



San Antonio Area Foundation

Where Giving and Community Connect

MY COMMUNITY Newsletter

Quarter 1 | April 2015

By the numbers

(year-to-date through 3-31-15)



\$287M

Total Assets



\$4.6M

Grants and
Scholarships
Distributed



\$8M

Contributions



498

Funds Under
Management



30

Nonprofit
Trainings



584

Training
Participants



5,845

Guests visited
Wells Center

Special Gift Creates Opportunities for Community Projects

The Area Foundation provides seed funding for LISC, Predatory Lending and The Open Table

A grant from the Katherine C. Carmody Charitable Trust gave the San Antonio Area Foundation the flexibility to invest in issues that could have a transformative impact in the community. This special gift is unique because of its unrestricted nature. Below you will learn about the community projects the Area Foundation has funded as a result of this grant. These projects include Local Initiative Support Corporation (LISC), predatory lending and The Open Table.



- A recent HUD report indicated that San Antonio needs 153,000 dwellings to replace substandard housing and meet the incremental need for new low-income housing. In 2012, LISC, a national funder out of New York, conducted an assessment of San Antonio. As a result of the assessment and discussions with the community, LISC made a commitment to open an office in San Antonio and work on revitalizing our neighborhoods.
- There are approximately 300 predatory lending locations in San Antonio with APRs between 300 – 550%. Predatory loans result in a cycle of debt from which it is difficult, if not impossible, to escape. The Area Foundation has funded the creation of a business plan and lending software which will enable LiftFund, a microlender agency, to create a predatory loan fund in San Antonio. The Area Foundation has also funded a beta test of a lending program that has been proven to work in both impoverished communities and communities where there is a strong Veterans presence.
- The Open Table uses volunteers from local churches to create tables of six to 12 people to support a person in need such as those aging out of foster care and the homeless. The Open table has an 85% proven success rate of individuals who achieve their goals. Currently, there are 13 Open Tables at local churches and the plan is to create 20 more in the next year. The Area Foundation funded the opening and operating expenses of The Open Table office in San Antonio. The Open Table is now operating independently.

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Demonstrating Leadership Amidst Great Change

A Letter from the President/CEO of Your Community Foundation



Dennis E. Noll
President/CEO

Dear Friends,

As we move through 2015, it is our privilege to look out over the San Antonio community and envision our next 50 years. As your community foundation, we work to address the critical needs of our community by identifying gaps and being intentional in our leadership and allocation of resources. At the San Antonio Area Foundation, we rely on a team of staff and volunteers who work with key constituents to move our mission forward. This year, we have adopted "demonstrating leadership amidst great change" as an overarching goal.

The San Antonio Area Foundation demonstrates leadership in the community in numerous ways. One of those ways is playing a key role in investing in issues that can positively impact the people of San Antonio and transform our city. In this newsletter, you will read about the seed funding we provided to launch several community projects during the past two years. These projects include The Open Table, LISC, predatory lending, among others. The funds received from the Katherine C. Carmody Charitable Trust have enabled the Area Foundation to step forward on these issues and take a leadership role in creating change in San Antonio.

To keep you abreast of the exciting things going on at the San Antonio Area Foundation, I would like to personally invite you to join us for Quick Connections. Quick Connections are 20-minute conversations covering issues impacting our community. We will lead these conference calls and address topics such as our community initiatives, donor services and certification programs. Enclosed you will find a flyer with the dates of the calls as well as a calendar of upcoming trainings and workshops.

As we think about this year's theme, Demonstrating Leadership Amidst Great Change, I would like to leave you with the following quote from my grandson's namesake: "The best thing you can do is the right thing; the next best thing you can do is the wrong thing; the worst thing you can do is nothing." - Theodore Roosevelt.

With sincere gratitude,

*We are San Antonio's
Community Foundation.
We exist to make San
Antonio a better
place to live.*



Confirmed in compliance with U.S. Standards for Community Foundations

Kinetic Kids offers recreational, sports programs to special needs children

In 2014, the Area Foundation contributed \$19.9 Million in Grants to Nonprofits



Kinetic Kids provides health, recreational and educational services to children with special needs and their families. Last year, Kinetic Kids provided these services to 3,375 families and their children. A 2014 grant from the San Antonio Area Foundation supported Kinetic Kids' sports and recreational programs general operational expenses. This included buying equipment, trophies, and uniforms among other things for the programs.

"When someone supports us like the Area Foundation, it sends a message that these children matter. It also shows that someone believes in investing in them and maximizing their potential," said Tracey Fontenot, PT, Co-Founder and Executive Director and Kacey Wernli, PT, Co-Founder and Executive Director. "We feel Kinetic Kids provides children the ability to grow into adults with confidence and pride; becoming productive members of society."

To learn more about Kinetic Kids, visit kinetickidstx.org. For a list of our 2014 grantees, go to saafdn.org/communitygrants.

Fund plans to empower victims, survivors of violence to share their stories

Welcome New Funds to Our Family of Fundholders

Patricia A. Hagen Foundation Fund
Whataburger Family Foundation
AugustHeart Agency Investment Fund
Jessi's Message Fund
Parman Living Trust Fund
OST Fund
John L. Santikos Employees Scholarship Fund
John L. Santikos Charitable Foundation Fund

"Since we already have a fund with the Area Foundation it seemed like a natural transition to have Jessi's Message Fund as well. Having worked with victims and survivors for the last three years, we saw a real need to enable and give them the confidence to tell their story with conviction and strength, and that's what we plan to do through this fund." - Sandy Phillips, Fund Representative



Grant supports NSBE's STEM program

Outreach Fund Spotlight: San Antonio Area African American Community Fund

The San Antonio Area African American Community Fund (SAAAACF) recently awarded \$10,000 in grants to four deserving nonprofits. The San Antonio City Wide National Society of Black Engineers (NSBE) Jr. Chapter is a grantee. With this grant, NSBE plans to increase the number of middle and high school students majoring in Science, Technology, Engineering, and Math (STEM) fields. Students will participate in Ten80 National STEM League Education Program and VEX Robotics competition. "NSBE is not just for African American students, but for all students. Students do not have to be just interested in obtaining engineering technical skills. The competitions show students the importance of a variety of skills including presentation and communications skills," said Devethia Thompson, Program Advisor for NSBE. Learn more at sanantonionsbejr.com.

Support SAAAACF by donating at saafdn.org/SAAAACF. For more information about SAAAACF, contact Rashanea Shakir, Community Outreach Manager at rshakir@saafdn.org.



Animal No-Kill achieves 89% live release rate

Community Initiative Spotlight: Talk About It! Animal No-Kill Initiative



We've been working for eight years with the City of San Antonio and nonprofit animal welfare agencies to help make San Antonio a no-kill community for dogs and cats. In 2007, the live release rate was 33% (18,373 dogs and cats). In 2014, the live release rate reached 89% (45,337 dogs and cats). Spay/neuter capacity in Bexar County increased adding three clinics and the opening of two shelter clinics. The support from the San Antonio Area Foundation donors and the grants made to animal nonprofits has made this possible. Learn more about our Animal No-Kill initiative at saafdn.org/animalnokill.

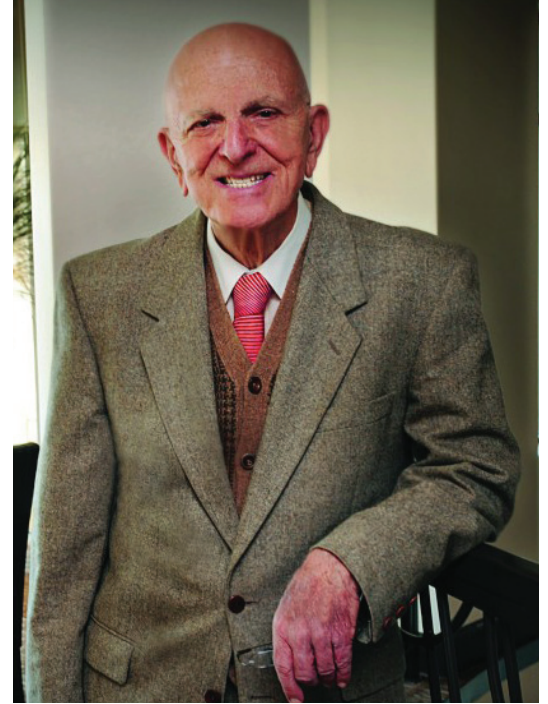
Bring your pet on Saturday, May 23, 2015 to Rosedale Park from 10 a.m. – 3 p.m. for Bark in the Park/Perrito Grito. For more information, visit perritogrito.org.

San Antonio Area Foundation Announces Gift of Santikos Theatres, Real Estate Developments

The John L. Santikos Legacy Gift

The San Antonio Area Foundation announced on Wednesday, April 15 a gift from Mr. John L. Santikos of the ownership interests in the Santikos companies, which includes multiple theatres and real estate developments. The Area Foundation has established the John L. Santikos Charitable Foundation, a fund of the Area Foundation, which will hold the gifts. The companies will remain in operation under the Area Foundation. Cash flow generated will be used for charitable purposes according to the guidelines left by Mr. Santikos. The Area Foundation anticipates that this legacy gift will significantly increase its assets, but does not have a valuation at this time.

More than \$6 million will be distributed this year from the John L. Santikos Charitable Foundation. This includes a \$255,000 matching contribution to The Big Give S.A., \$200,000 to United Way initiatives and more than \$2 million to the Area Foundation's annual competitive grants program. The Area Foundation is currently evaluating the most impactful ways to grant additional funds in a manner that benefits both the community and honors the legacy of Mr. Santikos. Additional funds will be granted at the end of 2015.



To read the full press release, please visit our website at saafdn.org/news.

Real Estate Sale = Tax Savings + Gift to Charity

Planned Giving Brief



Susan and Kevin bought a house along Canyon Lake many years ago. They paid about \$40,000 for the lake house and it is now worth almost \$200,000. They want to sell the house. After talking to a tax advisor, they discovered that if they gave a 25% interest in the property to a charity before the sale, they would receive two benefits. They would get an income tax deduction for the value of the gift plus save on capital gains tax on the 25% interest given away. Those benefits offset a large portion of the tax on their \$150,000 when the property actually sold. They were very pleased with the "double benefit:" their tax savings and the gift they were able to give to charity.

To learn more about planned giving, contact Kathleen Finck, Esq., Director of Gift Planning, kfinck@saafdn.org.

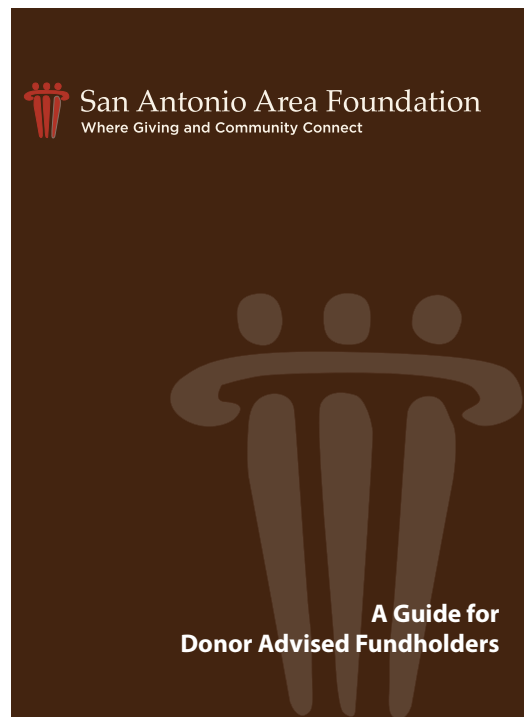
**Please note: The names above are representative of a typical donor and may or may not be an actual donor to our organization.*

Six Guidelines for Recommending a Grant from Your Donor Advised Fund

Quick tips for Donor Advised Fundholders

Would you like to recommend a grant? There are six simple guidelines to follow when recommending a grant. These guidelines can also be found on page 2 of your handbook, A Guide for Donor Advised Fundholders.

- Grantees must be a nonprofit with an approved 501(c)(3) status.
- Focus area is San Antonio; However, grants can be awarded anywhere across the U.S. For grants outside the U.S., please contact us.
- Grants can be for general operating support, a specific purpose, or program; or to support a capital campaign. A grant cannot be used for memberships, pledges or fundraising event tickets.
- Grant amounts must be a minimum of \$250.
- Grants may be distributed in multiple installments.
- Recommendations over \$100,000 requires the written approval from the Area Foundation's board of directors.



Area Foundation Happenings



Excel Beyond the Bell-San Antonio

On February 19, 27 out-of-school time organizations made a public commitment to work together to ensure that every child in San Antonio becomes a healthy, resilient and engaged member of our community.



Annual Meeting and Investment Luncheon

We had more than 190 donors, board members, volunteers, and community members join us at our 2015 Annual Meeting and Investment Luncheon on March 3. Visit our website for a summary and recap video of the event.



Welcome Breakfast for New Partners

The Area Foundation hosted the first welcome breakfast of the year on February 5. Community members joined us to learn more about our work in the community.



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Important Reminders



San Antonio Area Foundation
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Quick Connections

LATEST NEWS & UPDATES IN 20 MINUTES



The San Antonio Area Foundation is excited to bring you Quick Connections, 20-minute conversations impacting our community. All Quick Connections will take place from 8 - 8:20 a.m. CST. To join these calls, please dial 1-712-775-7031. Our meeting ID is 979-500-399. Please note that you don't have to R.S.V.P. to join the calls.

- Inside the Community: LISC, Predatory Lending, Open Table *Wednesday, July 15, 2015*
- Charitable Gift Planning - Which Assets are Best? *Wednesday, September 23, 2015*
- San Antonio Area Foundation's Nonprofit Certification Programs *Wednesday, November 18, 2015*

Donor Advised Distribution Process

Reminder that The Big Give S.A. online giving day event is May 5th. Due to the high volume of distributions during May, your donor advised distributions may take longer than 5 - 7 business days to process. Please let us know if you need us to expedite your request during this timeframe. Thank you for your patience and support.

Watch Investment Video Part I: Objectives for Investing in Equities

You can access the link to watch part one of our investment video at saafdn.org/investments or through the donor portal "Access My Fund," web page.

Calendar of Events

All events are held at the Area Foundation's Wells Center unless otherwise noted.

MAY

- 5 The Big Give S.A.**
Midnight - Midnight
- 7 Leadership Ladder**
9 a.m. - 12 p.m.
- 14 Marketing for Nonprofits**
9 a.m. - 12 p.m.
- 27 Training and Development of Employees and
Volunteers for Nonprofits**
9 a.m. - 12 p.m.
- 28 To Be or Not To Be a 501(c)(3)**
12 p.m. - 2 p.m.
- 28 Finding Funders Library Training**
2 p.m. - 3:30 p.m.

JUNE

- 15 Managing and Recruiting Volunteers**
9 a.m. - 12 p.m.
- 16 Board Principles Legal Compliance**
9 a.m. - 12 pm.
- 19 2nd Annual Juneteenth Celebration**
6 p.m. - 9 p.m.
- 24 Basic Grantwriting Proposals**
9 a.m. - 3 p.m.
- 25 To Be or Not To Be a 501(c)(3)**
12 p.m. - 2 p.m.
- 25 Finding Funders Library Training**
2 p.m. - 3:30 p.m.
- 30 Event planning for nonprofits**
9 a.m. - 12 p.m.

JULY

- 9 Government Grantwriting**
9 a.m. - 3p.m.
- 10 Grant Management Techniques**
9 a.m. - 12 p.m.
- 23 Finding Funders Library Training**
2 p.m. - 3:30 p.m.

Dates and times subject to change.
Visit saafdn.org/calendar for registration
information and complete details.