

## inspiration

### MEMBERSHIP HIGHLIGHTS

San Diego Grantmakers is committed to enriching and enhancing the grantmaking in San Diego's philanthropic sector. In 2003-04 San Diego Grantmakers hosted 30+ programs annually with over 500 grantmaking participants. These fundamental programs increase effectiveness in grantmaking, enable grantmakers to learn from their peers, open the doors to co-funding opportunities and collaborations, and help keep abreast the challenges in the San Diego region. SDG is also committed to providing its members with communication and services representing the most up to date and pertinent information within the foundation sector. As a resource to our members, we are passionately loyal to the challenge of strengthening philanthropy in San Diego and appreciate the value of relationships and the impact of working together.

## innovation

### PROGRAM HIGHLIGHTS

- Annual Conference—  
Grantmaking for Impact: How We Do It Matters
- Grantmaking 101 Series
- Distinguished Speaker Series
- Commitment to Systemic Change:  
SDG's Working Group on Homelessness
- Responding to Disasters
- Site Visits—San Diego's Parks, Wetlands, and Bays;  
as well as Blurred Borders: Touring Tijuana

## impact

### SERVICES

- Training and technical assistance
- Research and referrals
- Over 450 templates and documents
- A library full of useful literature
- Web, conference call, and computer services
- Discounts to professional journals

## intelligence

### COMMUNICATION

- SDG Listserv
- [www.SDGrantmakers.org](http://www.SDGrantmakers.org)
- *Philanthropy Link* newsletter
- *SDG Corporate Link* and *Family Ties*
- SDG Member Directory



## San Diego Grantmakers

OUR **Vision** IS TO BUILD A STRONG  
PHILANTHROPIC COMMUNITY STRENGTHENED  
BY OUR VIBRANT LEADERSHIP.

OUR **Mission** IS TO CONNECT, INFORM,  
DEVELOP, AND INSPIRE A DIVERSE GROUP  
OF FOUNDATIONS AND CORPORATIONS TO  
STIMULATE EFFECTIVE PHILANTHROPY IN  
THE **SAN DIEGO** REGION.



Biennial Report  
2003-2004

impact  
integrity  
investment  
involvement  
inspiration  
innovation  
initiative  
inclusive  
intention  
intelligence  
it matters

## intention

This year San Diego Grantmakers is celebrating its 6<sup>th</sup> year anniversary. Preparing for an exciting year, the Board of Directors undertook a series of “strategic conversations” to discuss our future. We conducted surveys and interviews and reviewed data from regional associations of grantmakers in other parts of the country where philanthropy is creating authentic change.

To remain in sync with your work and to strengthen philanthropy in San Diego, the board developed a new mission: **to connect, inform, develop, and inspire a diverse group of foundations and corporations in order to stimulate effective philanthropy in the San Diego region.** With this in mind, SDG ardently strives to provide the most informative and relevant programs and services presenting members with opportunities to build skills, network, and collaborate. Our members’ needs, the essential motivation for SDG, dictate our goals as we continuously reflect on and revise our activities concurrent with the evolution of San Diego grantmaking.

Our 80-member organizations seek out and utilize other SDG resources as well, such as newsletters, our website, a membership directory, discounts to professional journals, technical assistance, and a library of sample documents and useful literature. Furthermore, in responding to the requests of our members’ future needs, SDG has committed to further exploring working groups, public policy, and strengthening our community and media relations.

While looking to the future, we also evaluate the road we took to get here—we cannot forget about our invaluable board and committees of volunteers and the respective time and energy dedicated to ensure the success of SDG. Within our endeavors, each one of us plays an integral role in impacting San Diego grantmaking, and in the past six years, working collectively, our growth has been immeasurable. On behalf of SDG, we thank all of our members and friends who support us and share in our vision—now and in the future.

## impact

### STATEMENT OF INCOME & EXPENSES

Operating Budget	2003	2004
<b>REVENUE</b>		
Membership Support	114,500	129,005
Additional Support	19,000	11,600
Program Sponsorships & Fees	2,416	21,920
Grants — Programs	16,500	2,300
Grants — Homeless Working Group		15,500
Grants — COF ’05 Host Committee		111,600
Interest Income	1,634	3,222
In-kind Revenue — San Diego National Bank	13,800	13,800
<b>TOTAL</b>	<b>\$167,850</b>	<b>\$308,947</b>

### EXPENSES

Annual Conference & Distinguished Speaker		5,664
Educational Programs	17,649	10,307
Homeless Working Group		11,937
COF ’05 Host Committee		29,607
Personnel	105,395	115,173
Newsletter & Communications	7,507	7,493
Web Development & Maintenance	5,005	5,690
Supplies	1,889	2,635
Equipment & Maintenance	1,022	1,224
Insurance	1,574	1,885
Professional Fees — Consultants	7,370	8,063
Professional Development	300	460
Conferences	3,788	3,562
Travel	1,803	1,481
Meetings	2,611	1,580
Books, Dues & Subscriptions	2,047	1,151
Rent & Utilities	14,376	14,942
Forum of Regional Associations	2,550	2,020
Philanthropy Day Sponsorship	2,500	2,500
<b>TOTAL</b>	<b>\$177,386</b>	<b>\$227,374</b>

## initiative

### 2003 - 2005

#### BOARD OF DIRECTORS

**Robert Kelly, Chair 2005**  
The San Diego Foundation

**Ruth Lyn Riedel, Ph.D., Chair 2003 - 2004**  
Alliance Healthcare Foundation

**\*\*Marjory Kaplan, Vice-Chair 2003**  
Jewish Community Foundation

**Phil White, Vice-Chair 2004 - 2005**  
The Hamilton-White Foundation

**Fred Baranowski, Treasurer 2004 - 2005**  
United Way of San Diego

**Gregory Hall, Treasurer 2005**  
The California Endowment

**Allison Kelly, Secretary 2005**  
QUALCOMM Incorporated

**Al Panico, Secretary 2003 - 2005**  
Waitt Family Foundation

**Janine Mason Barone**  
Fieldstone Foundation

**Pete Ellsworth**  
Legler Benbough Foundation

**\*Murray Galinson**  
Galinson Family Foundation

**Valerie Jacobs**  
Jacobs Family Foundation

**Tim McCarthy**  
McCarthy Family Foundation

**Judy McDonald**  
The Parker Foundation

**Joanne Pastula**  
The Thomas C. Ackerman Foundation

**Kelly Prasser**  
Sempra Energy

**\*\*Paul Thompson**  
Callaway Golf Company Foundation

**Jan Tuttleman**  
Jewish Community Foundation

\*Retired from SDG Board 2003  
\*\*Retired from SDG Board 2004

## involvement

### MEMBERS

#### LEADERSHIP COUNCIL

Alliance Healthcare Foundation  
The California Endowment  
Callaway Golf Company Foundation  
The Legler Benbough Foundation  
The Parker Foundation  
QUALCOMM Incorporated  
The San Diego Foundation  
San Diego National Bank  
Sempra Energy  
Waitt Family Foundation  
Washington Mutual

Applied Micro Circuits  
Benson Family Foundation  
Boys and Girls Foundation  
The Burnham Foundation  
The California Wellness Foundation  
Capital One Auto Finance  
Casey Family Programs  
Change A Life Foundation  
Community Technology Foundation of California  
Community Youth Foundation of the JCF  
Cox Communications  
Cush Automotive Charitable Foundation  
DeFalco Family Foundation  
Earth Share of California  
Family Care Foundation  
Fieldstone Foundation

First 5 Commission of San Diego  
Foundation for College Christian Leaders  
Fundación Internacional de la Comunidad  
The Galinson Family Foundation  
Gateway  
The Hamilton-White Foundation  
Hewlett Packard  
The Hitachi Foundation  
International Community Foundation  
Invitrogen  
J.W. Sefton Foundation  
Jacobs Family Foundation  
The James Irvine Foundation  
Jewish Community Foundation  
Jewish Women’s Foundation of San Diego  
Junior Seau Foundation  
Kaiser Permanente  
Kenneth A. Picerne Foundation  
Lawrence Welk Family Foundation  
Mandell Weiss Charitable Trust  
McCarthy Family Foundation

Moxie Foundation  
Nokia  
Northern Trust Bank of California  
Oak Tree Philanthropic Foundation  
The Patricia & Christopher Weil Family Foundation  
Pulido Walker Foundation  
Rancho Santa Fe Foundation  
The Rice Family Foundation  
Rolston Family Fund  
The Rose Foundation  
San Diego Commission for Arts & Culture  
San Diego County Bar Foundation  
San Diego County Medical Society Foundation  
San Diego Foundation for Change  
San Diego Human Dignity Foundation  
San Diego Social Venture Partners  
San Diego Workforce Partnership  
The Sanderson Family Foundation  
The Serenity Fund  
Starbucks Coffee Company  
The Synetic Foundation  
Szekely Family Foundation  
The Thomas C. Ackerman Foundation  
Time Warner Cable  
Toby Wells Foundation  
Tuttleman Family Foundation  
Union Bank of California Foundation  
United Way of San Diego  
Viejas Enterprises  
Viterbi Family Foundation  
Weingart-Price Fund  
Wells Fargo  
Wheatley Foundation  
William D. Lynch Foundation for Children  
William E. Schmidt Foundation  
Willis & Jane Fletcher Foundation

#### STAFF

Julie Holdaway  
Executive Director 2000 - 2005  
Nancy Jamison  
Executive Director 2005 -  
Ileana Ovalle  
Director of Funder Relations

#### SDG MEMBERSHIP

##### BREAKDOWN

Community Foundations: 9  
Corporate Foundations: 24  
Family Foundations: 29  
Independent Foundations: 16  
Other: 6