

CELEBRATING
30
YEARS

GIVING WITH PURPOSE

REPORT TO THE COMMUNITY 2017

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Executive Director

Laura Fleming, M.Ed
Program Officer

LETTER FROM THE PRESIDENT & EXECUTIVE DIRECTOR:

Coastal Community Foundation (CCF) began 2017 celebrating a milestone - the 30th anniversary of the Foundation. Our anniversary is a time for celebrating 30 years of giving with a purpose and to look back at our history and the collective impact of donor inspired philanthropy. In the following pages, you will learn about our early years, our growth in grantmaking and be inspired by our donors' passions and the reasons they give.

Behind each fund at the Foundation is a story about individuals who want to make a difference. We are thankful for our donors who want to make an impact in a wide variety of areas, the hard work of our board members who have dedicated their time to building a trusted foundation and our Partners in Philanthropy.

Our local funds, which are community focused, have been addressing needs in Del Mar, Solana Beach, Encinitas, Carlsbad and Oceanside. The breath of our donor advised funds have been supporting nonprofits locally, regionally and nationally in the arts, social services, animals, health, education and the environment. The Solana Beach Fund and Hand to Hand, our giving circles, have brought individuals together for joint philanthropy.

Coastal Community Foundation is committed to helping individuals fulfill their charitable goals today and in the future. Thank you for being a part of our story and for your philanthropy.



Alice Jacobson



Sharon Omahen

Alice Jacobson
President

Sharon Omahen
Executive Director

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MISSION

The mission of Coastal Community Foundation is to enhance the quality of life in the San Diego North Coastal area by directing philanthropic efforts toward community needs.

We fulfill our Mission by...

- Helping individuals and families meet their charitable goals today and in the future
- Making grants to support nonprofit programs, education, and community needs
- Providing support and technical assistance to nonprofit organizations

The Foundation is a 501(c)3 public charity, Federal Tax ID Number 33-0216692.

NATIONAL STANDARDS

The Board and staff of Coastal Community Foundation believe it is our responsibility to our donors and the community to operate with integrity, transparency and efficiency. CCF has been recognized by the Council on Foundations as accredited in meeting the National Standards for Community Foundations.



Excellence. Accountability. Impact.™

Philanthropy is important and through CCF, it's easy. We offer a simple, personal approach to giving that's tailored to each individual and family's charitable interests.

DONOR ADVISED FUNDS - A PERSONAL APPROACH TO GIVING

A donor advised fund provides the best features of a private family foundation without the legal and administrative responsibilities.

Your fund can be established with a variety of gifts: cash, stocks and property. And, you receive an immediate tax deduction in the year your fund is established.

Your grants can support local, regional or national charities. The Foundation handles all of the administrative details and our professional staff can help you identify nonprofits and programs that target issues you care about most.

You may establish a donor advised fund or other type of fund in your name, in the name of a loved one or be anonymous.

LEAVING A LEGACY

A bequest could be one of the most important charitable gifts you ever make. How it works:

- You include Coastal Community Foundation in your will as a bequest and include the name of the charitable fund.
- Upon your death, your gift will be placed in the fund you chose.
- Your charitable gift is excluded from your assets for estate tax purposes.
- Your children can be involved in making grant recommendations from your donor advised fund or CCF will issue grants in your fund's name based on the charitable interests you outlined.

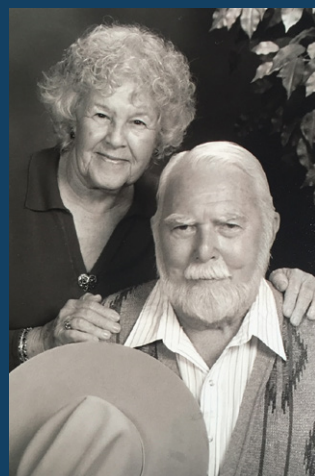
Support Your Favorite Charities:

*African Wildlife Foundation
Casa de Amistad
Catholic Charities of San Diego
Doctors Without Borders
Merced Theater Foundation
Mercy Ships
Rancho Coastal Humane Society
San Diego Botanic Gardens
Solutions for Change*

CCF LEGACY SOCIETY

CCF Legacy Society is a special group of individuals and families who have named Coastal Community Foundation as a beneficiary through a planned gift. Those gifts may be made through bequests, charitable trusts, life insurance, gifts of property and retirement funds. Membership is open to anyone who informs CCF that he or she has left a planned gift to the Foundation to establish a fund or add to an existing one.

NEW DONOR ADVISED FUNDS



LIFE GAVE US LEMONS

In December 2015, John and Kristen Tehranian founded *Life Gave Us Lemons*. Literally! Two hundred and fifteen lemon trees. They soon realized their trees would produce more lemons than their family could consume, a realization which caused them to reflect on this happy and fortunate time in their lives. *Life Gave Us Lemons* was born out of the family's desire to share the bounty with others.

MIKE AND LINDA HALL CHARITABLE FOUNDATION

Mike and Linda Hall's donor advised fund offered them flexibility. "The ability to make one larger donation and grant it out over the years was very attractive to us. The ease of administration, professional handling of the fund, and the access to local needs are well-addressed by the Foundation," stated Mike Hall. "We look forward to working with the Foundation to accomplish our goals to support education and housing."

TOM AND CATHY STAYER FOUNDATION

Tom and Cathy Stayer established their donor advised fund because of their love and care about animals. "We have seen too many animals that have been abandoned or neglected by humans. With our foundation, it is our desire to offer help to all animals who suffer needlessly. We feel every animal deserves to be loved and respected."

HUBBARD CHARITABLE FUND

The Hubbard Charitable Fund was created from a charitable remainder trust which Don Hubbard Sr. established years ago. This fund will make grants to many charitable organizations the family supported over the years.

Don and Dorothy Hubbard married in 1946, the same year he started Don Hubbard Contracting. The Encinitas community was important to Don and he had a strong commitment to help it be the best place to live. "The Hubbard family believes that CCF is the perfect place to establish our fund and continue to support local charities", states Don Hubbard Jr.

ERIC LEE DODSON MEMORIAL FUND

Eric's fund was established by his family to honor him by creating a special fund focusing on his life's work in music and sound production, and to benefit the new theater for the North Coast Repertory Theatre.

MURRAY GALINSON SAN DIEGO – ISRAEL INITIATIVE

In partnership with a growing consortium of funders that care about multi-faceted education about Israel, the Leichtag Foundation launched a new collaborative – the Murray Galinson San Diego-Israel Initiative. The goal of the Initiative is to promote and support knowledge, discourse and interaction of the modern state of Israel through scholarship, engagement and collaboration.

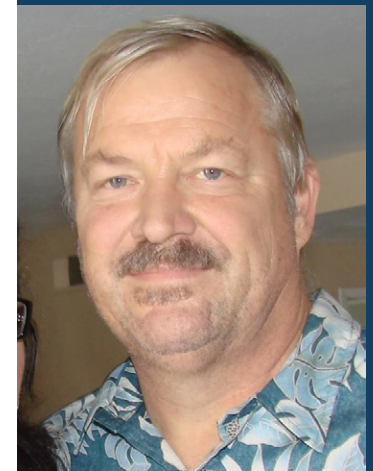
JEWS OF COLOR FUND

This fund is focused on delivering training and field-building opportunities that guide Jews of Color (JOC) and their allies in learning more about this field and its prospective development. This project was initiated by the Leichtag Foundation in 2016 in response to increasing awareness that people of color are under-represented as participants in Jewish learning experiences and a desire to help change this.

SOLANA BEACH SKATEPARK FUND

The Solana Beach Skatepark Fund was established by local residents to provide funding for a skatepark at La Colonia Park. The City of Solana Beach has allocated \$300,000 from surplus funds and additional money has been donated for the project.

NEW AREA OF INTEREST FUNDS



FUNDS AT COASTAL COMMUNITY FOUNDATION

ARTS & CULTURE

- Arts Alive Foundation – for funding for a community arts center, public art programs and performance space
- Eric Lee Dodson Memorial Fund – to benefit the North Coast Repertory Theatre
- Barbara Schneiderman Memorial Fund for Piano Enrichment – for scholarships for students to attend Suzuki music conventions
- Betty Scalice Foundation – for music education for youth and other music programs for the community

COMMUNITY BENEFIT

- Cardiff 101 Mainstreet – for Harbaugh Seaside Parkway and Cardiff community projects
- Community Fund – for support of existing and changing community needs and projects
- Dodson Community Fund – to fund projects that benefit the coastal communities
- Encinitas Garden Festival Fund – for community and school gardens in Encinitas
- Hand to Hand – to fund programs that serve women and girls
- Murray Galinson San Diego- Israel Initiative Fund
- Pause for Paws Foundation – providing resources for sheltered animals
- Solana Beach Fund – to support programs and projects that benefit Solana Beach
- Solana Beach Skatepark Fund – to raise funds for a new skatepark

EDUCATION

- Chino Memorial Fund – for education in the field of agriculture and Japanese culture
- EdVentures – to provide hands-on arts & science programs for classrooms and middle & high school training in specific industries
- Education PLUS! – to provide grants for creative classroom projects



- Fritz Muhlethaler Memorial Foundation – for wrestling and football programs at La Costa Canyon High School
- Orphan Education Foundation – teacher award recognition scholarships for students from San Dieguito Union High School District or education grants

ENVIRONMENT

- Community Environmental Fund – established in memory of Gemma Parks for environmental programs and education
- Reef Experience Foundation – to support marine conservation, research, public education, and related interests with an emphasis on Coral Reefs

HEALTH AND COMMUNITY SERVICES

- Ian Brown Foundation – for substance abuse prevention and education
- Andie Kwasny Memorial Fund – for suicide prevention programs for youth
- Fund for Mental Health – for mental health prevention and intervention programs for youth

NONPROFIT ENDOWMENTS

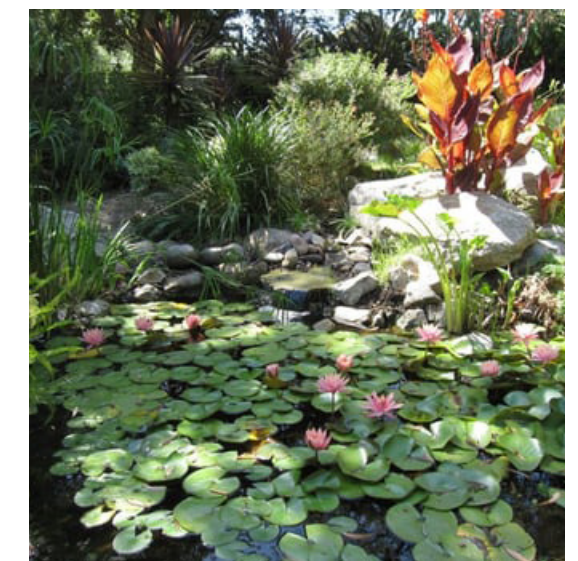
- The Classical Academies Education Endowment
- Ellen Thomas Memorial Fund for the North Coast Rep
- Friends of the Encinitas Library Endowment Fund
- Hospice of the North Coast Compassionate Care Fund
- North Coast Singers Endowment Fund
- Jonathan Tarr Foundation Legacy
- Tri-City Christian School Fund

DONOR ADVISED FUNDS

- A.R.M.S. Fund for Women and Children
- Edward and Betsy Blodgett Family Foundation
- Todd Calkins Memorial Fund
- Debbie and Bill Carpenter Family Foundation
- Marion and Lee Dodson Fund
- Dowling Family Endowment Fund
- Full Circle Fund
- Mike & Linda Hall Charitable Foundation
- Buzz & Bobbie Hegé Memorial Fund
- Ginaven Family Charitable Gift Fund
- Jews of Color Fund
- Helmut Kiffmann Fund
- John & Patricia Kelting Foundation
- Life Gave Us Lemons
- Eleanor & Robert Omahen Memorial Fund
- Tom & Cathy Staver Foundation
- Hubbard Charitable Fund

SCHOLARSHIPS

- Bill Berrier Scholarship Fund – for students who want to be educators
- Joe W. Chavez Educational Fund – for students who plan a career in medicine or government
- Leigh O. Cortez Educational Leader Scholarship Fund – to provide scholarships for teachers to obtain a master's degree in early childhood education or a similar field of study
- Jackie Harrigan-Haase Memorial Scholarship Fund – for students who want to become counselors, nurses, special education teachers or psychologists
- Eric Hall Scholarship Fund – for students who plan a career in engineering, architecture, construction management or urban planning
- Neal McNeil III Memorial Fund – to provide scholarships for students who are juniors in college and are pursuing a degree in the area of finance
- Eric Scott Langdon & Diana Monzeglio Memorial Scholarship Fund for Artists – for students who plan a career in visual or performing arts
- Malcolm Murdoch McQueen Scholarship – for Instrument Engineering
- Jay Penacho Memorial Fund – for wrestling scholarships
- Deanna Rich Trustee Award – for students who want to be educators
- Dr. Roy Risner Scholarship Fund – for graduating seniors and students attending local colleges
- Autumn Strang Memorial Scholarship Fund – for Mira Costa college students



CELEBRATING 30 YEARS



1987-1997

HISTORY

Coastal Community Foundation (CCF) was founded in 1987 by local leaders and community members. The founding board which included Bill Dean, Anne Omsted, Margaret Schlesinger and Liz Ferguson were residents who cherished the idea of a local community foundation. Peter de Francesca, CPA and attorney Greg Murrell helped incorporate the Foundation. The Foundation was primarily operated by the volunteer Board of Directors.

STARTING SOMETHING SPECIAL

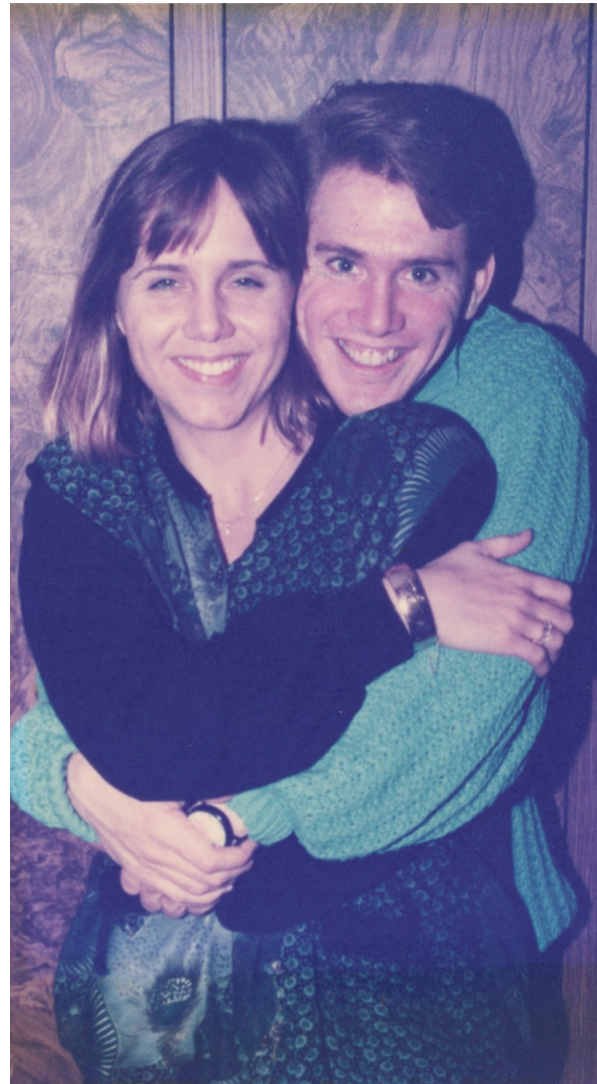
- CCF began with \$1,118 in memory of the Reverent Thelma Olson.
- During its early years the Foundation had two executive directors Dick Allison (1990-91) and Roni Seay (1991-1993) who were paid a small stipend for 10 hours per week.
- Between June 1987 and April 1992 CCF held three community awards banquets, recognizing local volunteers who were making a difference in the area.
- The Foundation hosted several Honor Roll of Educators events, saluting local teachers from North Coastal schools.



1997-2006

GROWING TO MEET THE NEED

- By 1997 Coastal Community Foundation had assets of \$377,786 and 11 funds, including Education PLUS!, Chino Memorial Fund, ARMS Fund for Women and Girls, Mental Health Fund and Ellen Thomas Memorial Fund (for North Coast Rep).
- The Foundation was operated by an all-volunteer Board of Directors.
- The Education PLUS! Grant program continued to grow and challenged local PTAs to provide matching funds for grants.
- By 2006 Coastal Community Foundation had assets of \$983,125 and 18 funds, including the Bill Berrier Scholarship Fund, Helmut Kiffman Fund, Eric Scott Langdon and Diana Monzeglio Scholarship Fund for Artists and Joe W. Chavez Education Fund.
- Annual grantmaking ranged from \$40-55,000



2007-2017

SERVING DONORS & OUR COMMUNITY

- By November 2017 Coastal Community Foundation had assets over \$5.6 million and 66 funds, including 18 donor advised funds, 12 scholarship funds, 2 giving circles, 7 nonprofit endowments and a variety of funds focused on specific areas to benefit the community.
- Between 2007 and 2016 the Foundation granted \$1,483,253 for a wide variety of nonprofits, scholarships and community programs.
- In 2017 grant-making totals from all funds will surpass \$475,000.
- The Foundation hired a part-time executive director in fall 2007. By 2015 a part-time program officer joined the staff and the executive director was no longer part-time.

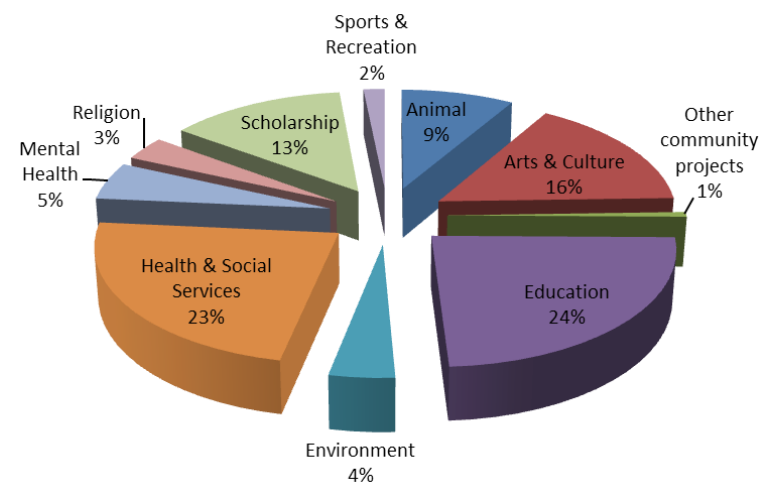


2016 GRANTS

MAKING A DIFFERENCE LOCALLY, REGIONALLY, NATIONALLY

Total grants	\$306,636
Total number of Nonprofits:	96
Number Scholarships awarded	28
Number of grants from Donor Advised Funds	55

GRANTS BY PROGRAM AREA



"I just want to say thank you so much for all the support and prayers. This dorm has changed my life. I'm grateful for this chance to learn and grow. I came in broken but I'm leaving empowered."

– Fair Dorm participant



The Solana Beach Fund
Building a brighter future for our community.

A FUND OF COASTAL COMMUNITY FOUNDATION

The mission of the Solana Beach Fund is to address local needs and to build philanthropy to benefit the Solana Beach community today and through legacy gifts. This Fund is held and managed at Coastal Community Foundation.

Since its inception in 2014, the Solana Beach Fund has made a meaningful impact on the community with eighteen grants totaling \$64,181 to the following organizations:

Boys & Girls Club of San Dieguito
California Western Community Law Project
Casa de Amistad
La Colonia de Eden Gardens Foundation
North Coast Repertory Theatre—Theatre School
Reality Changers
San Dieguito River Valley Conservancy
San Elijo Lagoon Conservancy
TIP San Diego



A GIVING CIRCLE

Hand to Hand makes an impact in the lives of women and girls in San Diego County by directing resources to programs that empower change and self-sufficiency. Hand to Hand fulfills their mission by funding: education and job training for women; programs for women re-entering the workforce; mentoring programs for women and girls and micro-finance programs in San Diego County only.

Between 2009 and 2016, a giving circle of more than 60 women, has granted \$234,858 to 19 nonprofit organizations serving women and girls in San Diego County.



INVESTMENT PHILOSOPHY

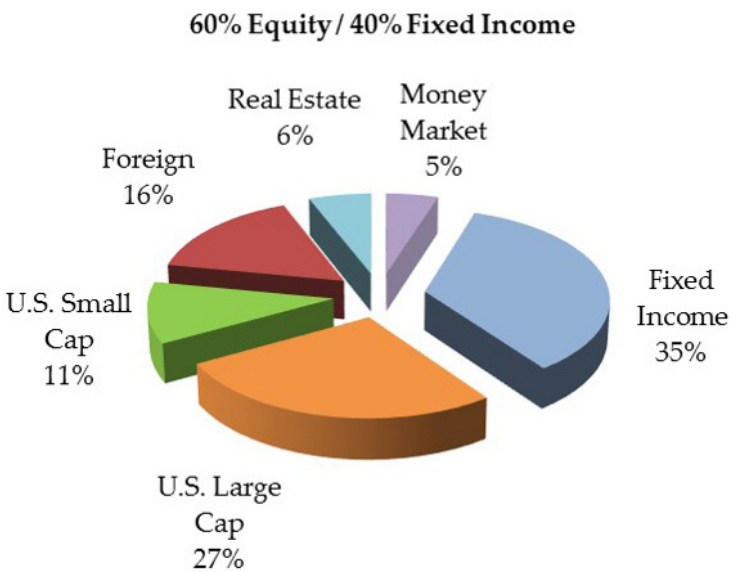
The Coastal Community Foundation’s investment philosophy has several key objectives:

- 1- to provide sufficient income for current charitable support
- 2- to preserve the purchasing power of the Foundation’s assets through capital appreciation

The Foundation’s prudent investment policy allows the Board to meet the goal of providing for current charitable needs while maintaining and enhancing long-term purchasing power. The Foundation’s investment policy which was adopted by the Board of Directors established investment objectives and constraints for ongoing investment management. An investment committee monitors investment performance and reviews the investment and spending policies.

The Foundation’s assets have been professionally managed by Dowling & Yahnke LLC, a firm that has been in business since 1991. The emphasis is in on low-cost, passive, long-term investment. The investment allocation is:

PORTFOLIO TARGET ALLOCATION



INVESTMENT HISTORY

2006	.....	13.0%
2007	.....	5.0%
2008	.....	-19.1%
2009	.....	16.9%
2010	.....	11.8%
2011	.....	-.05%
2012	.....	11.7%
2013	.....	15%
2014	.....	4.8%
2015	.....	-1.6%
2016	.....	8.9%

ANNUALIZED PORTFOLIO RETURNS as of 12/31/16



PARTNERS IN PHILANTHROPY

YOUR GIFT TO THE FOUNDATION:

- Supports our mission
- Helps the Foundation build local philanthropy and provide assistance to nonprofit organizations
- Provides assistance for new programs and initiatives that promote giving locally – today and tomorrow

Thank you to our *Partners in Philanthropy* for the period November 2016 – October 2017:

PLATINUM PARTNERS

County of San Diego – District 3
Kiffmann Family Foundation
Union Bank – Private Banking
Frances Hamilton White Donor Advised Fund (Rancho Santa Fe Foundation)

DIAMOND PARTNERS

Debbie & Bill Carpenter Family Foundation (CCF)
Bill Cox and Leslie Fausett
Helmut Kiffmann Fund (CCF)
Pacific Coast Commercial
Wick & Kathy Peterson
The Silver Trust

GOLD PARTNERS

AT&T
Edward & Betsy Blodgett Family Foundation (CCF)
Cindy Dankberg
Marion Dodson
Nancy Giberson
Gabe & Jontue Koff
Eric & Laurie Hall
Michael & Elizabeth Hall
Bobbie Hoder
John & Patricia Kelting Foundation (CCF)

Alex Kwoka and Bob Semmer
Sherry Mesman & Louis Hallman
Jeannie Nordstrom
Jeanne & Victor Orphan
John Osborne
John & Sharon Runager
Jim & Susan Street
Willis Towers Watson

SILVER PARTNERS

Bill & Barbara Berrier
Rick & June Collins
Fran & Bill Fenical
Liz Ferguson
Thomas & Donna Golich
Mike & Linda Hall Charitable Foundation (CCF)
Joe & Mary Kellejian
Jerry & Leslie Louis
Mor Furniture for Less
Evelyn Weidner
Willes Dentistry

FRIENDS

Anonymous
Eric & Suellen Lodge
Richard Heller & Joan Schmitt
Sharon Omahen & Jim Mosher
Laura Fleming & Doug Franke

IN-KIND DONORS

Aaron Chang Gallery
Culture Brewing Company
Eusinus Winery
Heron’s House Winery
Hawk Nest Winery
Papyrus Court Winery
Sunset Coast Winery
Spencer Mosher
(W)right On Communications

With appreciation to the County of San Diego and Union Bank for their sponsorship of the 30 Year Report to the Community.



“ To give away money is an easy matter and in any man’s power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man’s power nor an easy matter.”

Aristotle



live here - give here

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