals to rollover funds to a donor advised fund or supporting foundation at the Foundation or to a private foundation, restricted endowment funds or the Foundation's Jewish Community Endowment are appropriate beneficiaries. This could be a wonderful opportunity to make capital gifts, create endowments and/or pre-pay multi-year commitments to charitable organizations.

The Pension Protection Act only applies in 2006 and 2007, so you are encouraged to consult with your accountant as soon as possible to determine if this opportunity is right for you.

## Foundation Honored at National Philanthropy Day

At San Diego's National Philanthropy Day celebration on November 15th, the **Jewish Community Foundation will be presented with a special award honoring 40 years of giving**. National Philanthropy Day is sponsored by the Association of Fundraising Professionals and is a major community event, usually attracting almost 1,000 attendees.

For the last three years, the **Foundation has given away more grants than any other local organizations**—significantly impacting both the Jewish and general communities. The award is shared by all who have contributed to the Foundation's growth and success—the many donors, organizations and committed leaders who have developed the Foundation into the center of philanthropy for San Diego's Jewish community.

For more information on National Philanthropy Day or to register to attend the event, please visit [www.afpsd.org](http://www.afpsd.org) or call the Foundation.



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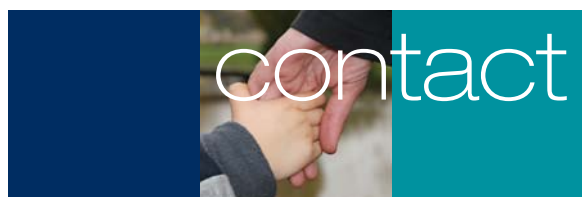
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