

2016 Annual Report



Mobilizing resources to advance a vibrant **quality of life**, maximize the **impact of your** social investment and champion **civic engagement**.

The history of The San Diego Foundation is rooted in the collaborative action of thousands of caring individuals and committed organizations. For 41 years, we have worked side by side with donors, community leaders, local government, businesses and many others to facilitate positive social change for the entire region.

Each year, we share the outcome from community engagement and generosity with the release of our annual report. The data included gives our donors and the general public an opportunity to dive deeper into the growth and impact of regional philanthropy through The San Diego Foundation. Fiscal Year 2016 will be remembered as the most generous year of grant making in our 41-year history.

Beyond serving as a barometer for charitable giving in San Diego, our annual report also reminds us that it's important to reflect, renew and celebrate philanthropy's role in the region.

Philanthropy is more than just money. It's the shared desire and effort to help reach our full potential as a community and to improve quality of life for all. Every day, we witness firsthand what is possible when engaged donors and leaders come together to tackle and solve some of our greatest challenges.

San Diego grows more vibrant every year thanks to partnerships that are built, respect that is shared and giving that is inspired and selfless.

As you review our Fiscal Year 2016 Annual Report and learn more about The San Diego Foundation, we urge you to take a moment to read the individual stories of impact from the past year. These stories provide a glimpse into the immense opportunity philanthropy creates within our region.

Sincerely,



A handwritten signature in black ink, appearing to read 'B. Kathlyn Mead'.

B. Kathlyn Mead
President & CEO



A handwritten signature in black ink, appearing to read 'Connie Matsui'.

Connie Matsui
Chair, Board of Governors

Grants We Awarded

2016

\$58,575,000

2014

\$50,669,000

2015

\$48,129,000



In FY 2016, The San Diego Foundation made history by granting more than ever before to the nonprofit community. A record \$58.5 million was awarded with 5,650 grants to 1,666 nonprofit organizations supporting our regional needs.

Where Grants Do Good

*as of June 30, 2016



37.3%

Education

\$21,823,245

Educational Services	\$446,448
Fund Raising & Fund Distribution	\$692,210
Higher Education	\$3,992,926
Libraries	\$10,224,470
Other Education	\$821,993
Pre-K Through High School	\$1,651,877
Scholarships & Student Financial Aid	\$3,531,477
Single Organization Support	\$349,689
Student Services	\$112,155



16.1%

Health & Human Services

\$9,404,673

Crime & Legal-Related	\$320,044
Diseases, Disorders & Medical Disciplines	\$755,728
Employment	\$141,408
Food, Agriculture & Nutrition	\$223,048
Health Care	\$2,791,507
Housing & Shelter	\$152,723
Human Services	\$3,504,714
Medical Research	\$332,416
Mental Health & Crisis Intervention	\$581,273
Public Safety, Disaster Preparedness & Relief	\$276,049
Recreation & Sports	\$320,473
Social Science	\$5,290



13.2%

Civil Society

\$7,719,430

Civil Rights, Social Action & Advocacy	\$94,833
Community Improvement & Capacity Building	\$481,650
Philanthropy, Voluntarism & Grantmaking Foundations	\$4,910,273
Public & Societal Benefit	\$1,615,823
Science & Technology	\$616,851

Where Grants Do Good

*as of June 30, 2016



11.8%

Arts & Culture \$6,902,169

Arts Education	\$142,573
Dance	\$99,480
Media & Communications	\$616,576
Museums	\$1,737,819
Music	\$508,867
Opera	\$296,316
Other Arts & Culture	\$1,331,085
Symphony Orchestras	\$1,286,294
Theater	\$883,159



8.1%

Youth Development \$4,769,456

Big Brothers & Big Sisters	\$76,490
Organizational Support	\$21,101
Other Youth Development	\$50,846
Scouts Organizations	\$295,555
Youth Centers & Clubs	\$820,439
Youth Community Service	\$405,350
Youth Development Programs	\$3,062,775
Youth Leadership	\$36,900



6.5%

Environment \$3,819,937

Alliances & Advocacy	\$161,750
Animal-Related	\$33,969
Botanical Gardens & Arboreta	\$81,917
Environmental Beautification	\$10,004
Environmental Education	\$241,004
Forest Conservation	\$71,500
Land Resources Conservation	\$423,698
Natural Resources Conservation & Protection	\$596,873
Other Environment	\$1,506,300
Research Institutes & Public Policy Analysis	\$1,750
Water Resources, Wetlands Conservation & Management	\$691,172

Other grantmaking totaling \$4,136,366 includes international, foreign affair & national security; mutual & membership benefit, and religion-related grants.

Stories of Impact



Growing San Diego's Creative Economy

Philanthropist **Jill Hall** knows firsthand the impact arts can have on a child's growth and development. As a former inner city school teacher, Jill used the arts to help teach students. Today, Jill has contributed to and chairs the The San Diego Foundation Creative Catalyst Program to help increase charitable investments in San Diego's creative economy. Thanks to her generous lead gift, and the co-investment by other donors, the Creative Catalyst program has provided opportunities for 35 local professional artists who have increased regional civic engagement by reaching more than 170,000 community members.



Getting Underserved Communities Outdoors

San Diego is a region rich with green space, but many low-income, ethnically diverse communities have limited access to parks and nature. **San Diego Canyonlands** is one organization working to change that. Thanks to a grant from The San Diego Foundation Opening the Outdoors Program, the organization is building a trail network for residents of City Heights that will allow more families and youth to explore the outdoors and have a safe, accessible way to travel.



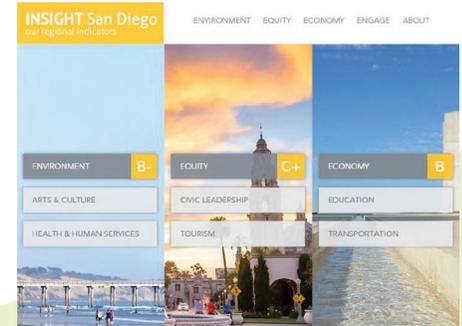
Young Philanthropists Hold Key to San Diego's Future

The idea that "leadership comes in all shapes and sizes" was put to the test during The San Diego Foundation Center for Civic Engagement Future40 Event Series in 2015-2016. Engaging with more than 1,500 individuals from 77 different zip codes, the event series brought together some of the region's brightest and most innovative leaders. At *25 and Under! The Future of Philanthropy*, youth leaders, including **Nate Howard**, founder of MovementBE, and **Winnie Xu**, co-founder of Giventure, spoke about the programs they've created to empower a culture of civic engagement and philanthropy among their millennial peers.

Stories of Impact

New Tool Measures Local Environment, Equity and Economy

In order to plan for the future, we must take record of where we are now and how we've progressed. **INSIGHT San Diego**, created in partnership with The San Diego Regional Economic Development Corporation, Equinox Center, the Center on Policy Initiatives and Posiba, is a web-based, data-driven tool of regional indicators that measures progress on advancing quality of life and the priorities identified in *Our Greater San Diego Vision* report.



Helping Students Pursue Their Academic Dreams

Growing up in Barrio Logan, a neighborhood where less than three in ten residents 25 and older have a high school diploma, **Francisco "Panchito" Martinez** was not afforded the best opportunities and resources as a child. However, those obstacles didn't affect his drive to succeed. Thanks to the Barrio Logan College Institute and support from The San Diego Foundation Community Scholarship Program, Panchito is now pursuing his higher education goals as a student at San Diego State University.



Leaving a Legacy for STEM and Science Innovation

San Diego aeronautical engineer **Samuel L. Blasker** believed in the value of philanthropy to support scientific innovation. Before his passing, he established the Blasker-Rose-Miah Endowment Fund at The San Diego Foundation to provide an opportunity for San Diego's leading experts and future scientists to address the region's most pressing challenges. Today, the Fund has granted more than \$7.3 million to support the region's economy and tech innovation, including a grant to the Life Sciences Summer Institute, a summer program funded by the San Diego Workforce Partnership that nourishes a passion for science and math in San Diego's next generation of scientists.



Stories of Impact



Regional Affiliates Celebrate Decade of Local Giving

2016 marked the 10-year anniversary of The San Diego Foundation **Regional Affiliate Program**, which enables San Diegans in individual communities to invest their time, talent and treasure to strengthen the quality of life in their local neighborhood. In the past decade, more than 743 individuals and 63 corporate members have built an endowment of more than \$3.8 million and contributed \$3.4 million back to San Diego's communities, from Carlsbad down to Chula Vista.



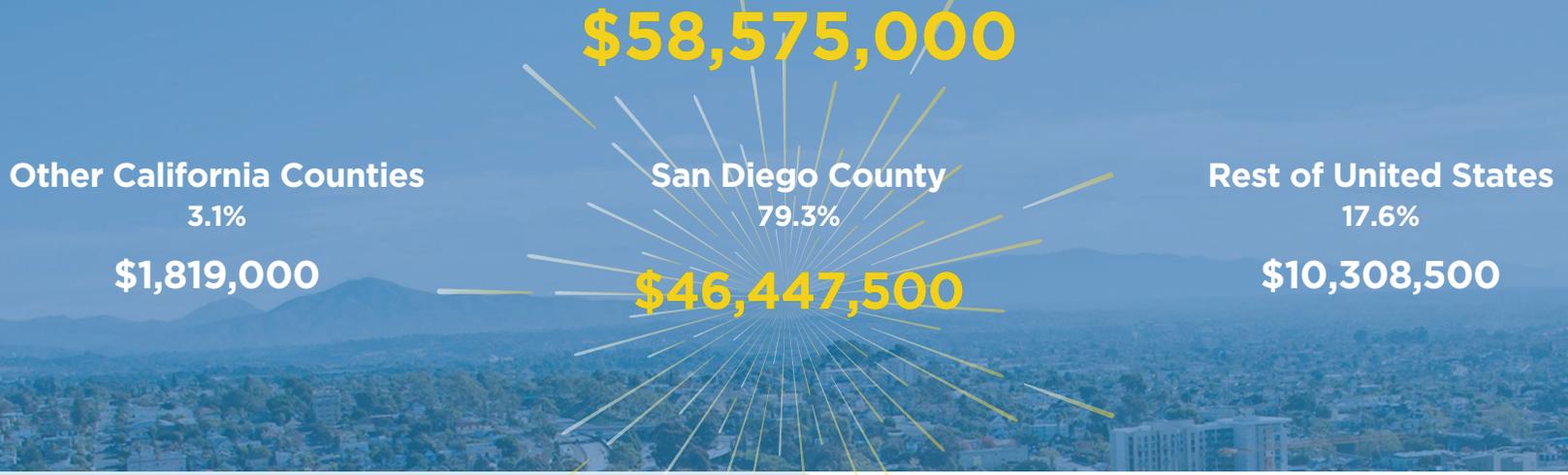
Donors Fund the Future of San Diego

The San Diego Foundation **Fund for the Future Endowment** was created to lead our region into the future. With it, we can all help our local communities prepare and respond to future challenges as well as facilitate opportunity. Today, the endowment is supported by leaders like **Darcy and Robert Bingham**, as well as a long list of philanthropists like them, who believe in building for an even better tomorrow. Serving on our Board of Governors, Darcy is a retired educator and co-founder of San Diego Social Venture Partners (and SVP International), and is a self-described "philanthropreneur." The Bingham family were one of the first to support the Fund, knowing this endowed investment in San Diego's future will help our region stay resilient and ensure a vibrant quality of life for generations to come.

The Foundation partners with philanthropy, nonprofits, academia, business, government and others committed to building a more vibrant region today, and for future generations. These partners facilitate positive social change through philanthropy.

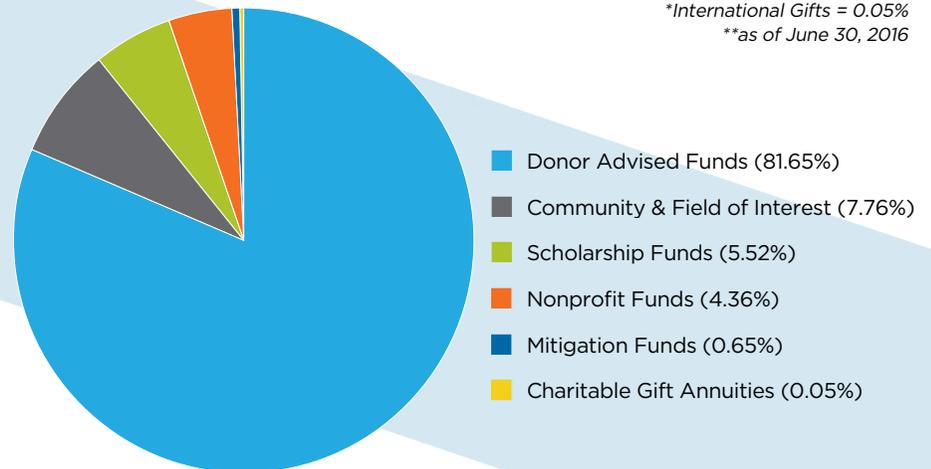
Where Grants Go

The San Diego Foundation made grantmaking history with a record year in FY 2016. Nearly 80 percent of grants benefitted San Diegans and nonprofit organizations working to advance a vibrant quality of life in the region.



Where Grants Come From

The San Diego Foundation has 2,019 charitable funds, including 130 funds opened in FY 2016, designated for grantmaking to advance a vibrant quality of life, maximize the impact of social investments and champion civic engagement.

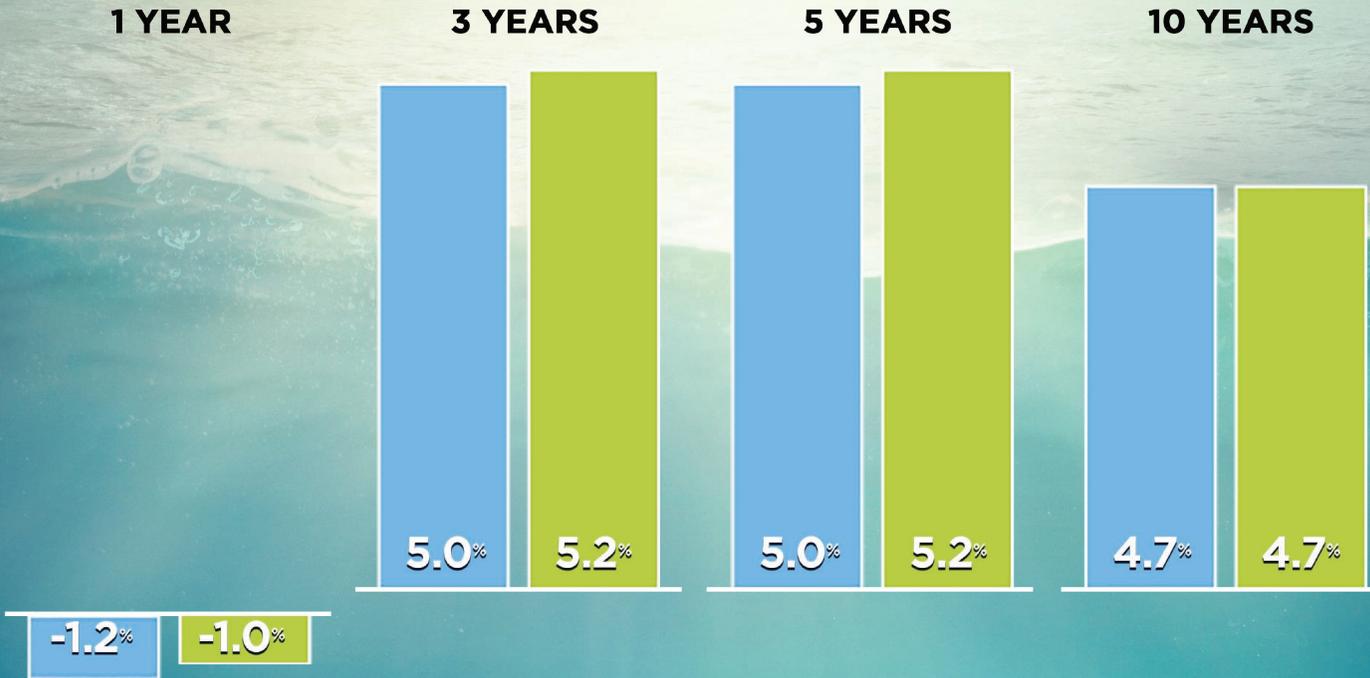


**International Gifts = 0.05%
**as of June 30, 2016*

See new funds at SDFoundation.org/NewFunds

Endowment Fund Performance

■ TSDF Actual ■ Policy Index



[Learn about our Investment strategy at SDFoundation.org/Investments](http://SDFoundation.org/Investments)

Challenging market conditions resulted in lackluster performance in FY 2016. Despite continued strength in the U.S. stock market, most other areas produced negative results. While performance was down in the Endowment portfolio, it outperformed the median of related institutions of similar size. The Foundation's Policy Index is a composite of indexes reflecting our diversified portfolio, specifically: MSCI ACWI, BC US Universal, BC Corp High Yield Index, JPM GBI-EM Diversified Index, NCREIF ODCE, HFRI FOF Index, Absolute Return of 11% Annualized, Bloomberg Commodity Index, and JPM EMBI Global Index.

*as of June 30, 2016

Total Assets Managed

2014
\$674,294,000

2015
\$685,692,000

2016
\$672,200,000

The Foundation ended FY 2016 with \$672 million in assets invested and managed, with more than \$400 million in endowment funds, \$118 million in non-endowment funds, and \$988 million in grants awarded since inception.

[View financial statements at SDFoundation.org/Financials](http://SDFoundation.org/Financials)

[See Contributions at SDFoundation.org/Contributions](http://SDFoundation.org/Contributions)

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