



**Impact needs a multiplier.**



San Antonio  
Area Foundation



**We've done the math.** As San Antonio's most trusted and impactful philanthropic partner, we've learned that, while immediately helpful, the lasting impact of a direct financial gift can often be short-lived.

What makes our approach unique? We start upstream. Not only do we distribute funds to great community agencies, we also invest in training programs for civic leaders, capacity-building, and other innovative ideas that multiply the impact of sweat equity and donations to generate dividends that truly change lives.

# The multiplying effect.

The Area Foundation combines your gift with others who, like you, want to impact the lives of those in need. By investing in systemic solutions, we can provide both a safety net for immediate relief and community-wide change that lasts a lifetime.



total grants since 1964 ... **\$750M+**

total 2022 grants ..... **\$57.6M**

to nonprofits ..... **\$48.7M**

in scholarships ..... **\$7.7M**

in hardships ..... **\$1.3M**

charitable funds ..... **577**

grants to nonprofits in 2022 .... **1,285**



# SOLVING THE PROBLEM OVER TIME

**Understanding the cause is the first step in creating a solution.**

In 2022, the Area Foundation continued to close opportunity gaps for older adults and students through Successful Aging and Living in San Antonio (SALSA) and UP Partnership. The Area Foundation initiated each project by convening stakeholders to identify the root causes of community challenges. We then utilized a collective impact model to ensure that the best ideas, intentions, and efforts are coalesced into long-term solutions for sustainable improvement.

## SALSA

was created to increase leadership, collaboration, and funding to ensure older adults have access to necessary services, information, and support systems. Starting with community-based research, strategic planning, and collaboration, SALSA’s mission is to transform our community by advancing practices and policies that improve the quality of life of isolated older adults in Bexar County.



**2015** The Area Foundation invests in SALSA, a first-of-its kind movement in the region by inviting community leaders to the table.

**2016** SALSA begins with stakeholders from 25 nonprofits and forms working groups to transform thought into action.

**2017** SALSA Steering Committee produces a roadmap for success.

**2019** SALSA continues to grow, enacting best practices for serving older adults as outlined by the World Health Organization (WHO).



**2020** The Area Foundation invests in SALSA by hiring staff focused on maximizing its potential for collective impact.

**2021** SALSA produces research, toolkits, and grants to reframe how we think about older adults.

## 2022

The SALSA network grows to 50 nonprofits.

Volunteers dedicate more than 2,000 hours on Silver Connect, a free peer support hotline.

New caregiver report is issued and distributed.

Forms new partnership with key stakeholders focused on affordable housing.

Reframing Aging initiative organized 25 workshops for more than 1,000 participants.

## UP PARTNERSHIP

Youth development creates transformative experiences for around 80,000 young people in San Antonio annually. However no single organization could achieve such an ambitious vision in isolation.

Ryan Lugalia-Hollon, CEO of UP Partnership, came to San Antonio in 2015 as the first full-time employee of Excel Beyond the Bell (EBBSA), a network housed under the Area Foundation. This cradle-to-career continuum bridges opportunity gaps from a challenging childhood to thriving adulthood.



**2009** P16 Plus Council of Greater Bexar County is created.

**2012** Excel Beyond the Bell San Antonio (EBBSA) is founded under the Area Foundation. Its vision was to make San Antonio the top city in the country for youth to learn, grow, and thrive by creating transformative experiences for young people in Bexar County.

**2018** EBBSA merges with P16 Plus.

**2019** P16 Plus rebrands as UP Partnership.

**2020** UP Partnership, with the City of San Antonio and the Area Foundation as anchor partners, is awarded \$8 million from Blue Meridian Partners to create a community-wide plan for equitable recovery and economic mobility.

UP Partnership launches the Equitable Recovery Pledge, which aims to ensure that all young people can equitably recover from the inequities exacerbated by the COVID-19 pandemic.

## 2022

UP Partnership launches the Future Ready Bexar County Plan, which brings together cross-sector partners in an effort to reach a collective North Star goal – to increase the percentage of Bexar County’s high school graduates enrolling in a postsecondary degree or credential program to 70% by 2030

UP Partnership named one of six implementation partners by Corporate Partners for Racial Equity (CPRE), in which UP serves as the lead advisor for CPRE’s Justice and Safety investments. The Area Foundation is the key fiscal agent for CPRE.

UP Partnership initiates an organizational restructure to focus efforts on cultivating the cross-sector connections necessary for the success of the Future Ready Bexar County Plan.





UP Partnership was invited to submit an \$8 million proposal to Blue Meridian Partners and subsequently asked the City of San Antonio and the Area Foundation to be anchor partners in the proposal, specifically to help equitably distribute large portions of the funds to youth-serving, community-based organizations.

It was a natural next step in the partnership, as the San Antonio Area Foundation was the first private funder to invest in UP Partnership's vision of a citywide plan for children and youth and, since 2015, has always been an excellent model for how philanthropy can walk alongside a collective impact backbone to drive big changes together.

*– Dr. Ryan Lugalía-Hollon, CEO of UP Partnership*

As trustees of a substantial family private foundation, we wrestled with how to pass on to the next generation the responsibility of managing a large foundation. As the number of family members grew, it was quickly becoming unwieldy to administer grants, make investment decisions, and delegate responsibilities. Having had experience with donor-directed funds in our respective localities, the ideal solution was to close the private foundation and distribute funds into those donor-directed funds. The San Antonio Area Foundation respected our wishes concerning future advisors solving the problem of succession. The Area Foundation also permitted us to make grants outside of San Antonio which was also an important feature for us.

*– James Lazarus & Susan Gershernhorn, Lazarus-Gersherhorn Family Fund*



# DONOR + ADVICE : A FORMULA FOR IMPACT

With the hundreds of nonprofits in the San Antonio area, we take the confusion out of where exactly to direct your gift. The Area Foundation has done the research, identified motivated changemakers, and helps donors find the perfect fit for their charitable goals. Let us help you empower local nonprofits to do what they do best.

*To learn more about Donor Advised Funds, visit [www.saaafdn.org](http://www.saaafdn.org).*

## THE BUSINESS OF GIVING

### Magnolia Pancake Haus

After doing some research on the process to create a foundation as well as maintain status and operations, **Tricia Fleming, President of Magnolia Pancake Haus**, realized that partnering with the Area Foundation was the smartest move. Tricia and her father Robert opened a Donor Advised Fund (DAF) to accomplish their philanthropic goals.

“We loved the Area Foundation’s mission and their role in our community. The partnership allows us to work with a group who already has expertise in the field and allows us to do the part that we really wanted to do — help make a change in our community by working with lesser-known nonprofits to raise awareness for them and generate large contributions to their mission.”

As a business leader, Ms. Fleming values the philanthropic role companies can play in making San Antonio a great place to live.

“I think San Antonio definitely has a lot of philanthropic involvement from so many great companies, but to be honest I think a lot of times it can end up just being a check mark on a list or an event to attend. It is so important in our community to help raise awareness of nonprofits that are truly making a difference for people and help everyone to recognize their efforts to generate a more conscious community.”

*Robert and Sheila Fleming,  
Founders of Magnolia Pancake Haus*



## RESPONSIVENESS IS KEY

### Michael and Cynthia Gibbs: The Gibbs Family Fund

When Whataburger relocated its headquarters to San Antonio from Corpus Christi in 2009, as General Counsel, I met with the Area Foundation to explore moving Whataburger’s foundation assets. I was impressed with the professionalism, services offered, and flexibility to accommodate the company’s strategy.

The Area Foundation immediately established itself as our partner, building a structure to meet our charitable objectives. Our internal governing committee met with the Area Foundation staff on a regular basis to review the fund management and continually refine the operational execution of distributing funds for employee hardships and scholarships. This level of collaboration was a refreshing change and exceeded our expectations.

I retired from Whataburger in 2019 and wanted to establish a program of giving back to San Antonio. My wife and I wanted to be a part of the Area Foundation’s mission “to close opportunity gaps for those that need it most.”

Government programs, no matter how well intentioned, are typically slow to develop, slow to respond, and usually burdened with red tape. In contrast, the Area Foundation is a pioneer in providing multi-year, unrestricted grants to selected

philanthropies, which facilitates budget planning and eliminates the uncertain “hand-to-mouth” funding for those organizations. The unrestricted grants reflect the “trust-based” philosophy of the Area Foundation allowing the organization to focus on achieving its philanthropic objectives without artificial, time-consuming, and cumbersome guardrails.

The Area Foundation is responsive to each individual DAF, including ours, by recommending charities that complement the objectives of the respective DAF. They also lead by example, identifying and responding to exigent circumstances in the community by setting up funds and inviting its DAF partners to participate.

In response to the Uvalde shooting, the Area Foundation created a “Uvalde Strong Fund” to benefit the victim’s families. In both instances the Area Foundation invited its partners to participate in these funds.

We did.

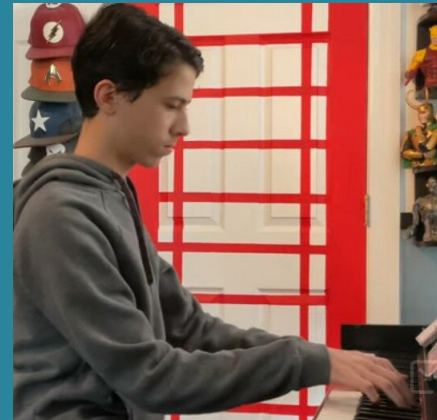


# AFTERMATH.

The usually quiet town of Uvalde was shaken to its core following a devastating school shooting on May 24, 2022. As San Antonio’s philanthropic first responder, the Area Foundation was flooded with calls from those who were desperate to provide support to the nearby community.

Within 24 hours, the Area Foundation partnered with Kerrville-based Community Foundation of the Hill Country to set up two funds, The Uvalde Strong Survivors Fund and the Uvalde Strong Fund, creating a critical, trusted process for community foundations, other nonprofits, and donors of all backgrounds to direct their mass contributions of compassion.

*To learn more about the Uvalde Strong Funds and to continue to give, visit [www.saafdn.org/uvalde](http://www.saafdn.org/uvalde).*



New York teenager, Mariano Schwartz, sent 11 donations totaling nearly \$3,000 to the Uvalde Strong Survivors Fund as he played piano gigs on behalf of the Uvalde children, teachers, and families for 21 days in a row.

The Uvalde Strong Survivors Fund collected thousands of individual donations, large and small, from everyday people and from collective efforts such as a Dallas Girl Scout troop, a San Francisco preschool, and a Big Band jazz concert fundraiser in El Paso.

A total of 2,200 donations totaling \$1.7 million were gathered before the fund was closed in October 2022. Donations were sent to families of victims and surviving children in partnership with The National Compassion Fund (NCF) — an organization that aids communities in the equitable distribution of funds to victims’ families and survivors after mass casualty shootings.

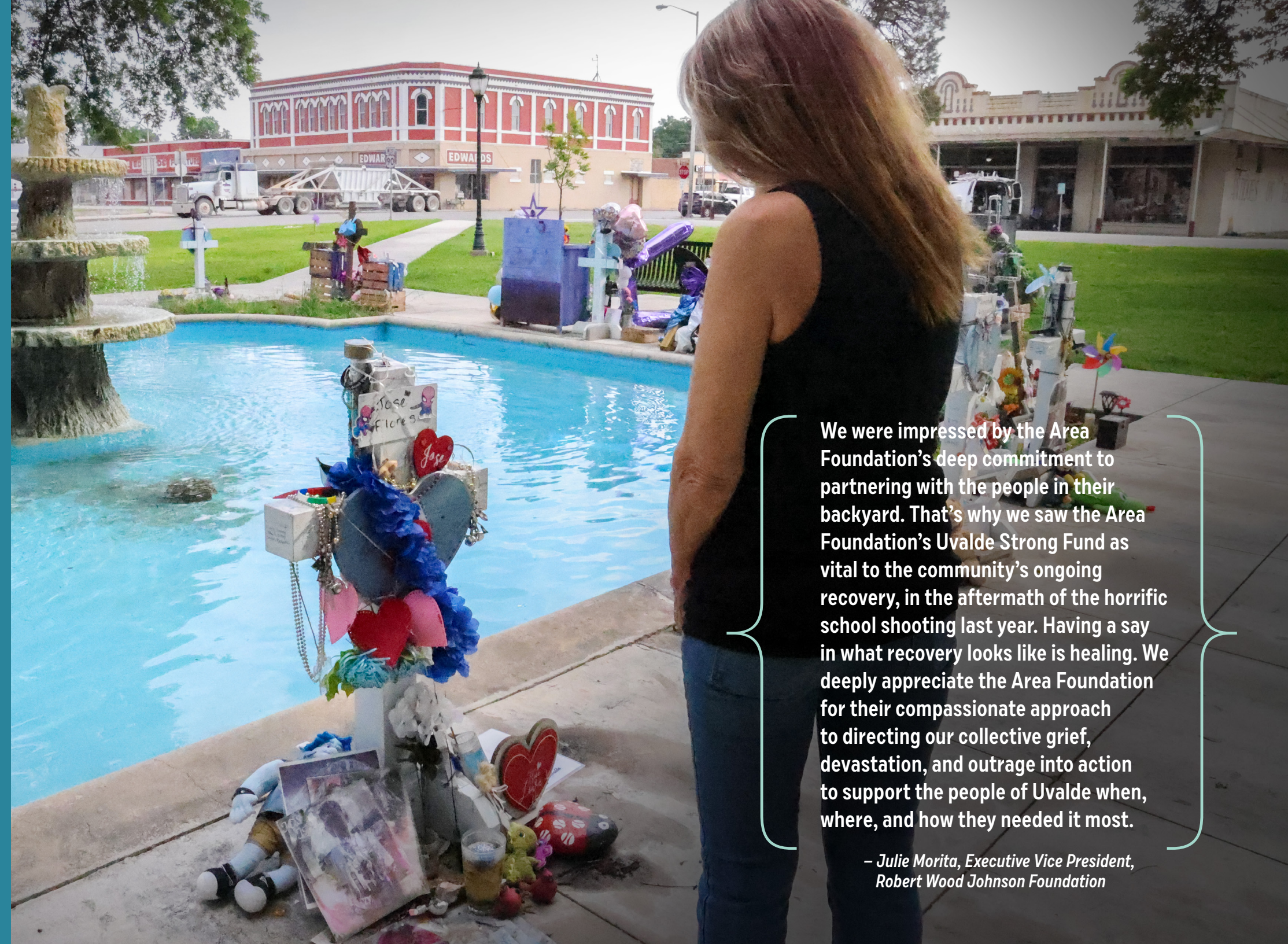
The Uvalde Strong Fund was specifically designated to distribute grants to nonprofits who would provide ongoing

services to the Uvalde community for years.

In the first year, the Uvalde Strong Fund received roughly \$1.69 million. Donations came in from all 50 states, the U.S. territory of Guam and as far as Australia, Brazil, Canada, Great Britain, Israel, Italy, and Hong Kong.

So far, nearly \$500,000 has been granted to nonprofits that provide school programs, mental health services, community programming, and family support in Uvalde.

The Uvalde Strong Fund is still accepting donations as long-term needs such as mental health care continue for years after this type of tragedy.



We were impressed by the Area Foundation’s deep commitment to partnering with the people in their backyard. That’s why we saw the Area Foundation’s Uvalde Strong Fund as vital to the community’s ongoing recovery, in the aftermath of the horrific school shooting last year. Having a say in what recovery looks like is healing. We deeply appreciate the Area Foundation for their compassionate approach to directing our collective grief, devastation, and outrage into action to support the people of Uvalde when, where, and how they needed it most.

— Julie Morita, Executive Vice President,  
Robert Wood Johnson Foundation



# MULTIPLE OPTIONS.

**For those who give and those  
who receive, flexibility matters.**

We have multiple ways of funding the causes donors care about. A cash gift is not always possible. A large gift is not always possible. We work with you to craft unique plans that fit your resources and philanthropic goals.

For the Area Foundation grant recipients, we offer support that lets nonprofits apply funds where they’re needed the most, which is often for operations. Multi-year grants allow nonprofits to build and sustain innovative programs knowing they have solid fiscal support.

*To learn more about all the ways you can give, visit [www.saafofn.org/giving](http://www.saafofn.org/giving).*



**RANDELL DRUM**

**Better ways to give.**

I’ve had a good adult life — being a university professor, consultant, and author; living part-time in Denmark for 20 years; retiring at 54, and regularly traveling internationally to about 90 countries.

It’s a far cry from my poor childhood. I remember my parents sitting together every two weeks. My father would pull a piece of paper from his wallet with two lists of bills to be paid — the first of the month on one side and the middle of the month on the other side. After going through the list, they would discuss other needed immediate expenses — clothing, school supplies, household items, etc. What was left of the money became my mother’s budget for our food for the next two weeks. Because of that process, I overcompensated later in life when it came to financial planning, especially in terms of saving and investing.

Federal IRS rules allow up to \$100,000 a year to be donated from an IRA to nonprofit organizations without paying income taxes. For years, I had been supporting local nonprofits with income left after having paid taxes. My personal investments and my IRA were with Vanguard, so I first checked out Vanguard Charitable. But I wanted to support some local small organizations, and the minimum amounts Vanguard specified per organization were too high.

Then I thought of the San Antonio Area Foundation. It provided the perfect opportunity for me. It’s local, it allows smaller donations (as low as \$250), and it is a nonprofit itself, which means I can donate to it and let the Area Foundation funnel my donations to my charities. I set up a Designated Fund for local nonprofit news and entertainment organizations.

The Area Foundation allows me to file a plan every three years designating which charities are to get funding year-by-year and how much. It is such an easy way to support all my charities that I have also revised my will and beneficiary designations so that my estate will go into my fund at the Area Foundation when I die, allowing my chosen charities (and similar ones) to continue to receive support in perpetuity after my death. I’m also in the process of donating a former rental property that I own to the Area Foundation to add even more money to my fund.

The staff at the Area Foundation have treated me like family even though I am “small fry” in terms of my contribution size. I am regularly invited to donor events to learn up-close about causes and nonprofits they support. During the past year, these have included trips such as Lightscape at the San Antonio Botanical Garden at Christmas, a Fiesta luncheon including a boat trip on the River Walk and a reception at the gallery of an artist who is being funded to do work with school children.

**I would highly recommend that you consider choosing to donate through the San Antonio Area Foundation. It’s a friendly one-stop organization for giving. A gift through the Area Foundation can go toward the many wonderful local projects it supports directly, but there is the option of a personally tailored plan to assure that your gifts go exactly where you want them to be sent.**

If, like me, you want to donate unneeded retirement fund money while you are still living, keep in mind that the Area Foundation can advise you how to convert a 401K or a 403B retirement fund into an IRA allowing your withdrawals to be sent directly to them tax-free. Through this process, you will be providing a greater amount of impact on the community than just personally giving directly to charities — the best part is that the Area Foundation does all the work for you!



**MARK MENJIVAR**

**Better ways to receive.**

Young San Antonians are benefiting from the arts in the creation of meaningful monuments and musical training with counseling as part of two programs funded by recent Artist Fellowship grants from the Area Foundation.

At the Centers for Applied Science and Technology (CAST), the grant funds the “Monuments” project to connect contemporary art to contemporary issues in the community.

The CAST program consists of five schools working with three area school districts in a project-based learning environment.

The project consisted of helping students think about the history of monuments in our country and then create their own monuments for someone meaningful in their lives.

The goal was to help students think about power and presence in their community and to provide a pathway for them to honor those they love and respect.

**To have multiple-year support for a project is HUGE. It meant that I could lean deeper into the work knowing it was going to be supported. And this allows new things to happen and relationships to build over time. Local support for local projects like “Monuments” make connections and bring change in so many ways.**

*Mark Menjivar is a San Antonio based artist and Associate Professor in the School of Art and Design at Texas State University.*



# ADDING CAPACITY FOR SUSTAINED SOLUTIONS

Supporting and sustaining nonprofits is a critical part of the Area Foundation's efforts to strengthen our community. In addition to our grantmaking, investment, and endowment services, and leadership on key community-wide initiatives, the Area Foundation offers nonprofits a range of capacity-building programs, training, and resources.



73

PROFESSIONAL  
DEVELOPMENT  
CLASSES IN 2022

1,821

PEOPLE TOOK  
CLASSES  
IN 2022

235

NONPROFIT  
ORGANIZATIONS  
SIGNED UP  
IN 2022

## SOLVING FOR DIVISION THROUGH LEADERSHIP

The second-ever class of the San Antonio Equity Fellowship Program was welcomed in 2022.

The San Antonio Equity Fellowship is a six-month transformational leadership program focused on bringing together leaders of marginalized communities committed to constructively altering societal conditions toward fuller justice and equity for all.

The SA Equity Fellowship will result in strengthened leadership for community impact, increased cross-cultural understanding, bolstered community collaboration to address pressing social issues, and a network of diverse leaders who will be able to call upon each other in the future.

*To learn more about the San Antonio Equity Fellowship Program, visit [www.saafdn.org](http://www.saafdn.org).*

The San Antonio Equity Fellowship is designed to create a cadre of passionate, transformational leaders committed to equity, social justice, and cross-cultural collaboration that will benefit all citizens of San Antonio.

—Carol Rodriguez





# GIVING TO A GREATER DEGREE

The Area Foundation awards over \$5 million in scholarships to students each year (\$7.7 million in 2022). This is a vital piece of the puzzle for so many young people who have the talent, determination, and work ethic to continue their education but lack the resources. Choice or a voice for so many in low-income communities is often unequal. Funding scholarships is one way to bridge that educational gap.

**“As a personal recipient of a scholarship, I can tell you firsthand the substantial impact it made in my life. What a privilege to have a hand in providing this opportunity to San Antonio students this season, and for years to come.”**

*– Rey Saldana, former City of San Antonio councilman & current President & CEO of Communities in Schools.*

**“I feel strongly that education is one of our huge change agents. One of the things I learned about scholarships is that they need to be replenished. If not, they can eventually run dry. As a former recipient and now as a donor, I think this is an appropriate way for me to help pay it forward.”**

*– Lissa Martinez, investor and entrepreneur*



## Legacy Scholarship Program

Founded in 2021 by an anonymous donor with a vision, the San Antonio Area Foundation’s Legacy Scholarship program awarded its inaugural class of recipients in 2022, with 50 students in Bexar and Webb counties being awarded with \$40,000 each after a competitive application and selection process.

**“The Area Foundation’s extensive experience, knowledgeable staff, and authentic commitment to upholding donor intent grant us confidence in their ability to manage complex philanthropic programs.”**

*– Argent trust, financial partner*



**ROSEMARY JASSO**

**My parents were deprived of a formal education due to social and economic circumstances. The Mary and Rodolfo Scholarship Fund honors both of them for the sacrifices they made to educate our family.**

At one point towards the end of my second year in college, I needed help to pay for tuition. I asked my father to ask his employer to lend me the money to cover the cost of my remaining six academic hours.

Even though the employer is an educated person, his immediate response was to question whether he would be reimbursed. When I heard his comment, I pledged that if I ever had the means, I would support young people like me who needed help to further their education.

When I had the means, I discussed my dream with my sister who worked with nonprofit organizations. She gave me several leads which I researched. My final decision was to go with the Area Foundation because they would help me set up the scholarship fund exactly how I wanted it. They guided me step by step and I was able to set up the fund to fulfill my dream.

**I have been very pleased with the San Antonio Area Foundation, and I have always recommended it to friends who have shown any interest in giving back to the community.**

*To learn more about opening an Area Foundation scholarship fund, visit [www.saafdn.org/scholarships](http://www.saafdn.org/scholarships).*



The San Antonio Area Foundation is proud to be the philanthropic partner you can trust to multiply the impact of your gift and balance the equation for those who need it most.

**Thank you for being a part of the solution.**



[saafdn.org/giving](https://saafdn.org/giving)

The San Antonio Area Foundation (SAAFdn) has served as the city's most trusted and impactful philanthropic partner for nearly 60 years, growing to become one of the top 20 community foundations in the nation. The Area Foundation strives to be our region's most trusted and impactful philanthropic partner, working to close opportunity gaps for those who need it most. The Area Foundation manages more than 500 charitable funds totaling over \$1 billion in assets and serves hundreds of nonprofit organizations every year — grantmaking exceeded \$57 million in 2022, including \$7.7 million in college scholarships. In all, the Area Foundation has awarded more than \$750 million to community nonprofits since it was founded in 1964. [Learn more at saafdn.org](https://saafdn.org).



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