

Endowment Leadership Institute Participating Organizations

Agency for Jewish Education
Congregation Adat Yeshurun
Congregation Beth Israel
Hillel of San Diego
Jewish Family Service
Lawrence Family JCC
Jacobs Family Campus
San Diego Jewish Academy
Soille Hebrew Day School
Temple Adat Shalom
Temple Solel
Tifereth Israel Synagogue
United Jewish Federation
of San Diego County

The Endowment Leadership Institute puts the principles of Create a Jewish Legacy into practice through a comprehensive three-year training program for the 12 organizations listed above. However, the Create a Jewish Legacy program recognizes all legacies left to the Jewish community.

Creating Legacies:

Individual Stories Enrich the Community

Each Passover we tell our stories to the next generation, stories of triumph, hope and community. One of the best stories is found in the Talmud where we encounter Honi planting a carob tree. Honi is asked why he is putting in so much effort when he will never see the final product. His words resonate: "As my parents planted for me before I was born, so do I plant for those who will come after me."



Legacies support important community programs

Last Passover, the Jewish Community Foundation launched the Create a Jewish Legacy/Endowment Leadership Institute program to encourage members of our community to follow Honi's example. Since then, **over 140 families** have stepped forward to tell their own stories. Here are just a few examples.

Seth Krosner's work as a trauma surgeon has taught him that one is never too young to have a will. As he prepared his, he thought carefully about providing for his loved ones. Yet he also considered the world they would inherit. "I wanted to make sure that future world provided the same resources and opportunities that I've enjoyed," said Seth. "Even more, I wanted the institutions that make my life meaningful to be stronger and more vibrant." Through bequests in his will, Seth is providing for the **Agency for Jewish Education and Tifereth Israel Synagogue**, two organizations that he sees as paramount to building a secure Jewish future.

As an active community volunteer and busy mother, **Jodie Kaplan** is concerned about current expenses including college tuition for her two teenage children. Yet, she also wanted to make a clear statement about the importance of the Jewish community in her life and the lives of her husband, **Robert** and her family. In order to accommodate all these goals, Jodie established a life insurance policy. She will pay premiums for ten years. After her life, the proceeds of the policy will establish endowment funds in the Kaplan family's name for four causes close to Jodie's heart: **Seacrest Village Retirement Communities, Hillel of San Diego, scholarships for teens first-time travel to Israel through UJF, and an organization in Israel that serves the needs of autistic children.** "Though I've always contributed to agencies locally and abroad, setting up a life insurance policy allows me to make a significant

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Legacies

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commitment to ensure that these programs will continue,” said Jodie.

Throughout their lives, **Sidney and Cynthia Wexler** have been active volunteers and members of the Jewish community. Providing for the future was an important priority for them. The Wexlers established a **charitable gift annuity** for Sidney. He will receive payments throughout his life at very attractive rates, which are significantly higher than standard CD interest rates. After his lifetime, the remainder of the annuity will be allocated to **Jewish Family Service of San Diego** to provide much-needed services to those in crisis and despair. “Establishing a gift annuity is a win-win situation. We receive income while helping those in need,” said Sidney.

John and Cathy Weil both come from families with a strong sense of Jewish community. Each passed on a compelling sense of pride in the Jewish tradition to subsequent generations. In recognition of their families’ struggles to preserve Jewish heritage and community spirit, often in difficult times, John and Cathy **designated a part of their IRA** to the Jewish community. After their lifetimes, the remainder will be awarded to the **Agency for Jewish Education, Hillel of San Diego and their donor advised fund**. This will also remove the IRA from their estate and help avoid estate taxes. “Our families instilled us with a love for the Jewish community,” noted John. “We treasure their memory and achievements.”

Book of Life: A Community Archive

Each year, those who have promised to ensure Jewish life for future generations inscribe their names—and their stories—in the Jewish community’s **Book of Life**. Through the Book of Life, many stories are told and many programs are supported. Yet all signers share at least one unifying factor: an unwavering commitment to the Jewish community and its future. We keep faith with those who came before us by leaving the resources for those who follow us.

This year’s signing ceremony will be held on **Sunday, May 22nd at 11:00 am**. Please join with us to hear many more stories of faith, caring and commitment to future generations.

Community Youth Foundation

During winter break and on Martin Luther King Day, the **Community Youth Foundation** engaged 25 eighth to tenth graders in philanthropy by empowering them with the skills to give effectively.

Students of all denominations and geographic areas engaged in text study from Judaic sources about giving, interactive exercises to identify charitable priorities and site visits to local nonprofits in both the Jewish and general communities. This culminated in an exciting and at times heart-wrenching final deliberation session where participants came together to make funding decisions. “I learned that there are many organizations, Jewish and secular that help out in the community, but need help with funding. This is how we can help out in our community,” said a participating student.

The program also paired Hillel students with the younger participants to serve as role models and mentors. “It is striking to learn first hand about how many people have so little and how much we, as students, can directly help and affect the lives of others,” said a participating Hillel student.



Programs Awarded Youth Foundation Grants

Anti-Defamation League	Becky’s House
Agency for Jewish Education	Educational Enrichment Systems
Hillel of San Diego	Friends of Scott
Inclusion at the Lawrence Family JCC	Interfaith Community Service
Sha’ar HaNegev, San Diego’s Partnership Community in Israel (through the UJF)	Monarch School
	STRIVE/Second Chance

Foundation Says Thank You at the Symphony

On Saturday evening, February 26, members of JCF committees, Estate and Tax Planning Council, Leadership Council and other friends joined the JCF Board for **An Evening at the Symphony**. The event was a special thank you for the continued involvement and efforts of JCF volunteers. The event also celebrated the special relationship between the JCF and the Symphony. Part of the Symphony endowment funds are held by the JCF, and Marjory Kaplan and Murray Galinson serve on the San Diego Symphony Foundation Board, representing the JCF.

After the concert, more than 150 guests attended a music dessert reception with Music Director Jahja Ling and Pianist Naida Cole. The law firm DLA Piper Gray Cary provided underwriting for the event. We extend our sincere appreciation to the firm, and to Ellen Whelan, a partner and a member of the JCF Estate and Tax Planning Council.



Betty Byrnes with
Music Director Jahja Ling



Irwin and Joan Jacobs with Pianist Naida Cole

Foundation News

Welcome New Funds

Blotner Family

House of Israel

Mark and Elsa Lantzman

Robert and Susan Lapidus

San Marcos Community Foundation

Steren

Sandra and Sheldon Weinstein

Anonymous (6)

New Charitable Gift Annuities

The Foundation recently received its license to issue Charitable Gift Annuities (CGA). Since receiving the license, three CGAs have been opened. CGAs let your *tzedakah* provide for you and the community. For more information, contact the Foundation at 858.279.2740.

Governance Institute

The Foundation, along with the United Jewish Federation and the University of San Diego's School of Education recently held a two-hour workshop on Board Governance for the Jewish community. Board members and senior staff were involved in workshop sessions focused on the role of boards, fiduciary responsibilities of boards and an update on SB1262.

To receive a copy of the handouts from the session, please call the Foundation.

Strategies for Giving Gifts of Real Estate

Gifts of real estate can reap both significant tax benefits and help build a vibrant community. As the strong real estate market continues in San Diego, the Foundation is seeing an increasing interest in this area.

Benefits of a Real Estate Gift:

- Receive maximum tax deduction for full market value allowed by law when you contribute property to a public charity
- May avoid capital gains tax
- Make a significant gift to the community

Types of Real Estate You Can Give:

- House or condominium
- Apartment building
- Undeveloped land
- Shopping center
- Vacation home
- Commercial or industrial building

The Foundation's Real Estate Committee, comprised of experts in the field, oversees the process. For more information, call the Foundation at 858.279.2740.

In Loving Memory Sonya Seiderman

We honor the memory of **Sonya Seiderman**. Her legacy to the Jewish Community Foundation will improve the lives of the elderly in the San Diego Jewish community, Israel and around the world. We are grateful for her vision and foresight. Her name lives on through her *tzedakah*.

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Ideas for Giving: *JCF Community Grants*

Each issue of Philanthropy Quarterly features several giving opportunities in a certain area of need. This quarter, we highlight as a two part series several programs awarded Community Grants by the JCF Grants Committee; the next issue will feature the remainder. The Committee carefully considers funding opportunities from throughout the Jewish community in San Diego and in Israel. The Community Grants Program is funded by the interest earnings of the Foundation's Jewish Community Endowment and grants from donors who want to leverage their funds with the Committee's experience and due diligence.

"Those who are occupied with the needs of the community are engaged in sacred work." —TALMUD

Annual Campaign United Jewish Federation of San Diego County

United Jewish Federation of San Diego County (JCF) 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.

Jewish Senior Services Council Initiated by UJF

Over the course of a year, Jewish Family Service, the Lawrence Family JCC, and Seacrest Village Retirement Communities together serve more than 2,000 San Diego Jewish seniors. Their needs are diverse, ranging from transportation to home-delivered meals to social, cultural and recreational programs. A newly formed Council of all the organizations involved in senior programs will work together to develop a common vision for senior services, share program information and explore ways to collaborate. In addition, the Council will advocate and explore funding opportunities for Jewish senior services in San Diego. This positive program was developed by the UJF Senior Services Committee, chaired by Herb Solomon.

Rides and Smiles Jewish Family Service

Whether it is medical appointments, grocery shopping, or visiting a spouse in a nursing home, San Diego's local Jewish seniors urgently need transportation assistance. Established a year ago, Rides and Smiles coordinates volunteer-based rides to seniors in the North County Inland area. The program has grown to provide 200 rides per month to seniors over the age of 60 who are unable to drive or use public transportation. Currently, 150 riders are registered and 45 volunteers provide rides. Although the type of ride is not limited, the majority of rides are for medical appointments.



Selah/Israel Crisis Management Center

The only countrywide volunteer network of assistance and support for new immigrants hit by sudden crisis, terror or tragedy. Selah's 700 volunteers and eight paid staff tend to individual and family needs, creating a support system and serving as advocates. The events of the Intifada have greatly increased the need for Selah services as there has been a disproportionate number of new immigrant victims. Selah services are based on the understanding that the new immigrant facing an emergency lacks the crucial resources of language, extended family, funds, social network and familiarity with the system that can help him or her through the crisis. In such cases, Selah steps in and provides the hands-on help and comfort that one family member would naturally offer another.

(over for more ideas)

Programs for Israel's Hungry

With the worsening of the economic crisis in Israel, food poverty has emerged as a major issue. Grassroots groups have now been brought together to streamline food distribution to those who need it most. According to a report commissioned by the Israeli Ministry of Health, 22% of Israeli citizens or one million people are too poor to maintain a balanced diet. Doctors throughout the country report that many of their poor patients suffer from malnutrition. This is happening as Israeli government funding to social services has been drastically reduced because of increased defense expenses.

Food Packages for the Elderly in the FSU

American Jewish Joint Distribution Committee (JDC)

On the other side of the globe, malnutrition and hunger are confronting the often-forgotten elderly Jews remaining in the Former Soviet Union. For many, food packages from the JDC are their sole source of nutrition. Most served are alone, isolated, frail and poor. All funds contributed are allocated directly to food packages, costing \$7 each.

National Day of Service for Jewish Teens Agency for Jewish Education and Youth Coalition of the Lawrence Family JCC

On April 17, 2005, Jewish teens from San Diego County will come together to participate in a community-wide service project. Together with children with special needs at the Lawrence Family JCC, teens will decorate flowerpots and then use them to plant flowers. They will continue on to the Seacrest Village Retirement Communities where they will spend time visiting with the elderly and presenting them the flowerpots they made earlier in the afternoon. The teens have been involved in leadership roles in the planning and implementation of the event which will not only help ensure success of the project but promote future involvement in civic life.

Youth Counselors Sha'ar HaNegev

Sitting directly on the border with Gaza, residents of San Diego's partnership community *Sha'ar HaNegev* in Israel have seen their lives changed dramatically. Many children no longer play outside, and teens are under much restriction. To keep them occupied in safe locations, the municipality has established an extensive program of after-school and evening activities. Eighteen youth counselors provide special tutoring, activities, mentoring and leadership to 450 children, grades seven to twelve, and 600 elementary school children.



Focus on Capital Campaigns

This new feature of *Ideas for Giving* will list capital campaigns currently in progress in the local Jewish community. If you know of a campaign that should be added, please call the Foundation.

- *Seacrest Village Retirement Communities*
- *San Diego Jewish Academy*
- *Congregation Beth El*
- *Temple Adat Shalom*
- *Temple Emanu-El*
- *Temple Solel*

Naming and dedication opportunities are available for each campaign.

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.