

The Foundation Insider

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SPOTLIGHT ON PHILANTHROPY

Rufus and Mary DeWitt Endowment Fund



Rufus and Mary DeWitt

The family of Rufus and Mary DeWitt established a fund in their parent's name to honor their legacy of community service. The fund supports development and education for disadvantaged youth in southeast San Diego. Rufus was a very dynamic person who was always a fighter for the underprivileged, helping people whenever and wherever he could. As the first black executive director of a San Diego County YMCA, he was an exemplary role model who left the community in better condition than he found it.

Rufus was a founder of the Elementary Institute of Science and the Southeast Community Theatre now known as Common Ground Theatre. Later he became an administrator with the San Diego Community College District. Mary was an educator who taught more than 40 years in San Diego, Alabama and Tennessee. She has also been very actively involved in the community for many years and was a major force behind the Martin Luther King Jr. Pageant and Parade. Mary is a founding member of Women, Inc. and was responsible for bringing the Breakfast for M'Lady fundraiser to the San Diego Alumnae chapter of Delta Sigma Theta Sorority, Inc.

We invite you to consider how you might honor your loved ones by establishing a fund in their name at The San Diego Foundation. For more information please contact the Charitable Giving Team at givingteam@sdfoundation.org or 619-235-2300.

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Congratulations to Our New Officers and Board Members!

The San Diego Foundation extends its congratulations to the newly elected officers to the Board of Governors!



Chair – Jerry Hoffmeister

After managing and expanding several global technology companies until his retirement in 1997, Jerry currently provides strategic support and mentoring to early stage technology companies and community nonprofit organizations. His dedication and active leadership at The Foundation includes his current role as vice chair and his service on the Board Governance committee, Organizational Success Program Working Group, chair of the Science and Technology Working Group, and vice chair of the North County Coastal Civic Alliance.



Vice Chair – Jennifer Adams-Brooks

With over 20 years of experience in corporate communications, public affairs, training, legislative activities and strategic planning, Jennifer brings quality leadership to The Foundation in her current role as secretary, as well as vice chair of the Civil Society Working Group and member of the Board Governance and Public Policy committees. She is currently president of Clark Consultants, a firm she established in 2000 that specializes in human resource consulting and executive coaching.



Treasurer – Doug Hegebarth

With over 30 years of business and technology leadership in San Diego, Doug brings a wealth of experience and energy to The Foundation. Beginning with a successful 18-year career at SAIC, he has continued building his expertise by creating, operating, and rescuing a number of Internet and software companies. In addition, Doug provides strategic consulting and mentoring to emerging technology companies throughout San Diego. Doug is currently chair of the Organizational Success Program Working Group as well as a member of the Strategic Planning committee.



Secretary – Steve Smith

Guided by a deep belief in the importance of civic engagement, Steven joined The Foundation’s Civil Society Working Group in 2001 and has served as chair since 2004. Steven was appointed Dean of California Western Law School in 1996, following eight years as Dean of Cleveland-Marshall Law School. He is former deputy director and remains active in the Association of American Law Schools and in the American Bar Association, as a member of the Council, and is the past chair of the Section of Legal Education and Admissions to the Bar.

The Foundation’s Board of Governors also welcomes its newest members, elected at the May board meeting: Paul Eichen, Connie Matsui, Garry Ridge and Nancy Spector. Look for more information on our newest members in upcoming issues of *Foundation Insider*.



Thank you!

A heartfelt thank you to Jack Raymond, who is stepping down as Board Chair after two years of incredible leadership and dedication. On behalf of the entire staff and volunteers of The Foundation, we thank you for your service.

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A Research Report

**Our Region’s Future Funding:
The Transfer of Wealth in San Diego County
Over the Next 25 Years**








Transfer of Wealth Study Indicates Half a Billion Dollars May Be Coming to San Diego

During this challenging economic time, The San Diego Foundation is pleased to provide positive news through the release of *The Transfer Wealth Study: A 25 Year Analysis of Future Giving in San Diego*. According to the study, the transfer of wealth opportunity in San Diego is not just real...it’s substantial. Working with conservative projections, the study makes the case that the county’s transfer of wealth could be as much as \$200 billion over the next 25 years, creating as much as \$500 million for the greater San Diego region as dollars are passed from one generation to the next, with \$500 million additional dollars available every year thereafter. The study was conducted by the RUPRI Center for Rural Entrepreneurship.

Perhaps now is the time to look past the current recession, and out to the future. Perhaps now is the time to ask the question... *what if?* What if the transfer of wealth was \$200 billion over the next 25 years, creating \$500 million for San Diego? We believe everyone should be informed and think about the impact of this study on San Diego. We invite you to read the newly released report and find renewed hope for San Diego’s future.

To read the *Transfer of Wealth Study*, [click here](#).

For information on the methodology of the study, [click here](#).

The time to plan for San Diego’s future is now. [Click here](#) for five things you can do to get started! To contact The San Diego Foundation and begin to make a difference for San Diego, [click here](#).

For media coverage on the *Transfer of Wealth Study*, please see [Communications Corner](#).

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STRATEGIC PLAN UPDATE

The Strategic Planning Committee, plus staff members Adrienne Vargas and Dan Beintema and volunteer Christie Haigh, met for the full day on Friday, May 8 to assimilate the extensive collection of data, feedback and research assembled over the past three months and develop draft recommendations for the strategic plan. All agreed that the information gathered from key opinion leaders, volunteers, staff and the community at large

was rich with insight and implications for The Foundation.

The explorations and discussions concluded that The San Diego Foundation has the enormous opportunity-- and, in light of the current times, the economic necessity-- to focus its energies and leverage its reputation, financial capital and human capital to bring even greater value to donors and the greater San Diego region. Broad goals as well as specific objectives and strategies were identified. A first draft of the strategic plan will be completed by Paul Harder this month, reviewed by the full Strategic Planning Committee, then piloted at an Executive Leadership Team meeting prior to presentation to the Board at the June retreat.



Exclusive Legacy League Luncheon



Allan and Glenda Koljonen. Also, Glenda won one of the memberships to the Japanese Friendship Garden

This month, The San Diego Foundation hosted more than 100 members of our Legacy League at an exclusive luncheon at the Japanese Friendship Garden. Those in attendance have a future promised gift to The Foundation. During the event, we honored the memory of Lilyan and Tom Frank, who remembered The San Diego Foundation in their estate plan, and whose gift we received this year. The gift established two endowment funds; the first to support the Japanese Friendship Garden and the second to support the rose and cactus garden in Balboa Park. During the luncheon, Randy Neely, Lilyan and Tom's nephew, introduced guests to his aunt and uncle and shared how the couple enjoyed the gardens in the park, which is what led them to consider the park as a beneficiary of their estate. We gratefully acknowledge all of those who have done the same.

For more information on setting up a legacy fund, please contact our Charitable Giving Team at givingteam@sdfoundation.org or 619-235-2300.



FOUNDATION HAPPENINGS

Grant Making Approved by Board of Governors

Several local organizations will receive critical funds, now that the Board has approved the first round of this year's discretionary grants. The grants were approved after Board members received a list of proposed organizations for grant approval, along with recommended grant amounts, for several Foundation focus areas. The docket was prepared after working groups and staff members spent extensive time and effort reviewing grant proposals, attending site visits and coming to agreement on the most appropriate organizations to recommend for funding.

In this docket, the board approved a total of 23 grants, equaling \$1,174,774, for local organizations and institutions. Grants will go out across several areas, including the environment, providing funding to organizations through the *Clean Environments*, *Health Communities Initiative*, the *Land and Watershed Initiative* and the *Environmental Blasker Grants*. Funding will also be provided through the *Science & Technology Blasker Grant Program* and the *Health & Human Services Community Grant Program*.



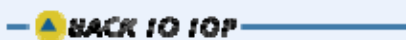
Hundreds of Students Receive Assistance Through the Community Scholarship Program

After receiving a record-breaking number of applications, The San Diego Foundation is pleased to announce that approximately \$1.5 million in scholarships will be awarded to students for the upcoming academic year. Of the over 600 scholarship recipients, 250 were renewed from previous years.

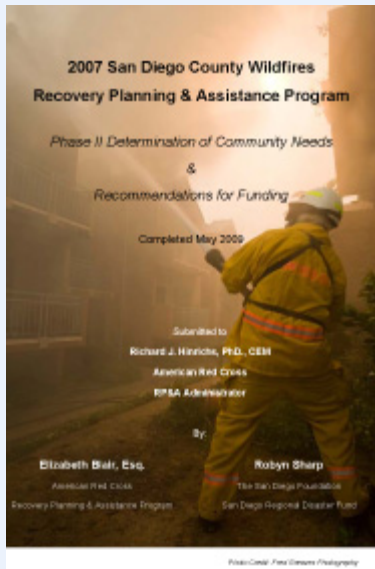
It is only through generous donors that The Foundation can provide the educational assistance so critical to San Diego and its future. The Foundation takes great pride in the successes that will be possible through this program, and is grateful to those who contributed their resources and time despite a challenging economic climate. Donors will have the opportunity to meet their scholarship recipients through a series of luncheons in July.



As the economy slowly recovers over the next year, The Foundation expects a continued increase in the need for assistance. We accept donations and establish scholarship funds all year long. To contribute to this outstanding program, please contact Arzo Mansury at Arzo@sdfoundation.org or 619-235-2300.



The San Diego Regional Disaster Fund partners with the National American Red Cross for Grant Making Assistance



The San Diego Regional Disaster Fund Board has approved a partnership with the National American Red Cross' (N-ARC) Recovery Planning & Assistance Program (RP&A) to advise and assist the organization with grant making activities related to disaster preparation and hazard mitigation. The Foundation will help determine community needs and desired outcomes for the San Diego County communities affected by the 2007 wildfires, and will advise N-ARC on their grant making process. This grant making phase of N-ARC's RP&A program will provide grants totaling between \$1-\$1.5 million to San Diego County's local governments and nonprofit organizations to better prepare our communities for a future wildfire threat.

As the N-ARC plans to end operations and withdraw from San Diego by February 2010, it has also requested assistance from The Foundation with the management and oversight of funded projects.

For more information on the Regional Disaster Fund, contact Robyn Sharp at Robyn@sdfoundation.org or 619-235-2300.

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Ten Local Cities Receive Assistance with Climate Change Efforts

The Foundation continues to support initiatives geared toward reducing greenhouse gas emissions and enhancing resiliency to a changing climate in San Diego. As a result of a grant awarded to Cities for Climate Protection (ICLEI) for its work with local cities and public agencies, ten local governments will now have some additional assistance in their climate change efforts this summer. Carlsbad, Encinitas, Imperial Beach, La Mesa, National City, Poway, San Diego County, San Marcos, Solana Beach, and Vista will all be partnered with climate fellows to provide resources and advance their work throughout the next several months. ICLEI has also hired a program officer to assist in the initiative.

In addition to its work with local agencies, ICLEI also facilitates the San Diego Regional Climate Protection Network, which meets quarterly to share best practices, resources, and other information on climate-related policies and programs in order to initiate on-the-ground climate action.

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Women's Foundation Celebrates Newest Grant Recipients!



The San Diego Women's Foundation is very pleased to announce its newest community partners in Economic and Employment Development:

- Alliance for African Assistance
- East County EDC Foundation
- Home Start, Inc.
- International Rescue Committee

Representatives from these groups will gather at our 9th Annual Grants Celebration on the evening of June 2. Please join us as we congratulate them and celebrate the difference that is made when strong, committed women in philanthropy come together with outstanding nonprofits in the San Diego region.

To RSVP for the celebration, please contact Ciera Rudin at Ciera@sdfoundation.org or 619-235-2300.

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Regional Outreach Updates

Presentation of Focus 2050 Climate Change Study hosted by the North County Civic Alliances

The North County Inland and Coastal Civic Alliances will host a presentation on the Focus 2050 Study. The Focus 2050 Study is the first comprehensive, regional assessment of climate impacts undertaken for any county in California.

San Diegans have a long and rich history of local community pride and protection of our region's clean air and water, natural lands and quality of life. At the same time our region faces challenges, like all others throughout the world, from climate change. To help understand these challenges Dr. Emily Young, senior director of Environment Analysis and Strategy at The Foundation, will provide an overview of the report's findings and share what local communities can do to help commit our region to a more sustainable path of economic growth and a preserved way of life in San Diego.

The presentation will take place on June 4, beginning at 8:30 a.m. (continental breakfast and registration begin at 7:45 a.m.) in the Markstein Hall on the campus of Cal State San Marcos. If you are interested in attending, please RSVP at Kerry@sdfoundation.org.

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The 4S Ranch~Del Sur Community Foundation

The 4S Ranch~Del Sur Community Foundation will enter its second year of grant making on June 5th, when the Foundation will announce \$8,500 in grants. The proposals included an Accelerated Math Program at Stone Ranch Elementary School; the Compass Learning program for Del Sur Elementary School; and funds for community outreach projects for the Oak Valley Music Boosters.

The Foundation is excited to be inspiring collaboration in the community in an effort to maximize the impact of the Foundation grants. One such proposal came from Del Sur Elementary School, which collaborated with Monterey Ridge Elementary School. Since Monterey Ridge has unlimited access to Compass Learning, their leadership decided to assist Del Sur Elementary School obtain licenses that would then be matched by Compass Learning, thereby creating the opportunity to leverage a grant from the 4S Ranch ~ Del Sur Community Foundation to have a much greater impact.

The community is invited to the Grants Celebration on June 5th at Zocalo Restaurant in 4S Ranch, during which the grant recipients will be announced. This event is free of charge. Members and their guests will also have the opportunity to meet Greg Mizell, the new principal at Del Norte High School and can sign up for a personal "backstage" tour of Del Norte High.

Please join members of the 4S Ranch~Del Sur Community Foundation, Friday, June 5th at 5:30 pm at Zocalo Restaurant . For more information, please contact North County Inland Manager, Trudy Armstrong at trudy@sdfoundation.org.

Escondido Charitable Foundation

The Escondido Charitable Foundation gathered for a beautiful spring afternoon event on Sunday, May 17th from 3 pm to 5 pm at the Historic Escondido home of Dr. Douglas and Margaret Moir. Escondido Mayor, Lori Holt Pfeiler and members of the Escondido City Council were wonderful sports about spending the afternoon serving tray after tray of hors d'oeuvres to the members and their guests.



Escondido mayor, Lori Holt Pfeiler thanks members of Escondido Charitable Foundation for the difference they make in the community, while ECF chair, Linda Bailey prepares her remarks to the group.

The Rancho Bernardo Community Foundation

The Rancho Bernardo Community Foundation will celebrate donors with plaques on the Pathway of Pride at Webb Park on June 9th. The Pathway of Pride, located on a walkway around the lake in Webb Park in Rancho Bernardo, is marked with 175 plaques honoring donors since 1993. The contributions of those donors mean that every year the Foundation can offer grants to community organizations. Each Pathway of Pride donation is added to the Foundation's endowment fund that assures the future of the Rancho Bernardo community, while highlighting the donor through permanent recognition.

Oceanside Charitable Foundation 2009 Grant Awards Celebration



North County Lifeline receiving grant award from the Oceanside Charitable Foundation
Photo (l-r): Jack Raymond, Thomas Nunan, Don Stump, Betty Graf, Reginald Owens, Colleen O'Harra.

On Wednesday, May 27, The Oceanside Charitable Foundation hosted its first grant celebration highlighting two local non-profits whose programs focus on empowering youth. Over 75 members and guests were in attendance at the El Camino Country Club to present a total of \$30k in awards to the YMCA's Oceanside Street Outreach Program and to the North County Lifeline's Oceanside Civic Leadership Project. Board chairs, Tom Nunan and Colleen O'Harra presided over the event and reminded the membership and guests of the growth of the Oceanside Charitable Foundation since its inception in the Winter of 2007. Members were encouraged to invite others to become members so that the grant making impact in the community will continue to grow.

If you would like to learn more about the Oceanside Charitable Foundation, please contact John Duca at John@sdfoundation.org or 760-269-3882.



Communications Corner

The release of the *Transfer of Wealth Study* has generate media interest throughout the region, including the [San Diego Business Journal](#), [The Daily Transcript](#) and the [North County Times](#).

Thank you for your continued support of The San Diego Foundation!

A handwritten signature in black ink, appearing to read "Bob Kelly".

Bob Kelly, President & CEO
The San Diego Foundation

A handwritten signature in black ink, appearing to read "Jack Raymond".

Jack Raymond, Board Chair
The San Diego Foundation

If you have questions or would like to provide feedback on this email, please send them to deirdre@sdfoundation.org