



Foundations of Sharp HealthCare Endowment Report



Fiscal Years

2021 to 2025

With gratitude

At the heart of every endowment gift is a story — of vision, of values, of generosity that extends beyond a single moment in time.

The story of Sharp HealthCare has been written by people like you — people who combined vision with generosity to create enduring impact. People who saw beyond today and gave for tomorrow. People who believed in possibility and invested with purpose.

That is the power of philanthropy.

I'm honored to share this report with you, which highlights our endowment activity over the last several years. Your support is not only a thoughtful investment in our mission — it's a lasting legacy that continues to touch lives year after year.

You are shaping the future of health care in San Diego in deeply meaningful ways. Thank you for your trust, your partnership and your belief in what we can achieve together.

With sincere gratitude,



Bill Littlejohn
Senior Vice President and CEO
Foundations of Sharp HealthCare





Endowment at a glance

What is an endowment?

An endowment is a special fund in which the principal is held in perpetuity and the interest or a portion of it is spent as directed by the donor or the organization's board of directors.

At Sharp a named endowment fund may be established with a minimum initial investment of \$100,000. Our endowment portfolio consists of 68 separate funds including donor-restricted endowment funds and funds designated by the board of directors of Sharp's affiliated foundations to function as endowments.

Sharp endowments are used to invest in our people, advance care, support patients and their loved ones and sustain organizational excellence.

How is the endowment managed?

Sharp's endowment is managed with a long-term view to ensure growth, stability and alignment with donor intent. Investment decisions are made by a trusted investment firm and overseen by the Foundations' finance subcommittees, who provide strategic guidance and accountability. The investment direction for the endowment is designed to meet three objectives:

- Preserve the real value of the assets against inflation
- Provide income for programs at a sustainable rate, avoiding year-to-year declines which would disrupt the spending plan
- Provide growth in the income stream that will keep pace with inflation

What is the payout process?

The endowment payout—the amount that can be invested—is four percent (4%) of the actual earnings (interest, dividends and realized gains) based on the cash balance in each endowment fund's permanently restricted, board-designated and residual earning accounts. If the earnings in the designated period are less than four percent (4%), each endowment fund will receive the actual earnings.

Disbursements from endowed funds are administered by Foundation staff leadership in collaboration with designated fund managers.

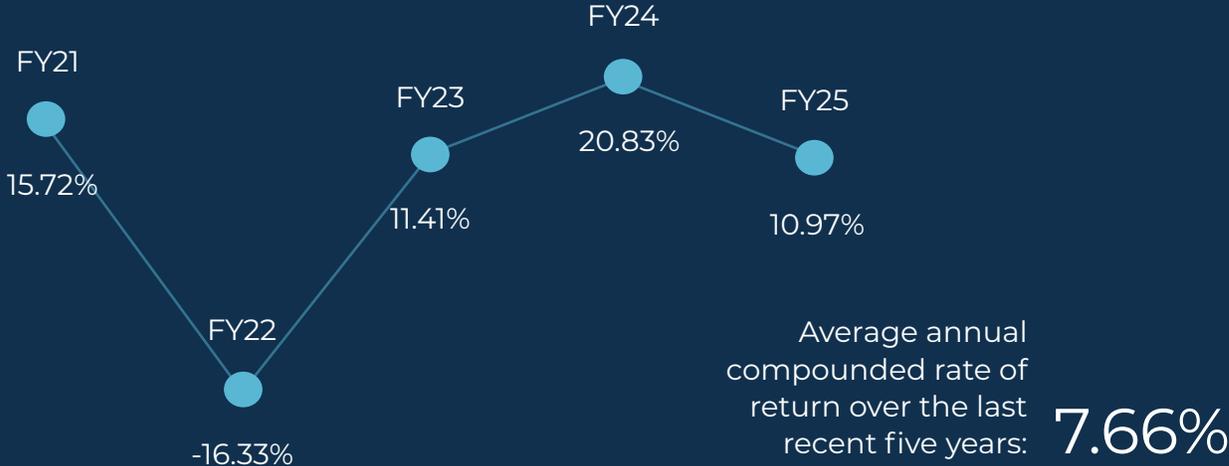
Together, they ensure that every dollar is spent responsibly and in accordance with the purpose of each gift.



Endowment dashboard

Market performance

Market Value as of September 30, 2025: **\$52,848,356**



Endowment growth in millions

Investment earnings Principal



As physicians, many of us are called to care for people at their most fragile – and often, most meaningful moments. In those times, it's helpful to know that we're not alone.

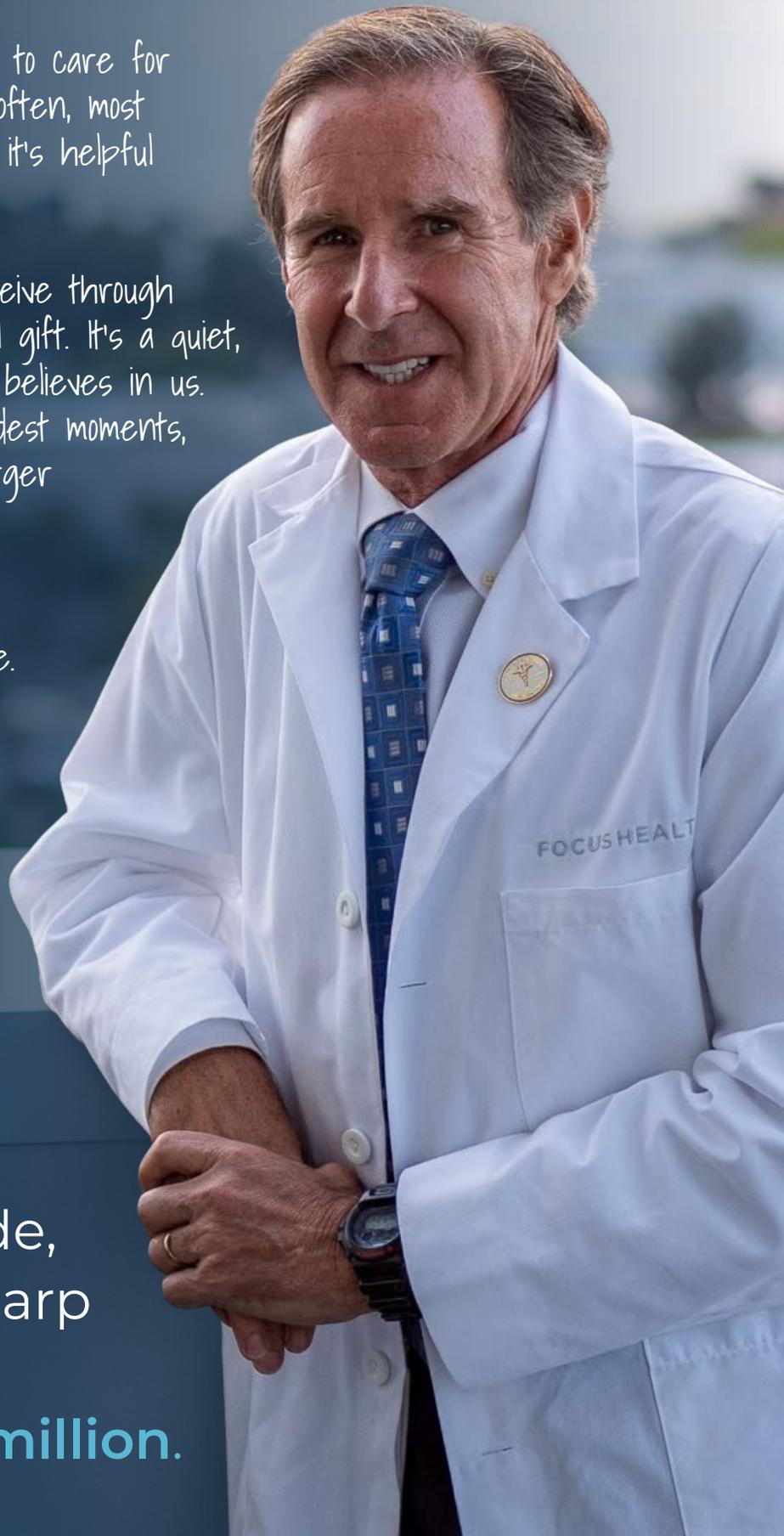
For caregivers, the support we receive through endowments is more than a financial gift. It's a quiet, steady reminder that our community believes in us. It reminds us that even in the hardest moments, we are surrounded by something larger than ourselves.

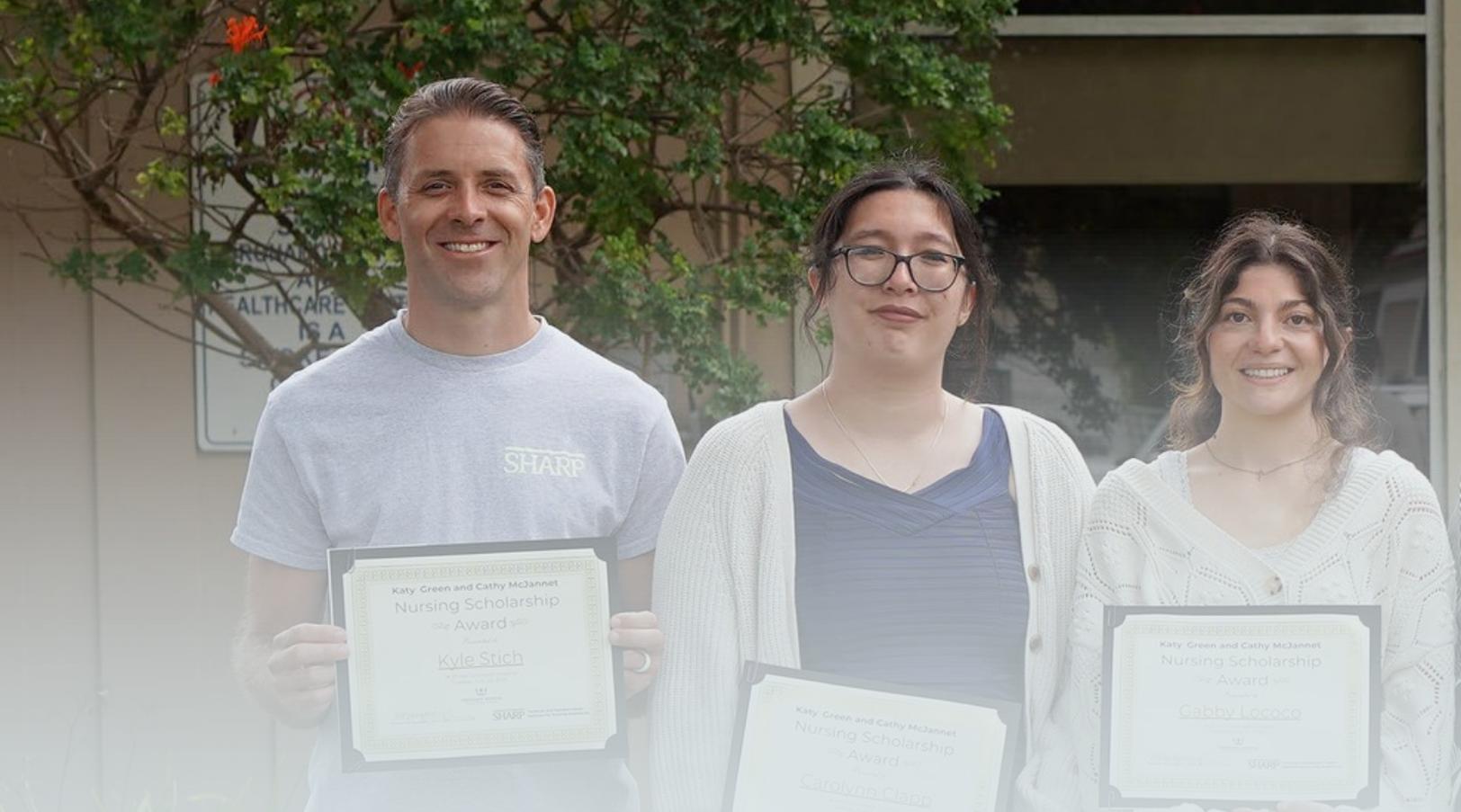
Your generosity gives us more than resources – it gives us reassurance. Thank you for the partnership and hope your gift continues to bring.

Dr. Roth

Kenneth Roth, MD
Medical Director for Philanthropy
Foundations of Sharp HealthCare

Over the last decade, endowments at Sharp have **grown from \$19 million to \$53 million.**





The impact of endowed funds

Endowed gifts have shaped every corner of Sharp HealthCare and touch the lives of patients, loved ones and caregivers. These funds grow over time — and so does their impact.

Investing in our people

Endowment distributions provide scholarships to nurses and continuing education for caregivers at our hospitals and medical centers. These investments strengthen our workforce, create opportunities and prepare the next generation of health care leaders.

“Going to nursing school is the best decision I’ve ever made, and the scholarship has significantly alleviated the financial burden so I can focus on continuing my education.”

- Ani Harter, RN, BLS, CNS
Sharp Grossmont Hospital

Advancing care

Endowed funds bring the latest medical technology and innovative techniques to operating suites, exam rooms and the bedside — ensuring that care is safer, faster and more precise than ever before.



Supporting patients and loved ones

Endowment support helps provide moments of comfort, connection and dignity — small yet powerful gestures that patients and their families remember long after their visit.

Sustaining excellence

Endowed gifts give Sharp the flexibility to meet emerging needs and act on new opportunities. These gifts ensure we can deliver exceptional care — today and for generations to come.

“*The future is bright and the opportunity is vast. We’re all in this together to build a better Sharp.*”

— Carmen Spalding, PhD, RN, CHSE-A
Brown Simulation Center

Thank you

I truly believe that Sharp HealthCare is one of our community's greatest assets, as we care for 1 in 3 San Diegans each year. I also believe that it takes all of us — caregivers, volunteers and donors — to continue providing The Sharp Experience to those we serve each and every day.

Yet, we are always looking forward — toward a future where access is more attainable, healing is shaped by innovation and care never loses that special human touch.

And the truth is — endowment gifts like yours are essential to creating that future.

Endowment gifts allow us to plan, not just for today, but for generations to come. They give us confidence that we can care for all our patients, from the tiniest patients in the NICU to those at end-of-life and so many stages in between. We can provide scholarships for caregivers, purchase advanced technology and participate in cutting-edge research.

Endowment gifts like yours allow us to dream bigger.

Your enduring generosity helps us move forward with more confidence and a greater sense of possibility.

With appreciation,



Chris Howard
President and CEO
Sharp HealthCare





Endowments at Sharp HealthCare create opportunities, inspire progress and provide comfort when it matters most.

Coronado Hospital Foundation
Grossmont Hospital Foundation
Sharp HealthCare Foundation



sharp.com/give