



  
**Coastal Community Foundation**  
*live here - give here*  
**ANNUAL REPORT**

2019

## GOVERNANCE 2019

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**Eric Lodge**  
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Hargreaves & Savitch LLP*

### STAFF

**Sharon Omahen**, Executive Director

**Laura Fleming, M.Ed.**, Program Officer



## OUR MISSION

The mission of Coastal Community Foundation is to enhance the quality of life in San Diego North County 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
- Helping to strengthen the nonprofit sector by providing support services
- Promoting philanthropy in the community

## OUR HISTORY

In 1987 a group of local leaders established Coastal Community Foundation to provide a vehicle for people to keep charitable assets in North County for the benefit of the community. For over 32 years the Foundation has been making a difference in San Diego North County by supporting nonprofit programs, awarding scholarships and funding community projects. The Foundation is a 501(c)3 public charity.

## 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 confirmed in compliance with National Standards for Community Foundations.



Excellence. Accountability. Impact.™

## GIVING THROUGH COASTAL COMMUNITY FOUNDATION

A Donor Advised Fund (DAF) at Coastal Community Foundation makes it easy to support the nonprofits and causes you care about most, locally, regionally or nationally. Or you can contribute to an existing fund that matches your interests.

### HOW TO START YOUR DONOR ADVISED FUND



#### **Make a tax-deductible donation to establish your DAF**

- Donate cash, stocks, mutual funds –the minimum is \$5,000
- Take an immediate tax deduction allowed by the IRS
- Your fund can be in your name or a name you choose and you can name successor advisors



#### **You can grow your donation tax-free in your DAF**

- You can decide to have your gift invested or placed in a money-market fund
- While you decide what nonprofits you want to support, the Foundation's knowledgeable staff can help you identify programs that target issues you care about most



#### **Support the nonprofits or educational institutions you like over time**

- You can make grant recommendations to any qualified 501(c)3 organization
- Your grant can include your fund name or be anonymous



# Charitable giving is one of life's most rewarding acts.



## LEAVING A LEGACY

A bequest can be one of the most important charitable gifts you make. Here is how it works:

- You include Coastal Community Foundation in your will as a bequest and include the name of the charitable fund you want to benefit.
- Upon your death, your gift will be placed in the fund you choose.
- Your charitable gift is excluded from your assets for estate tax purposes.
- If your gift benefits your donor advised fund, your children can be involved in making grant recommendations.

**CCF Legacy Society members** are those who have named the Foundation as a beneficiary through a bequest, charitable trust, life insurance, gifts of property or retirement funds. Members are those who have informed CCF that he or she have left a planned gift to the Foundation.

**Donor Advised Funds and Bunching Donations** With the new tax law passed in 2017 and the increased standard deduction, individuals looking for ways to exceed the higher standard deduction may consider pooling several years' worth of charitable donations into a single contribution to a Donor Advised Fund. The benefit of this is that you can continue to support nonprofit organizations through your Donor Advised Fund during the years you are taking the standard deduction. Consult with your financial advisor and accountant.

## NORTH COUNTY RESIDENTS GIVING BACK TO THE COMMUNITY

Behind each of the funds at CCF there is a story about individuals and families who want to make a difference through their funds.

### DONOR ADVISED FUNDS

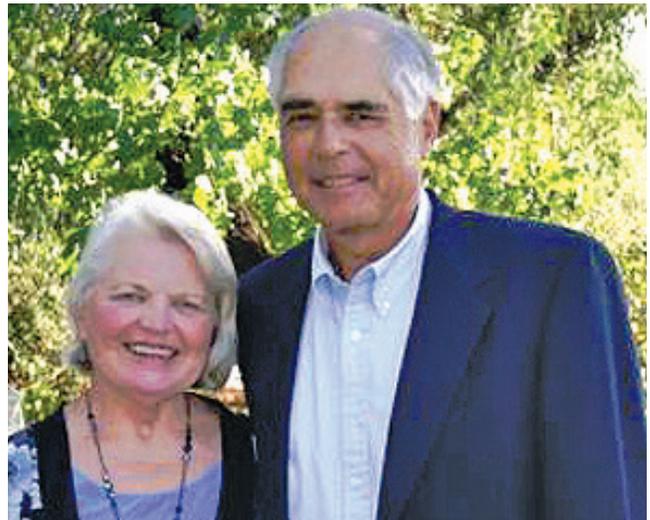
Local residents establish Donor Advised Funds for a number of reasons. They are an easy, tax-efficient way for individuals or families to support their favorite charities.

- The only record keeping for tax purposes is the contribution to your fund.
- You get to advise on grants from your fund over time.
- You do not need to select the charitable recipients the same year you contribute to your fund.
- Your children or grandchildren can be involved with your charitable goals.

### 2019 DONOR STORIES



**Fleming-Franke Charitable Fund** – As founders of the Solana Beach Fund, philanthropy is important to Laura and Doug. They established their donor advised fund with a gift of appreciated Qualcomm stock. Laura and Doug explained, “We like to be involved philanthropically in our community. Setting up a donor advised fund was a great option for us. It allowed us to avoid capital gains taxes and give more to the nonprofits we care about most. The process was easy and fun. There is something special about coming up with a fund name that elevates the experience of giving and makes us think more deeply about our annual donations. ”



**Golich Family Fund** – Tom and Donna Golich, long time Solana Beach residents, established their fund with gifts of appreciated stock. They support a wide variety of nonprofit organizations in the community. “We own shares of a highly appreciated stock, which we have been selling annually for tax purposes. By putting the proceeds from the sale of the stock into a donor advised fund at CCF we can distribute the proceeds in smaller amounts to a larger number of charities rather than just one or two charities. Doing this through CCF is easier than through our broker,” stated Tom & Donna.

**Other New Donor Advised Funds: Papaya Memorial Fund • Tierra Fund • Anonymous Family Fund**

## SCHOLARSHIPS

Scholarships can benefit students of any age or education level. Donors determine the selection criteria for their scholarship fund, including the schools the recipients come from, the schools they attend, their level of financial need or academic performance.



**Joe DeCamp Memorial STEM Scholarship** will provide awards to North Coastal San Diego students who have declared an interest in STEM (Science, Technology, Engineering, and Math) and represent the ideals of Scouting – Duty to God, Country, Others, and Self. Joe's family and friends wish to encourage students committed to STEM careers and recognize their community service performed through Scouting.



**Steve Pratt Refuse to Lose Scholarship** provides scholarships to students graduating from Scripps Ranch High School who play varsity sports. Steve was a Scripps Ranch resident who touched the lives of countless kids through his involvement in youth sports during his 20+ years in the community. He brought a tremendous amount of energy and passion to his coaching and influenced so many kids.



## FIELD OF INTEREST FUNDS

Donors can contribute to the Foundation to support specific program areas. Grant Committees make distributions from the fund based on the fund's guidelines.



**ENCINITAS FUND** – This new giving circle was established by community residents to address local needs and to encourage philanthropy today for the benefit of Encinitas and all of its neighborhoods. Grants support numerous nonprofits and community projects in Encinitas.



**FUND FOR SUPPORTIVE HOUSING & HOMELESS RECOVERY** – This fund provides grants for programs and services that address housing needs in North San Diego County, homelessness, recovery from homelessness and continuum of care for transitional or chronic homelessness.



**JWG SCIENCE** – This fund was established by a Solana Beach resident. Grants will support science programs in memory of her husband.



# INVESTMENT PHILOSOPHY

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

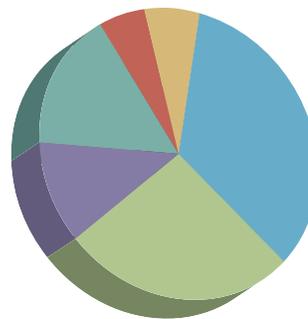
- 1 – to provide sufficient income for current charitable support**
- 2 – to preserve the purchasing power of the Foundation’s assets through capital appreciation**

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.

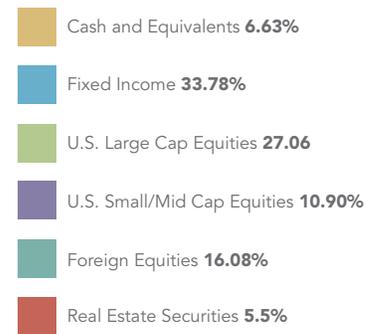
The Foundation’s assets have been professionally managed by Dowling & Yahnke LLC, a firm that has been in business since 1991. The emphasis is in on low-cost, passive, long-term investment. The investment allocation is:

Equity and equity fund holdings: 60%  
 Fixed Income: 35%  
 Cash and cash equivalents: 5%

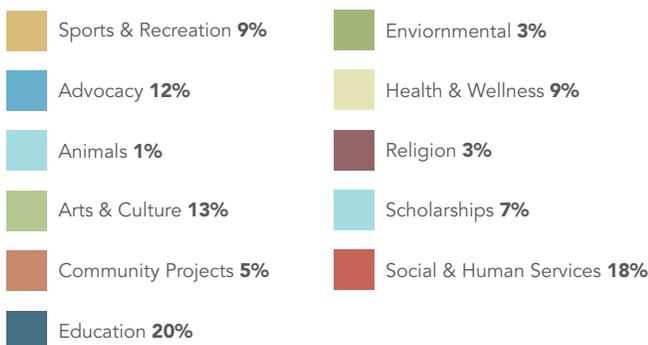
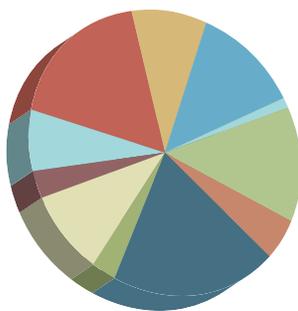
2019 Investment Return  
 17.43%



## Allocation by Asset Class



# 2019 GRANTS BY PROGRAM AREA



# QUICK FACTS

- 214 grants and scholarships totaling over \$810,000
- 80% of the grants supported San Diego County nonprofits, community projects and scholarships to local students
- 124 grants were made from Donor Advised Funds, totaling \$475,721
- \$50,000 was awarded to local high schools for Career and Technical Education and Visual and Performing Arts
- 48 scholarships were awarded
- The new Fund for Homelessness and Housing Recovery awarded \$50,000 to help youth, families, seniors and veterans in North County
- \$62,140 was awarded from giving circles
- Nine nonprofit and school endowments receive distributions to support their missions

## PHILANTHROPY IN ACTION

With over eighty funds, Coastal Community Foundation makes a positive difference in the region through both its competitive grant programs and donor advised funds (DAF).

- A** The **Betty Scalice Foundation** at CCF helped underwrite the Carlsbad Music Festival.
- B** **Fund for Supportive Housing & Homeless Recovery** helped homeless youth with a grant to Lifespring at North County Lifeline.
- C** Many funds at CCF support environmental education through grants to the San Diego Botanic Garden.
- D** Magdalena Ecke Family YMCA served youth and families in North County with support from the **Hubbard Charitable Fund**.
- E** The **KL Calkins Family Fund** supported the St. James St Leo's Medical Clinic.
- F** The **EdVentures Fund** supported Career and Technical Education (CTE) in North County high schools.





G



H



I



J



K



L

G Many funds at CCF support world-class productions at the North Coast Rep.

H The **Solana Beach Fund** made a grant to the North County Immigration and Citizenship Center.

I **The Foundation** established a project fund for the new Skatepark in the City of Solana Beach.

J The **Junior Cares (Mark Girard Jr.) Memorial Fund** supported a surfing event for the blind through Swami's Surfing Association.

K The **Dowling Family Fund** helped empower survivors of human trafficking through support of Free to Thrive.

L Visual and Performing Arts (VAPA) program in Carlsbad received support from the **EdVentures Fund**.

## PARTNERS IN PHILANTHROPY

### PLATINUM PARTNERS

Carol Childs and Peter House  
Helmut Kiffmann and Patricia Moore  
Kiffmann Family Foundation

### DIAMOND PARTNERS

Michael and Elizabeth Hall  
Wick and Kathy Peterson

### GOLD PARTNERS

Edward and Betsy Blodgett  
Family Foundation (CCF)  
Pete Boukouzis  
Bill Cox  
Dankberg Family Foundation  
Marion Dodson  
Karen Duncan Bonner  
Leslie Fausett  
Nancy Giberson, PhD.  
Pollie Gautsch and Darryl Matsui

### GOLD PARTNERS (CONT.)

Golich Family Fund (CCF)  
Eric and Laurie Hall  
Linda and Mike Hall  
Peter and Nancy Iverson  
John and Patricia Kelting  
Gabe Koff PhD. and Jontue Koff  
Sherry Mesman and Louis Hallman  
Alexandra Kwoka and Bob Semmer  
Mike and Adele Lapadula  
John Osborne  
John Runager

### SILVER PARTNERS

June and Rick Collins  
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James Merrill  
Matthew Semmer,  
Resonate Real Estate

### FRIENDS

Richard and Lyn Allison  
Anonymous  
Laura Fleming and Doug Franke  
Jimbo's, Carlsbad  
Sharon Omahen and Jim Mosher  
SoLo on Cedros

## THANK YOU TO OUR REPORT SPONSORS:



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