

Tzedakah Group: Our Giving Community

These educational opportunities help you connect with other funders and learn together about giving and our community. No solicitations at any events.

Please mark your calendar for:

Strategic Philanthropy: Charting Your Path

Monday, February 10, 2003

4:30 pm

San Diego Jewish Academy

11860 Carmel Creek Road, San Diego

A conversation with Mark Charendoff,
President, Jewish Funders Network

Understanding and Evaluating Nonprofit Financial Statements

Friday, February 21, 2003

8:30 am to 11:30 am

Qualcomm, Inc.

If you're curious about the best ways to evaluate potential grantees and promote fiscal accountability, join us at this interactive workshop led by a local CPA. This program is sponsored by San Diego Grantmakers.

Shabbat Celebration with the Students of Hillel at UCSD

Friday, April 25, 2003

6:30 pm

UCSD International Center

Come share multi-denominational services and traditional kosher Shabbat dinner with hundreds of Jewish students at UCSD.

Funding the Arts...A Jewish Value

Wednesday, June 4, 2003

12:00 Noon

Lawrence Family JCC

4126 Executive Drive, La Jolla

To confirm your attendance at any of these events, please call 858.279.2740. Feel free to invite family members or friends.

Foundation Grants Impact Our Community

Over the past five years, the Jewish Community Foundation has awarded **more than \$125 million in thousands of grants** to programs in both the Jewish and general communities. Foundation grantmaking stayed consistent over the past two years, beating the national decrease in giving of about 2.3%.



Foundation grants support programs such as Birthright Israel to send university students to Israel.

Giving trends in 2002 included:

- About **half of grants were distributed in the Jewish community** with the remainder falling under the Jewish mandate of *tikkun olam*, repairing the world.
- Distributions to **programs in Israel increased to about 13% of all grants.**
- **Education** topped the list as the area most supported by Foundation donors followed by UJF of San Diego. Other areas receiving top dollars included Health and Human Services, Arts and Culture and synagogues and churches.
- **More than \$10.8 million** was distributed to **local Jewish organizations and synagogues** for innovative programs and core operations.

Increasingly, the Foundation is called on to conduct research and provide ideas for giving. Let the Jewish Community Foundation be your resource in *tzedakah*. Your call is always welcome.

Dor L'dor Stories

Beginning this issue, we will share stories about families who pass the traditions of giving **from generation to generation.**

Recently, **Charlie Robins** and his late wife, **Mary Louise**, of blessed memory, were honored for their dedication to the Scripps Foundation. They are also generous supporters of the Jewish community, including Jewish Family Service and the Congregation Beth Israel Hunger Project. At the event, their son, **Jeremiah**, paid tribute to his parents. Here's an excerpt from his thoughtful comments:

In the case of my parents, they give to the community because they each have a clear and abiding sense, not just of their own individuality, but a sense of humanity as well, and a deep sense of their own place within, and their responsibilities to, their community as a whole. They created a sense that providing for our community was not an option, but a responsibility. It is a responsibility they have taken very seriously.

Making Your Giving Mean More

Recently, the Jewish Community Foundation participated in the first annual **San Diego Grantmakers conference**. At the event, more than a hundred foundations and individuals from the region convened to share ideas and strategies for philanthropy.

The Foundation coordinated a panel on infusing your giving with values and passion. Here are some family discussion questions that resulted from the session. They may be helpful as your own family talks about *tzedakah*.

- ♦ What did your parents and grandparents teach you about your role in the community? The world?
- ♦ Were there special circumstances or a life experience that led to your interest in helping the community through philanthropy?
- ♦ What are your basic values and how are these expressed through your giving?
- ♦ Why is supporting the community through philanthropy important to you?
- ♦ Why have you made gifts of money and time? What have been your most significant gifts and which have provided you with the most satisfaction?
- ♦ What is your vision for the community 10, 20, 50, 100 years from now?

For additional resources, please call the Foundation at 858.279.2740.

Strategies for Giving: IRAs

IRAs and other qualified retirement plans may constitute a significant portion of your estate. Did you know that these can be an ideal asset for charitable giving?

Giving Now

- Donate part or all of your required annual IRA distributions
- Receive current income tax deduction
- Offset income tax on distribution

Giving Later

- Name the JCF as beneficiary of remainder of IRA assets after your lifetime
- Avoid estate tax and income tax by your beneficiaries
- Designate to a Charitable Remainder Trust to provide income to family members

For your individual situation, your financial advisor can assist you in determining the option that is best for you. For additional information, please call the Foundation.

Welcome New Funds

Welcome and thank you to the following families and community groups who have recently established donor advised funds :

Cohen-Edelstein

*Stanley Foster Construction
Tech Academy*

Edward & Estelle Herman

*Jewish Community Camp &
Retreat Center*

Kauder Family

Gary and Lisa Levine Family

Lubin Family

Julius J. Pearl

Project HIGH

Vivien and Jeffrey Ressler

John and Cathy Weil

Two Anonymous Funds

Youth Donor Advised Funds:

Hali Lapidus

Gabrielle Scher

Memorial Funds:

Marla Bennett Memorial

Mickey Newman Memorial

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Marjory Kaplan, Executive Director

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 community in San Diego, Israel and around the world.*