



San Diego Grantmakers Update

Happy National Philanthropy Day!

Congrats to all of the [nominees](#), including SDG member [The Leqler Benbough Foundation](#). Kudos to all SDG members for YOUR philanthropy.

October/November 2008

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Special Economy Update

The economic downturn continues to have a deep impact. Keep an eye on your inboxes for more on this topic: SDG will be sending out a **survey** to members to find out how our community is responding, as well as a **special newsletter** relating to the economy next week. We are also convening members:

The Current Economic Storm: How Grantmakers Can Respond

December 4, 2008

9:00 am-11:00 am

Location: [United Way of San Diego County](#), 4699 Murphy Canyon Rd, San Diego, CA 92123

This is a challenging time for funders: dealing with a turbulent economy, unstable asset bases, a charitable sector with significantly diminished resources, and increased and changing needs in our community. Join SDG for this special, members-only breakfast roundtable to discuss, share and brainstorm responses to the myriad challenges (and possible opportunities) in front of

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us. In such critical times, tough decisions have to be made.

- What approaches should grantmakers take to adjust to their diminished assets?
- What actions can we take to help grantees sustain themselves?
- How can funders leverage and combine forces for wider impact?
- What kinds of non-financial resources can be brought to bear?
- What types of programs are most critical for funding right now?

This session will incorporate our work to date on this important topic through the [SDG Annual Conference sessions](#) and the SDG [Economy & Philanthropy website](#) ([contact us](#) if you need log-in info).

RSVP today: programs@sdgrantmakers.org

New Resource for SDG Members: KnowledgeBase



This resource contains a compilation of the best resources from among 32 regional associations and 4,000 grantmaking members across the country. Access to these materials is limited to members of regional associations.

[Click here](#) to access the KnowledgeBase (you will need to login--[contact us](#) if you need log-in info).

Member & Community Partner News

YOUR ORGANIZATION COULD BE FEATURED HERE! Don't forget to let SDG know what's new with you, from grantmaking to awards, events, and more. We want to share the good news about all of our members. To submit an item for the newsletter, email nancy@sdgrantmakers.org.

Welcome New SDG Staff Member: Christie Edwards started work as SDG's Administrative Coordinator in September. We're so pleased to have her on board!

Richard Kiy of the [International Community Foundation](#) wrote an [article](#) about border issues for Voice of San Diego.

[The Gary and Mary West Foundation](#) was mentioned in a [San Diego Union-Tribune article](#) for their support of a new charter school in Vista.

[The James Irvine Foundation](#) has announced twenty-eight third-quarter grants totaling \$10.5 million. [Click here](#) for more information.

The [Jewish Community Foundation](#) has a [new website](#).

Christy Wilson of the [Rancho Santa Fe Foundation](#) was profiled in a [Del Mar Times article](#).

[The San Diego County Bar Foundation](#) has awarded \$110,000 in grants to 10 local nonprofit groups in an effort to address legal needs among the region's neediest residents. [Click here](#) for the San Diego Union-Tribune article.

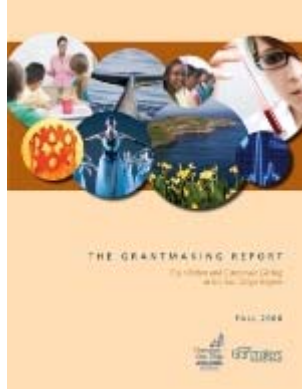
[The San Diego Foundation](#) has released an [update](#) to the October 2007 Community Needs Assessment Report. Also, [click here](#) for a related San Diego Union-Tribune article on fire donations.

Walter Philips and **Doug Perkins** of [SANDAN](#) penned a [guest commentary](#) (pdf) regarding the state budget and nonprofits in the San Diego Daily Transcript.

[The San Diego Women's Foundation](#) is currently accepting proposals in the field of Economic and Employment Development. The Grants Focus this year is to fund programs that help lower paid, lower skilled workers prepare for and move into higher paid, higher skilled jobs with the intent of strengthening the middle class in the San Diego region. All Grant applications must be submitted electronically no later than 5:00 pm, Wednesday, December 3, 2008.

[The San Marcos Community Foundation](#) celebrated its 20th anniversary with a special event on September 24. Since making its first grants in 1988, the Foundation has provided nearly one million dollars to non-profit organizations serving the residents of San Marcos.

Feedback on The Grantmaking Report's Findings



[San Diego Grantmakers](#) (SDG) and the [University of San Diego \(USD\) Caster Family Center for Nonprofit Research](#) released *The Grantmaking Report: Foundation and Corporate Giving in the San Diego Region*. [Click here](#) to view key findings and to download a copy of the full report.

The San Diego Union-Tribune ran an [article](#) about the major findings. On October 6, the Union-Tribune ran an [op-ed](#) by SDG Executive Director Nancy Jamison concerning the report's implications, which also ran in the San Diego Daily Transcript. **We want to hear YOUR feedback on the report's findings. Tell us what you think we can do in San Diego to increase and enhance effective philanthropy! Email report@sdgrantmakers.org.**

Forum of Regional Associations of Grantmakers Announcements

Alliance of Two Major Philanthropic Organizations Formed

We are pleased to inform you that the [Forum of Regional Associations of Grantmakers](#) and the [Council on Foundations](#), two of the largest membership organizations in philanthropy, have entered into an important and far-reaching strategic alliance to better serve the nation's foundations and other philanthropic donors. Nancy Jamison served on the national Strategic Planning Committee that recommended this approach and she is currently serving on the Search Committee for the new CEO of the Forum. [Click here](#) (pdf) for more information.

SCG Conference Next Week!

San Diego Grantmakers members are invited to attend the SCG conference next week:

[Southern California Grantmakers Annual Conference & Members' Meeting](#)

November 19, 2008
Los Angeles, CA

Washington Update

Post Election Teleconferences

[Arabella Advisors' teleconference series](#) will give family, institutional and corporate philanthropists an understanding of how the new president's policies may impact their philanthropic strategies. Calls will feature grant makers, policy experts, and a Democratic political representative, in

partnership with a leading grantmakers association.
Wednesday, November 12: Education
Wednesday, November 12: Global Development
Thursday, November 13: Environment
Friday, November 14: Poverty

Chronicle of Philanthropy: Charities Can Expect New Regulations and Increased Giving in an Obama Administration

[Click here](#) for the article.

Tax Extenders Bill Passes Congress and Signed by President; Includes IRA Rollover Extension

In early October, the House and Senate passed bills including the tax extenders package with a two-year extension of the [IRA charitable rollover](#) and other expiring charitable incentives. President Bush signed the bill into law on October 3.

Philanthropy Caucus Update

[Click here](#) for a NonProfit Times article about the congressional philanthropy caucuses.

Philanthropic Headlines

[Special USA Today Philanthropy Section](#)

The special section includes articles on the financial crisis, celebrity philanthropy, youth philanthropy, and philanthropy-related graphics, including an interactive map.

[Financial Times: Giving Lessons](#)

"Being given a big cheque and told to make a difference in the world would be daunting for any teenager. But increasing numbers of wealthy parents are handing control of philanthropic projects to their children in an attempt to educate them about the power and practicalities of inheriting wealth and encourage them to discover their own passions."

[Chronicle of Philanthropy: Women Give More Than Men, According to a New Study](#)

"Women are more generous than men when it comes to charitable giving, according to a review of Internal Revenue Service data by the consulting firm Grant Thornton, reports Business Wire."

[Philanthropy Journal: Pro-bono Effort Tops \\$400 million](#)

"An effort launched to boost pro-bono volunteering by corporate America has raised more than \$406 million of its goal of \$1 billion worth of service. The campaign, known as A Billion + Change, is sponsored by the Corporation for National and Community Service and has signed on 23 corporate partners, including IBM, Deloitte, Intel, Target and Capital One."

[Chronicle of Philanthropy: Community Foundations and The New York Times](#)

"The leader of an association of grant makers has a beef with The New York Times. In a [letter to the editor](#), Steve Gunderson, president of the Council on Foundations, writes that the newspaper "critically" overlooked community foundations in a [September 10 article](#) about donor-advised

funds. The article instead focused on the growth of such funds at financial-services companies."

[International Herald Tribune: The New Face of Private Philanthropy](#)

"'People want to give responsibly,' said Caroline Garnham, a senior partner in the London law firm Lawrence Graham and founder and director of Family Bhive, a philanthropy Web site for ultra-high-net-worth individuals and their advisers. 'What they don't want is to give money and feel they have lost all control over its outcome.'"

[Financial Times.com: Social Circles with a Square Deal for Charity](#)

"Giving circles are a hot trend in philanthropy. Similar to the investment clubs of the 1990s that brought people together to talk about stock picking, giving circles are social groups where people pool resources and decide which non-profits to fund. If giving circles prove to be a hit, a few years from now cocktail party chatter might include: 'I just got a hot tip on a non-profit you should consider!'"

Calls for Award Nominations

James Irvine Foundation Leadership Awards

The James Irvine Foundation is now accepting nominations for the 2009 James Irvine Foundation Leadership Awards, which recognize and support California leaders who are advancing innovative and effective solutions to significant state issues. Recipients receive \$125,000 in organizational support, plus assistance with communications to policymakers and practitioners about their successful models. Nominations are due by January 16, 2009, and award recipients will be announced in the summer of 2009. [Click here](#) to submit a nomination.

CECP Excellence in Corporate Philanthropy Awards

The Committee Encouraging Corporate Philanthropy (CECP) is now accepting applications for the 9th annual Excellence in Corporate Philanthropy Awards. CECP members and non-members alike are encouraged to apply: the deadline is December 4. [Click here](#) for information.

COF Awards Program

The national Council on Foundations solicits nominations for its 2009 Awards Program. Nominations are due Dec. 5 unless otherwise noted.

- [Critical Impact Awards: Independent, Public, Operating, International and Corporate Grantmaking Programs](#)
- [Critical Impact Awards: Community Foundation Programs \(deadline June 30, 2009\)](#)
- [LEAD Award -- Leadership for Equity and Diversity](#)
- [Robert W. Scrivner Award for Creative Grantmaking](#)
- [Paul Ylvisaker Award for Public Policy Engagement](#)
- [Wilmer Shields Rich Awards for Excellence in Communications](#) (open to COF members only)

Resources



Materials from the SDG Annual Conference

Not able to attend the conference? Or curious about the other workshop sessions? Check out the conference resources [online](#) ([contact us](#) if you need login info).

NCFP Report: Pursuit of Excellence: Family Foundation Practice

A [new survey](#) (pdf) by the National Center for Family Philanthropy (NCFP) concludes that most family foundations are conscientious guardians of charitable legacies. They observe high ethical standards of grantmaking practices, including fiscal oversight and accountability

Philanthropy Roundtable Donor Guidebook: Achieving Teacher and Principal Excellence

Download a free pdf of [this guide](#) that distills the best advice from pioneering donors in the field of education, while exploring the current landscape, most effective interventions, and opportunities for donors seeking to achieve an excellent teacher and principal for every child.

Training Workshop on the Redesigned IRS Form 990: December 3, 2008

USD Institute for Nonprofit Education and Research

Learn: IRS government requirements and revisions to the core form, new Form 990 schedules, rules for record keeping and officer compensation, all about required policy documents, and the answers to any and all of your questions. Fee: \$200 for first attendee, \$150 for each additional attendee. [Register online](#).

"I'm Not Rockefeller": 33 High Net Worth Philanthropists Discuss Their Approach to Giving

[Click here](#) (pdf) for the report on this Center for High Impact Philanthropy Study.

Intentional Innovation: How Getting More Systematic About Innovation Could Improve Philanthropy and Increase Social Impact

Based on a review of case studies and current innovation theory and practice, [this guide](#) from the W. K. Kellogg Foundation proposes a framework integrating best practices, processes, and tools for making innovation a more consistent and integral element of philanthropy.

New Tool for Venture Philanthropists

[From the NYT](#): A new Web-based software program aims to help foundations and grant makers set benchmarks for measuring social impact, track grantees' performance and compare their performance to other nonprofits doing similar work. The software, called Portfolio Data Management System, was developed by Acumen Fund, a venture philanthropy organization, with the help of engineers from Google. Salesforce.com, which makes Web-based software for businesses to manage their customer relationships, will distribute the new tool. Also, [click here](#) for a related blog post.

Corporate Teleconferences

These COF teleconferences are free for Council members and \$30 for nonmembers. Sessions include [Technology in Corporate Philanthropy](#): Wednesday, Nov 19; and [International Corporate Grantmaking](#): Wednesday, Feb 25.

Upcoming Programs

[Click here](#) for a complete list of SDG programs.

[Distinguished Speaker Luncheon: Paul Brest](#)

November 20, 2008

12:00-2:00pm

Location: Price Charities, 4305 University Avenue, San Diego, 92105

Cost: \$20 (SDG members), \$45 (nonmember grantmakers)

Join us for this special luncheon program with [Paul Brest](#), President of The William and Flora Hewlett Foundation, the fifth largest foundation in the United States. Before joining the Hewlett Foundation, he was a professor at Stanford Law School, serving as dean from 1987 to 1999.

What does strategic philanthropy mean? How do you develop a strategic plan to ensure meaningful results? Mr. Brest will share his perspective and wisdom based upon his experiences at The William and Flora Hewlett Foundation, and the framework presented in the newly published book he co-authored with Hal Harvey: [Money Well Spent: A Strategic Guide to Smart Philanthropy](#). Billions of philanthropic dollars all too often go to waste, failing to achieve stated goals or make true change happen. The reason for this is simple: poor strategy. Drawing on examples from many different foundations, *Money Well Spent* presents donors with the framework to design a plan that will ensure meaningful returns. Following the presentation, **Murray Galinson**, Trustee, Galinson Family Foundation and Price Charities, will moderate a conversation with Paul Brest.

[The Current Economic Storm: How Grantmakers Can Respond](#)

December 4, 2008

9:00-11:00am

Location: United Way of San Diego County, 4699 Murphy Canyon Rd, San Diego, CA 92123

Working Group Meetings

[Workforce Funders](#): **November 12, December 10**

[Homelessness Working Group](#): **November 24, December 22**

[Child Welfare Funders](#): **December 23**

[San Diego Neighborhood Funders](#): **December 5**

[Family Foundation Exchange](#): **November 18**

[Click here](#) for more information about all of these SDG programs. All programs are free for SDG members except where indicated. To RSVP, please call (619) 744-2180 or email programs@sdgrantmakers.org.

FUNDRAISING STIPULATION:

SDG was developed so that grantmakers (staff and trustees) could talk candidly with their peers about the challenges they face. With that in mind, we wish to impress upon members and potential members that fundraising or marketing is not allowed at any of SDG's programs, meetings, or other events.

Other Events of Interest

[AFPSD's National Philanthropy Day Luncheon](#)

November 12, 2008

San Diego, CA

[Yes You Can: Inspired Investing for Tough Times Teleconference](#)

November 17, 2008

Teleconference 10:00-11:15am PST

RSVP to johnc@womensfoundca.org

[Economist Conference: Corporate Citizenship: Building a Sustainable Business](#)

November 18-19, 2008

San Francisco, CA

[Southern California Grantmakers Annual Conference & Members' Meeting](#)

November 19, 2008

Los Angeles, CA

[University of San Diego's Fifth Annual Nonprofit Governance Symposium](#)

(SDG is a sponsor)

Governance Rocks: When you Know the Score

January 9-10, 2009

San Diego, CA

[COF Family Philanthropy Conference](#)

February 1-3, 2009

Indianapolis, IN

[ACCP Annual Conference on Corporate Contributions](#)

March 8-11, 2009

San Francisco, CA

[CEP Conference "Aligning for Impact: Connecting the Dots"](#)

March 31-April 1, 2009

Los Angeles, California

This online SDGrantmakers Update is published by [San Diego Grantmakers](#) to help SDG members meet the challenges of philanthropy today. 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. Copies of past editions are archived [here](#).

Contact Nancy Jamison, 619/744.2180 or nancy@sdgrantmakers.org to suggest article ideas or submit news items.