



## Our year in review – 2008

In 2008, San Diego Grantmakers...

- Offered **substantive and highly rated programs** on a wide variety of topics– including skill-building, best practices in philanthropy and community needs.
  - Some of the most popular based on member feedback were *Pass or Fail: San Diego County Report Card on Children and Families*, *Distinguished Speaker Luncheon: Paul Brest, President of the Hewlett Foundation* and *A Dialogue with Nick Macchione, The New Director of the San Diego County Health and Human Services*.
- Hosted **national experts in corporate giving** from the Committee Encouraging Corporate Philanthropy, Cone Inc, Boston College Center for Corporate Citizenship and the Association of Corporate Contribution Professionals.
- Convened the **Family Foundation Exchange** to explore issues of common interest in an intimate collegial setting. We also partnered with the National Center for Family Philanthropy to offer direct access to the Family Philanthropy Online Knowledge Center and Teleconference Series.
- With the able work of the **Annual Conference** Committee, led by Debbie Williams from the JW Sefton Foundation, put on the Annual Conference (*Mapping the Impact of San Diego Philanthropy*) and received rave reviews. The single most popular speaker in recent SDG history was Andy Goodman, who inspired us with his stories while teaching us how critical storytelling is in the work of funders.
- In partnership with the Council on Foundations, offered a one-day course in **Essential Skills and Strategies for Grantmakers**. This brought funders from San Diego and across the country together to get back to basics related to due diligence, site visits and best practices in the field.
- Created a **Diversity in Philanthropy** webpage, as well as programming with national thought leaders. In addition, our involvement in policy work increased considerably through statewide regional association efforts regarding **Assembly Bill 624**, which was aimed at requiring larger foundations to disclose the race and gender composition of their trustees, staff and grantees. With the support of the newly formed Strategic Communications and Public Policy Committee (headed by Sid Voorakkara of The California Endowment), we advocated in Sacramento on behalf of our members.

- Supported by funding from the Jewish Community Foundation, McCarthy Family Foundation, The Parker Foundation, The San Diego Foundation, United Way of San Diego County, and Washington Mutual, published the first benchmarking report on organized philanthropy in San Diego: ***The Grantmaking Report: Foundation and Corporate Giving in the San Diego Region***. The study was conducted by the USD Caster Family Center for Nonprofit Research and analyzed the nature of organized philanthropy in our region to help various stakeholders understand its strengths, challenges and opportunities. There was a successful launch event at USD with over 100 people present, and we received editorial and press coverage. Also, the report helped open doors for meetings with local legislators to better nurture relationships between government and local philanthropy.
- Partnered with Volunteer San Diego and the San Diego Business Journal to publish a special **Corporate Philanthropy supplement**. Designed to help small to medium-sized businesses get involved in corporate giving and volunteerism.
- Established the **SDG Guiding Principles**, providing guidance and inspiration for our members on how to be ethical, accountable and effective grantmakers. A special series of newsletters provided specific ideas on how to put the principles into practice.
- Through a **significant operating grant from The California Wellness Foundation** pursued a number of mission-critical member service goals. In addition to upgrading our computers we engaged Barbara Mandel Pache as our Funder Collaboration Consultant. In June 2009 she began to facilitate and thus expand the power of leveraged philanthropy in our **four health-related working groups**. Due to this support, these collaboratives are moving closer to achieving important outcomes.
  - **Homelessness Working Group**: convened a regional summit on trends in alleviating family homelessness with local legislators and national experts, and has recently partnered with SANDAG and local municipalities to identify ways to develop a comprehensive plan for ending family homelessness in San Diego.
  - **San Diego Workforce Development Collaborative**: issued their first Request for Proposal and made funding decisions together totaling over \$250,000 in the area of health and life sciences career preparation in underserved populations.
  - **Coming Home to Stay Project** (prisoner reentry): funded planning and implementation of a project in southeast San Diego and City Heights to coordinate service providers for the formerly incarcerated in order to ensure a reduction in recidivism. This project was developed based on deep input from both the formerly incarcerated and local providers.
  - **Child Welfare Funders**: sponsored a summit on best practices in child welfare from the state of California that led to better understanding of what works. They have engaged in discussion and learning that prepared them to sharpen their focus on prevention and early intervention of child abuse and the successful transition of aging out foster youth.

In other working group news, the **San Diego Neighborhood Funders** granted about \$500,000 to support resident-led efforts that foster civic engagement and resident voice, cultural understanding, community and family health education, youth development, and community asset building, including funding for the mini-grants program and endowment of the Neighborhood Unity Foundation. Learning agenda meetings provided deeper understanding of the issues of funded projects and future actions needed.

- Produced monthly **SDG newsletters** throughout the year: SDG Update, Corporate Link and Family Ties. These were recognized by members for helpfully capturing the latest news and trends in philanthropy, both locally and nationally.
- Engaged in a **Strategic Planning** process based on personal interviews with members and non members as well as an extensive member survey. The goals guiding our work are provided in the Overview of the SDG Strategic Work Plan. **We hope that you will take time to review it and let us know if you have ideas about how we can better serve you.**

### **A Special Note on the Economy**

As we all know, this is a time of great need in our country. Following a number of programs on how to effectively pursue giving in trying times in 2008, early in 2009 the Board and Advisory Board of SDG met to identify ways to support our members during the recession. This will be an evolving strategy, but some examples to date include:

- Hosting or co-hosting **events** on the economy including: *The Current Economic Storm: How Grantmakers Can Respond*; *Workshop for Funders: Strategic Restructuring for Nonprofit Organizations*; *What the New Economic Stimulus Package Means for California Grantmakers Webinar*; and *SDG Briefing: Economic Downturn Impacts on Health and Human Services*.
- Convening **SDG arts funders** in partnership with The San Diego Foundation and the San Diego Commission on Arts and Culture.
- Bringing together local cities to assist in the development of a coordinated, regional application for American Recovery and Reinvestment Act funding available to prevent **homelessness** through the Homelessness Working Group.
- Keeping funders **informed** on the status of the national economic stimulus package: for example, partnering on the USD program *Deciphering the Economic Stimulus Package and State Budget: What Nonprofits Need to Know and Do Next*.
- Gathering information on best practices, news and tips for grantmakers and their nonprofit partners for the **SDG Philanthropy and the Economy webpage**,
- Sending members short monthly **Philanthropy and the Economy newsletters** with highlighted economy-related topics (such as mergers/collaboration and the stimulus package).

More plans in this arena are in the works now-- please share any ideas you have!