

Strategic Plan Goals, 2011-2015

We are pleased to share this overview of the SDG Strategic Plan. It is a partial list, just to give you a sense of what we are up to. Please let us know if you have any questions or comments.

Mission: to connect, educate, develop and inspire a diverse group of foundations and corporations to stimulate effective philanthropy in the San Diego region.

Vision: to build a vibrant, effective and growing philanthropic community that improves the quality of life in the San Diego region.

Values: Excellence, Service, Collaboration, Celebration, Inclusiveness, Integrity

SDG's role:

Our unique contribution to members and to philanthropy in San Diego County:

- *Connecting grantmakers to each other*
- *Connecting grantmakers to knowledge and best practices*
- *Facilitating collaboration among funders and across sectors*
- *Ensuring that organized philanthropy and members' work are appropriately visible with key leaders*
- *Leveraging local philanthropy to help bring more resources to our region*

Programs and Services

Enhance member education and support through a comprehensive, responsive and innovative program/member services plan that serves the needs of the many different SDG member types.

- Develop and deliver a program curriculum (including the Annual Conference) focused on effective philanthropy, member interests and the needs of our community:
 - *Continue diversity/inclusion/equity-related programming*
 - *Focus on government and philanthropy issues and awareness*
 - *Focus on poverty and economic challenges for people, communities, nonprofits*
 - *Add special programs for trustee leaders and seasoned grantmakers*
 - *Meet specific needs of family and corporate members*
- Expand "star quality" speakers and include networking opportunities

Membership Development

Promote the value of SDG membership in the philanthropic community by implementing a member retention and recruitment plan that increases the number of members, achieves our revenue goals, and strengthens the network for our current membership.

- Engage and recruit more of the largest private foundations in San Diego
- Engage and recruit small to medium-sized corporate giving programs
- Examine ways for SDG to contribute to the development of newer, diverse philanthropy

Government Relations and Policy Work

Nurture relationships with local, state and national policymakers in order to establish beneficial public/private partnerships to solve community problems, as well as to maintain a favorable regulatory environment for philanthropy.

- Increase awareness and understanding of philanthropy through a coordinated advocacy outreach plan including:
 - *San Diego Giving Stories*
 - *One-on-one meetings with public sector officials and their staffs*
 - *Invitations to local public sector representatives to attend SDG gatherings*
 - *Coordinated outreach to key state and federal level officials with other regional associations*
- Involve local public sector representatives in SDG member collaborations as appropriate
- Educate SDG members on funding and engaging in advocacy

Communications

Position San Diego Grantmakers as a valuable resource and convener for organized philanthropy in the San Diego region—among existing members, prospective members and other external stakeholders.

- Increase awareness of SDG as a:
 - *source of philanthropic information, research, technology and tools*
 - *facilitator of grantmaker networking and collaboration*
 - *neutral convener of cross-sectoral stakeholders working with philanthropy to address community needs*
 - *voice and advocate for philanthropy*

Collaborations and Working Groups

Support the SDG member collaborations in a way that maximizes their impact in the community and members' satisfaction with their experience.

- Support active SDG member collaborations: Homelessness Working Group, Coming Home to Stay, Child Welfare Funders, San Diego Neighborhood Funders, and San Diego Workforce Funders Collaborative
- Support new member collaborations and learning groups based on member interest and community needs (e.g. Military Families, Education, Environment, Arts and Culture)
- Choose a few cross-sector issues in which to play a leadership or convening role involving key constituencies
- Use SDG's collaborative efforts to attract outside resources to San Diego

Governance & Internal Operations

Ensure that SDG meets the highest standards of governance for the nonprofit sector, and that SDG runs professionally and efficiently as a growing organization.

- Establish and follow appropriate policies and procedures concerning succession, governance, insurance, finances, and personnel
- Conduct annual board self-assessment
- Expand sources of financial support for SDG by improving the sponsorship and grants strategy
- Utilize the new membership database fully to enhance efficient operations and member services