

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

1. PROGRAM PLANNING and MEMBER SERVICES

Evaluate and improve member programming through the development and implementation of a comprehensive program/member services plan.

- Develop and deliver high quality education curriculum (including Annual Conference) based on member interests, focused on the needs of the economic downturn, with majority of sessions offered in conjunction with partner organizations.
- Create improved evaluation criteria and system to ascertain impact and member satisfaction.
- Respond to member inquiries and research requests in a timely manner.

2. MEMBERSHIP DEVELOPMENT

Formalize a member retention and recruitment plan that enhances and expands our ability to support philanthropic organizations in San Diego.

- Conduct membership renewals with 90% retention rate.
- Design a formal member recruitment process that involves the board.
- Meet with SDG members that do not regularly attend programs.
- Identify compelling stories about the impact of SDG membership on effective grantmaking.

3. POLICY

Nurture relationships with local, state and national policy makers for better visibility, potential partnerships and to enhance their understanding of philanthropy.

- Meet with selected national, state and county legislators to educate them about SD philanthropy.
- Participate in Foundations on the Hill in Washington DC, sponsored by the Council on Foundations.
- Work with other California regional associations on developing relationships and presence in Sacramento.
- Develop protocol for responding to critical and time-sensitive policy issues.
- Roll out "Snapshots of Philanthropy" email campaign to legislators and other influential San Diegans to proactively communicate the impact of philanthropy in our region.

4. TECHNOLOGY and COMMUNICATIONS

Determine how best to utilize technology and other communication tools to better support members and to communicate more effectively with external audiences.

Member Communication

- Test social networking and other solutions to better connect members through technology.

- Publish top quality and relevant member e-newsletters to inform and educate on grantmaking and philanthropy.
- Assess and improve protocol/frequency of member communications.
- Acquire a new member database for enhanced responsiveness.

External Communication

- Work with members and others to share the story of how philanthropic organizations and individuals can step up during the recession to inspire more and higher-impact giving.
- Develop a comprehensive communications plan and SDG re-branding for 2010/2011.
- As appropriate, issue op eds, write blog entries and do speaking engagements about philanthropy.

5. COLLABORATIONS/WORKING GROUPS

- **Child Welfare Funders:** Implement joint funding strategies for prevention/early intervention and aging out youth.
- **Coming Home to Stay (prisoner reentry):** Launch and monitor pilot project to provide mentoring and coordination of services in City Heights and southeast San Diego.
- **Homelessness Working Group:** Serve as an incubator for a regional plan to end family/episodic homelessness.
- **SD Workforce Funders Collaborative:** Support and expand the 2008 grants and expand the funds available for further workforce projects.
- **San Diego Neighborhood Funders:** Continue and expand collaborative funding to support resident-led community building efforts in and around The Village at Market Creek (located in southeastern San Diego).

6. GOVERNANCE

Ensure that SDG meets the highest standards of governance.

- Finalize bylaws revisions.
- Conduct board self-assessment.
- Support all SDG committees: Governance, Finance, Annual Conference, Audit, Programs, Membership, Strategic Communications and Public Policy.
- Refine board/committee development plan with focus on expanding diversity.

7. INTERNAL OPERATIONS

Develop infrastructure so we can better support members.

- Develop non-dues related revenue and other forms of additional support or sponsorship to help ensure SDG's financial viability.
- Conduct annual financial review.
- Recruit, hire and train 1–3 volunteers/interns for additional staff support.



SDG VISION AND MISSION

Our **VISION** is to build a vibrant, effective and growing philanthropic community that improves the quality of life in the San Diego region.

Our **MISSION** is to connect, educate, develop, and inspire a diverse group of foundations and corporations to stimulate effective philanthropy in the San Diego region.

Guiding Principles for SDG Members

1. Purpose
2. Transparency
3. Stewardship
4. Responsible Governance
5. Accountability
6. Respect
7. Diversity
8. Equity

VALUES

Excellence

In all of our work, we reflect a commitment to excellence.

Service

We value our members by providing services that are practical, informed, stimulating and relevant.

Collaboration

We support members working together to address community needs.

Celebration

We celebrate the joy and satisfaction born out of compassionate and results-driven philanthropy that improve the many communities of the San Diego region.

Inclusiveness

We believe in the rich diversity of the San Diego grantmaking community and the San Diego region in general, and will promote inclusiveness in the way we work.

Integrity

We value and promote ethical grantmaking practices.

Strategic Framework

