

Spotlight on Philanthropy

Rick and Denice Bay Fund



Rick and Denice Bay, and Rosamond Carr, founder of the Imbabazi Children's Orphanage.

Rick Bay established the Rick and Denice Bay Fund to help those less fortunate and to memorialize their family name. The Bays were married for 23 years until 2007, when Mrs. Bay was tragically killed in an automobile accident at the age of 53. In her lifetime, Mrs. Bay worked as the membership director for a number of private clubs, including the University Club atop Symphony Tower where she founded the Executive Women's Council. During her 20-year career, she was among the company's top 10 membership sales managers every year, and was nominated as the nation's "membership director of the year" three times. Rick was the Athletics Director at the University of Oregon, the Ohio State University, and the University of Minnesota, before coming to San Diego and becoming the Athletics Director at SDSU. He also served as the Chief Operating Officer for both the New York Yankees and Cleveland Indians.

Upon the death of his wife, Mr. Bay established this fund in her honor to support, among other organizations, the Imbabazi Children's Orphanage in Gisenyi, Rwanda. The fund will support causes for the general good, with a special emphasis on assisting the homeless, care of animals, and amateur sports organizations outside of the school/college community. It will serve as a reminder of Denice's kindred spirit, vivacious personality, and her bright smile.

STRATEGIC PLAN UPDATE



The data-gathering phase of the strategic plan project is in full swing. In late March, five donor think tanks were held to gather input from Foundation donors on their vision for the San Diego region and the role The Foundation might play in achieving those visions. Similarly, in mid-April, three think tank sessions were held across the region in Carlsbad, Escondido and National City to gather insight from local community members from these regions.

The committee is also in the process of conducting interviews with Working Group and Committee volunteer chairs, as well as with key opinion leaders from the community. Additionally, the team is completing analyses of regional quality-of-life indicators and The Foundation's grant making activities over the past five fiscal years. The committee's next meeting will be a retreat on May 8 to review data and prepare initial recommendations.

Exclusive Legacy League Luncheon

By remembering The Foundation in their estate plans, a special group of The San Diego Foundation's donors ensures our continued success for generations. With more than 209 legacy funds established, such as the Rick and Denice Bay Fund highlighted in this edition of *Foundation Insider*, we are currently planning a luncheon to recognize this critical group of committed people. The event will highlight the impact of a number of past estate gifts and look to the bright future of our region. If you have remembered The Foundation in your estate plan and haven't received an invitation to this exclusive event, please contact Shannon Lay at Shannon@sdfoundation.org or 619-235-2300.

While legacy funds have no current assets, the terms of the future stewardship of the estate gift are outlined at the time the fund is established. In addition to estate gifts, many donors name The Foundation as a beneficiary of a charitable trust, a pooled income fund or a gift annuity. For more information on setting up a legacy fund, please contact Adrienne Vargas at Adrienne@sdfoundation.org or 619-235-2300.

The Japanese Friendship Garden
at Balboa Park

MONDAY MAY 18, 2009
11:30 am - 1:30 pm



2009-2010 Budget Approved

The fiscal year 2009-2010 budget was approved at the April Executive Committee meeting. Despite a difficult economic time, The Foundation projects it will end this year in a positive position, thanks to carefully implemented strategies and continued, detailed management of expenses. With a 23% decrease in revenue expected for next year as the recession continues and assets decline, The Foundation will move forward with the same level of financial diligence and prudence in order to continue its stability and achieve results for the community in the upcoming year. The new fiscal year begins July 1.

An Investment Option During a Tough Economy

As the recession continues, the Charitable Giving team wants to remind donors that now is a good time to consider establishing Charitable Lead Trusts (CLTs). Through a CLT, a trust is established for a selected charitable organization to receive income for a chosen number of years. At the end of that timeframe, the principal is distributed to family members/heirs. Due to the current investment climate and low federal discount rate, 2009 may be the most optimum time to establish a CLT. Since the financial sector is experiencing an unusual decline at this time, it is possible that the portion of the assets will have a greater value at the time the CLT terminates and goes to heirs. Additionally, the federal discount rate is at its lowest in years, meaning the transfer (gift) tax to heirs will most likely also be relatively low at the close of the CLT. If you would like to see an illustration of this or talk with a charitable trust specialist who would be happy to discuss this attractive option, please contact Amy Walling at Amy@sdfoundation.org or 619-235-2300.



FOUNDATION HAPPENINGS



Fundraising Workshop Series Assists Local Nonprofits

This month, The Foundation was pleased to again launch the Certificate in Fund Raising Management (CFRM) program, a partnership with Indiana University's Center on Philanthropy Fund Raising School. Participants included nearly 30 local nonprofit representatives. The CFRM recognizes and rewards a commitment to fundraising leadership through successful completion of four key courses, including Principles and Techniques of Fundraising, Interpersonal Communication for Fundraising, Planned Giving: Getting the Proper Start, and Developing Major Gifts. This program is made possible by a grant from The Foundation's Organizational Success Program Working Group.



Fundraising Workshop Series

Below is a list of this year's participating organizations:

Aquatic Adventures
Bayside Community Center
El Cajon Community Development Corporation
Empower San Diego
Environmental Health Coalition
Interfaith Community Services
International Community Foundation
Jackie Robinson Family YMCA
Junior Achievement of San Diego

La Cuna, Inc.
La Jolla YMCA
MAAC Project
Nativity Prep Academy
New Haven Youth & Family Services
North County Humane Society & SPCA
Pro Kids Golf Academy, Inc.
San Diego Coastkeeper
San Diego Hospice Foundation
San Diego REPeritory Theatre

San Diego Youth Services
San Diego Youth Symphony and Conservatory
Shakti Rising
St. Madeleine Sophie's Center
Tariq Khamisa Foundation (TKF)
Water Conservation Garden
YMCA Youth & Family Services
Young Audiences of San Diego

Local Arts & Culture Organizations Benefit from Traveling Symposium

Nearly 100 leaders representing local arts and culture organizations gathered together late last month to discuss their survival in the economic recession. The event featured the arrival of the traveling symposium *Arts in Crisis: A Kennedy Center Initiative*, designed to provide emergency planning assistance to struggling arts and culture organizations throughout the United States. The symposium, facilitated by Kennedy Center President Michael M. Kaiser and members of his executive staff, helped local performing arts managers and their volunteers put the recession in perspective, providing helpful tips for sustaining nonprofit arts and culture organizations in the midst of economic turmoil.



Michael Kaiser, CEO John F Kennedy Center for the Performing Arts, and Christopher Beach, President and Artistic Director, La Jolla Music Society

The diverse audience included such groups as the San Diego Symphony, La Jolla Music Society and the North Coast Repertory Theatre. The San Diego Performing Arts League partnered with the John F. Kennedy Center for the Performing Arts to bring the initiative to San Diego. The initiative is funded by Adrienne Arsht and Helen Lee Henderson with local support from The San Diego Foundation and the City of San Diego Commission for Arts and Culture. For more information regarding Arts in Crisis visit www.artsincrisis.org.

Convening in Carlsbad Continues Regional Vision Discussions



Joe Sterling, President & CEO Sterling Insights, Elizabeth "Boo" Thomas, President & CEO of the Center for Planning Excellence (C-PEX), and Jack Raymond, Chair of The San Diego Foundation Board of Governors

On April 23, The San Diego Foundation convened a wide range of business and civic leaders, local philanthropists, and community members at the Carlsbad City Library for its third "Let's Imagine" event, continuing its exploration of the feasibility of a Regional Vision Initiative. The convening was hosted by the Carlsbad Charitable Foundation and featured Elizabeth "Boo" Thomas, President & CEO of the Center for Planning Excellence (C-PEX). C-PEX began as an initiative of the Baton Rouge Area Foundation and is now responsible for managing the award-winning regional visioning effort known as Louisiana Speaks: Our Voice, Our Plan, Our Future.

Under Ms. Thomas' leadership, C-PEX orchestrated an unprecedented public outreach effort that engaged more than 27,000 Louisianans in envisioning the future of their state in the aftermath of Hurricanes Katrina and Rita. Opening remarks were delivered by Jack Raymond, Chair of the Board of Governors, and Yvonne Murchison Finocchiaro, Chair-Elect of the Carlsbad Charitable Foundation. Additional speakers included Jerry Hoffmeister, Vice Chair of the Board of Governors; Jennifer Adams-Brooks, Secretary of the Board of Governors and Vice Chair of the Civil Society Working Group; Bill Geppert, member of the Board of Governors and Chair of its newly established Regional Vision Group; and Ted Owen, President & CEO of the Carlsbad Chamber of Commerce.

Grant Awarded to Continue Momentum on Climate Change

The San Diego Foundation recently awarded a grant to ICLEI Cities for Climate Protection to support its work with San Diego's local governments and public agencies. These efforts include strategies to reduce both greenhouse gas emissions and local vulnerabilities to climate change. ICLEI will provide trainings and technical experts to local cities so that they can assess their carbon footprints and identify ways to best reduce emissions. The program will continue into the fall and winter with a focus on climate protection planning. ICLEI will also facilitate the development of the San Diego Regional Climate Protection Network, which will meet quarterly to share best practices, resources, and other information on climate related policies and programs in order to initiate on-the-ground climate action.

REGIONAL OUTREACH UPDATES

The Foundation's North County Inland office has recently moved.
The new location is 16870 West Bernardo Drive, San Diego 92127.
Our new phone number is 858-674-6979, ext 6733.

Escondido

Escondido Mayor Lori Holt Pfeiler and members of the Escondido City Council will serve as celebrity servers at an intimate gathering at the home of Margaret Moir. Guests will gather to learn more about the benefits of membership in the Escondido Charitable Foundation. Foundation members will be present to celebrate current successes, which include establishment of a local endowment and grant making to several local nonprofits. Mark your calendar for May 17, from 3-5pm and learn more about how local residents are raising local dollars for vital local causes. Please RSVP your attendance to Trudy Armstrong at Trudy@sdfoundation.org or call 858-385-1595

Rancho Bernardo

Also in Rancho Bernardo, The Board recently had the privilege of working with Ken Blanchard, author of "The One Minute Manager". The group focused on developing a vision and strategy for the future of The Rancho Bernardo Community Foundation.



Hollyce Phillips, Carlsbad Charitable Foundation Board Chair; Carol Van Vooren, BizTown Principal; and BizTown participants Adrian Retzer and Victor Diaz-Lafferty.

Carlsbad

Last month, more than 80 people gathered for the Carlsbad Charitable Foundation's Spring Social, held at the Barn at the Flower Fields. The theme of "growth" was used throughout the event, including references made by Chair Knox Williams to newly acquired contributions such as the Leichtag Family Foundation's \$25,000 matching grant, and the foundation's goal to increase its membership base. Last year's grant recipients were also invited to the stage to share their experiences and successes with the audience.

Oceanside

Save the date! Join the Oceanside Charitable Foundation on Wednesday, May 27, from 5-7pm at the El Camino Country Club, as the proud members celebrate the first Annual Grants Celebration! Learn how local Oceanside residents have raised local dollars to support nonprofit organizations that focus on youth and parenting programs in Oceanside. Help make a difference in Oceanside, join the celebration and learn more about the Oceanside Charitable Foundation. To RSVP please contact John Duca at John@sdfoundation.org or 760-269-3882.



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