

# The San Diego Foundation

## Chair's and President's Report

A Report to the Community

A Report from:  
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### Donors Support San Diego's Educational Needs

Many of our donors place a high priority on supporting education. This is evident in the large number of grants we are able to make each year for this purpose. Educational grantmaking represented the largest percentage of our total grantmaking last year, 17%, over \$5.9 million. These grants support schools, social service organizations, museums, higher education, and parental involvement programs, and help to ensure that quality educational opportunities will be available to more children in San Diego.



*J. Dallas and Mary H. Clark*

*J. Dallas and Mary H. Clark Fund, 1986*

*J. Dallas and Mary H. Clark Endowment Fund, 1996*

The history of The Foundation very much parallels the philanthropic activities of Dallas and Mary Clark. Both have served on the Board of Governors, with Mr. Clark being a past President for several years, and on many committees. "We've been involved with The Foundation since its infancy," he explains.



Both of the Clark's funds are aimed at bettering the lives of San Diegans, and education is an important component of their grantmaking. They have supported Musicians for Education, San Diego Council on Literacy, and a number of local schools and universities. They have granted to Museum Trustee Association for their education program, and Spreckels Organ Society to sponsor their Educational Outreach Program for 5th graders. The Clark's met during World War II and have been married for more than 50 years. We sincerely thank Dallas and Mary for all they have done for The San Diego Foundation and the community.

*Ronald and Jo Moss*

*Ronald and Joan Moss Fund*

Jo and Ron Moss have a continuing interest in education with a primary focus on women and girls. Throughout her lifetime Jo has been involved with girls' issues. She has always given significant volunteer time and support to organizations that promote these same interests, such as American Association of University Women and their Tech Trek program, a residential camp for middle school girls at UCSD, Girl Scouts, Vista Community Clinic with health promotion and outreach programs, and teenage pregnancy prevention programs. The couple has made a number of grants to support scholarship and continuing education programs at several local colleges and universities. They also have made grants to Preuss School, Elementary Institute of Science, and Academic Connections at UCSD.



### Results Matter!

In the past, most donors and foundations made their grants based on belief, on faith that the organization would carry out its stated goals. However, recent events have led to an increased sense of caution and higher expectations as to the results of grants. The Foundation is leading the way in responding to these concerns. Our mantra is, "Results Matter!" We're looking for more effective uses of charitable dollars and clearly defined, measurable outcomes and goals.

To this end, our staff and volunteers have undergone a series of trainings with the Rensselaerville Institute to begin shifting our thinking from "funder" to "investor." In the coming months, fund advisors will also be offered the opportunity to learn strategies for receiving a measurable return on their investments. Nonprofit organizations will be able to adapt to this new model through intensive workshops and technical assistance sessions. We are confident that donors, nonprofits, and the entire community will benefit from this new results-oriented approach.

## Highlights from the Board and Executive Committee Meetings

- The Board approved 16 new funds.
- The Board reviewed and approved grant recommendations from July 1 - September 11. Total grantmaking was over \$6.9 million, a total of 518 grants.
- The Board was informed that grants for the year will be around \$40 million.
- The Board discussed the Organizational Success Program that is underway and The Foundation's efforts to raise \$10 million to support this program.
- The Board discussed the Arts and Culture working group that is underway, and that Dr. Roger Cornell will chair that group. A job description has been written and the search for a Director is forthcoming.

## New Endowment Funds at The Foundation

Endowment funds are permanent funds that distribute grants only from the earnings of the principal amount. The principal remains untouched and thus the fund lasts forever. We commend Pathfinders for making this long-term investment in their organization's future.

### *Pathfinders of San Diego, Inc*

#### *Pathfinders of San Diego, Inc. Fund, 2001*

Pathfinders of San Diego is the state's oldest recovery home for alcoholics and a nationally recognized leader in what is known as "social-model recovery." Founded in 1950 as a storefront operation in downtown, today it operates a recovery home with three houses for male alcoholics in Golden Hill.

Pathfinders is dedicated to helping its residents achieve lasting sobriety with a minimum amount of public funds. A pioneer in social-model recovery, its program relies on self-motivation and peer support rather than medical treatment; it is strongly rooted in the principles of Alcoholics Anonymous.

Pathfinders also operates Shelter Plus Care, which helps homeless men with both alcohol abuse and mental health problems to become functioning members of society again. In 2002, Pathfinders became one of the first

providers for the city's Serial Inebriate Program, an innovative project designed by the San Diego Police Department to help persons repeatedly arrested for public drunkenness. To date, SIP is estimated to have saved the city nearly \$1 million in costs associated with police and medical-response personnel.

## There's Still Time Before Year-End!

The end of the year is an ideal time to become a philanthropist. If you open your fund on or before December 31 you will still be able to claim the maximum tax benefits yet this year. Call 619-235-2300 and ask to speak with a philanthropic advisor to learn about your options.

## Professional Advisor Forums

The Foundation is holding informational breakfasts and luncheons for attorneys and CPA's in select locations throughout San Diego County. These meetings will provide opportunities for professional advisors to learn about year-end tax planning strategies and network with other professionals who practice in their area. Sample dates and locations are:

- 11/11 at noon at Carver's in Escondido
- 11/12 at 7:30 a.m. at the University Club atop Symphony Towers
- 11/14 at 7:30 a.m. at San Diego Marriott - Del Mar, Arterra Restaurant

Please call Ann Miller at 619-814-1323 if you are interested in attending one of the above forums or you would like additional information about other options. Invest the time to learn about how you as a professional advisor can partner with The San Diego Foundation to meet your clients' charitable and tax planning goals.

## Consider Gifts of Real Estate

A donation of real estate allows you to achieve your charitable goals and provides you with the maximum benefits allowed by law. You can learn more by calling 619-235-2300 or visiting the real estate section of our website: [www.sdfoundation.org/charitablerealestate](http://www.sdfoundation.org/charitablerealestate).

The San Diego Foundation's purpose is to improve the quality of life in all of our communities by promoting and increasing responsible and effective philanthropy.

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