



JUNE 2002

## San Diego Grantmakers

IS AN ASSOCIATION OF ORGANIZATIONS AND INDIVIDUALS WITH ORGANIZED CHARITABLE GIVING PROGRAMS, COMMITTED TO INCREASING THE IMPACT OF PHILANTHROPY IN THE SAN DIEGO AREA.

- Networking
- Information & Communication
- Professional Development
- Joint Action

## Inside ...

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## Profiles of Professionalism:

### THE SURVEY OF CALIFORNIA GRANTMAKERS

In November and December 2001, a Regional Association of Grantmakers (RAG) collaborative—including San Diego Grantmakers, Southern California Association for Philanthropy (SCAP), and Northern California Grantmakers (NCG)—launched a survey effort to develop a profile of California grantmakers and their experiences with and interests in professional development. A total of 361 California grantmakers responded to this statewide survey for a 44% response rate.

#### A COMMITMENT TO MAKING A DIFFERENCE

- The study revealed that California grantmakers tend to be female (69.7%), Caucasian (76.5%), and highly educated (nearly two-thirds—62.2%—have degrees beyond a baccalaureate).

| SECTORS WORKED IN PRIOR TO PHILANTHROPY | NONPROFIT SECTOR | PRIVATE SECTOR | GOVERNMENT/PUBLIC SECTOR |
|---|------------------|----------------|--------------------------|
|   | 50.0%            | 3.8%           | 6.3%                     |

- Grantmakers most commonly report joining the field to make a difference and this same motivation most commonly sustains grantmakers' ongoing work in the field. In the work, they grapple with levels of need exceeding levels of resources available and competing priorities for their time.
- The majority of San Diego grantmaker respondents are representatives of private and family foundations, as was the finding with statewide respondents. Over half of San Diego respondents' primary role in their foundations is to make grants directly.
- On average, grantmakers have worked in the field for nine years. State-wide the majority of grantmakers entered the field of philanthropy mid-career; however, in San Diego 47.9% of the respondents entered early in their careers, and 39.6% mid-career.

*California grantmakers clearly seek to grow continually throughout their careers.*

#### SHAPING PROFESSIONAL DEVELOPMENT

The top three learning experiences that contribute “very significantly” to overall professional development are participation in: (1) an affinity group; (2) a pooled funds or collaborative grantmaking project; and (3) a program as a panelist. Four goals for professional development emerge as consistently ranked “very important” for a substantial proportion of respondents:

- expanding the creativity with which one approaches the work;
- increasing skill levels in one or more content areas within philanthropy;
- connecting with others in different foundations and content areas within philanthropy; and
- developing leadership potential.

*continued on page 3*

## Board of Directors

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## Corporate Links ...

### CORPORATE PHILANTHROPY UP BY 17%

The Conference Board released its 2000 report on corporate contributions. According to the report, corporate philanthropy was up by \$3.9 billion, or 17%, in 2000, the latest year for official figures. The leading sector in corporate contributions was the pharmaceutical industry. Despite the increase in total contributions, the percentage of pre-tax giving was flat at an average of 1.3%. The study covers 207 large and midsize firms representing about 36% of total corporate giving in the U.S. The study, *Corporate Contributions in 2000* can be purchased at [www.conferenceboard.org](http://www.conferenceboard.org).

### MORE CONVERSATIONS WITH DISBELIEVERS

Why have few corporations embraced social and ethical accountability when there seem to be so many studies that purport to show a clear business benefit? This question was first explored in John Weiser and Simon Zadek's 2000 report, *Conversations with Disbelievers*. The report was so well received that The Center for Corporate Citizenship at Boston College and AccountAbility have developed [www.conversations-with-disbelievers.net](http://www.conversations-with-disbelievers.net) to promote dialogue and collect case studies. Also available for download on the site is *Ongoing Conversations with Disbelievers*, a synopsis of the evidence of how and when businesses can create financial benefits for themselves while improving the communities they work in. The original report is available at [www.brodyweiser.com](http://www.brodyweiser.com).

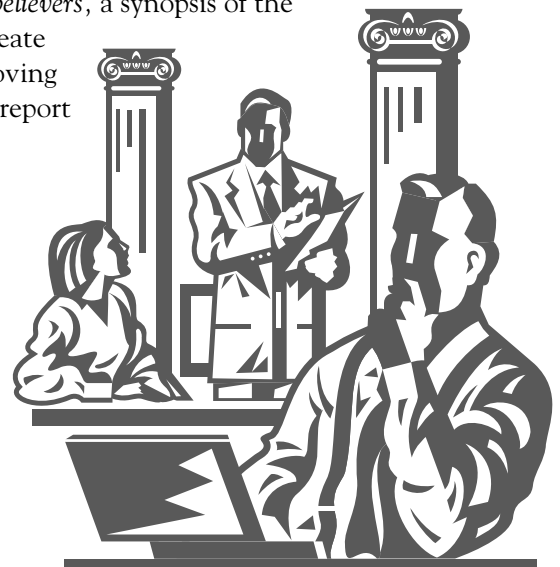
### COLLABORATION AMONG BUSINESS, GOVERNMENT, AND NONPROFITS

Technological, social, and political changes have had far-reaching implications on the way government, business, and nonprofit organizations do their work. A report from the Three Sector Initiative—a collaboration of national nonprofit, government, and business organizations—details the ways in which the three sectors use partnerships to address a range of complex problems that no single sector could handle on its own.

The report, *Working Better Together: How Government, Business and Nonprofit Organizations Can Achieve Public Purposes Through Cross-Sector Collaboration, Alliances, and Partnerships*, describes the definitive stages of any collaboration, including recognizing common needs and organizational convening potential; mutual planning for performance; agreement on operational design; start-up; operation and management; performance monitoring, communication, learning, and improving; and termination or modification of the collaboration.

"In today's society the three sectors are more interconnected than ever," said Independent Sector president Sara Meléndez. "Separately, we each perform our duties well, but to remain relevant to all our shareholders and stakeholders; nonprofits, business and government must strengthen the ties that bind us."

Read the executive summary at [www.independentsector.org/PDFs/working\\_together.pdf](http://www.independentsector.org/PDFs/working_together.pdf).



## THE SURVEY OF CALIFORNIA GRANTMAKERS

*continued from page 1*

Interesting differences surfaced when newer and more experienced grantmakers were surveyed regarding goals for professional development. San Diego grantmakers in the field for 15+ years place significantly higher value on “refreshing or re-energizing commitment to philanthropy” as a reason for seeking professional development opportunities. Those in San Diego in the field 6-15 years place higher value on “exploring the match between personal and professional life” as a reason for seeking professional development.

With very few exceptions, SDGrantmakers’ member’s experiences and perceptions are comparable to grantmakers statewide. Differences of note include:

- Entering the field earlier in their careers, and
- Perceiving RAGs as playing a more prominent role in offering professional development opportunities.

Grantmakers in the field 0-5 years place a higher level of importance on “program evaluation” and “working in diverse communities” skill sets. In terms of areas in which grantmakers are most interested in building their current skill levels, the following received the highest proportion of grantmakers who are “very interested” in developing:

- Knowledge of specific grantmaking area
- Program evaluation
- Leadership skills
- Financial review
- Organizational assessment
- Dissemination of model programs/lessons learned
- Managing grantmaking programs

*Grantmakers most commonly report joining the field to make a difference and this same motivation most commonly sustains grantmakers’ ongoing work in the field.*

To be an effective grantmaker, one must master numerous “soft” and “hard” skills, usually in addition to acquiring content knowledge of the area(s) in which one is making grants. Grantmakers must work well with people—board members and grantseekers alike. They should be able to assess organizational functioning and understand the value and impact through evaluation processes. Effective grantmakers are strategic with firm ethics and value systems to balance funding power with compassion and understanding to best address the needs of the nonprofit organizations.

California grantmakers clearly seek to grow continually throughout their careers. Their responses to this survey indicate the value they place on learning and development. SDGrantmakers is hard at work translating the results of this survey into new learning opportunities for grantmakers. Stay tuned.

**TO VIEW THE REPORT IN ITS ENTIRETY, VISIT**  
**[www.CAfoundations.org](http://www.CAfoundations.org)**

# Alliance Healthcare Foundation

and

**10** KGTV-  
Channel 10

present

## KIDS IN CRISIS: THE FOSTER CARE GAP

THURSDAY, JUNE 20, AT 8 PM

*Channel 10 will also air a series of related stories on foster care issues the week preceding the special broadcast.*

Many youth emancipated from the foster care system face grim prospects of unemployment, inadequate health care and lack of affordable housing.

Some leave foster care still hobbled by the effects of physical, mental and sexual abuse, while others begin their lives as adults disabled by mental illness, substance abuse or learning disorders. Many simply do not have the day-to-day living skills required to live on their own.

A key goal of this outreach campaign is to encourage more adults to help foster youth by becoming mentors, Court Appointed Special Advocates (CASAs), educational advocates, and foster parents. Alliance will host Focus on Foster Youth resource fairs on Saturday, June 22 at Hoover High School and CSU San Marcos.

For more information contact Alliance at 858/614-1780 or check the website (after June 20), [www.alliancehf.org/fostercare](http://www.alliancehf.org/fostercare).



## Connecting . . .

### ONLINE RESOURCES

Resources from this issue and previous issues of *Philanthropy Link* are available online in San Diego Grantmakers' **Philanthropy: News You Can Use** section at: [www.SDGrantmakers.org/philanthropy/news\\_you\\_can\\_use.asp](http://www.SDGrantmakers.org/philanthropy/news_you_can_use.asp).



### FOUNDATION CEO'S TALK ABOUT PERFORMANCE MEASUREMENT

Foundations take pride in the good works they enable. But what does it mean for a foundation to perform well? And how can its performance be measured? Toward a Common Language, recently issued by The Center for Effective Philanthropy, discusses foundation CEOs' perspectives regarding performance measurement. The report states that both internal motivation and increasing external pressure are driving foundation leaders to seek improved measures of performance.

- In the 60% of the 75 foundation CEOs interviewed say they anticipate increasing external scrutiny of foundation activities over the coming decade.
- Assessment of social impact is the area in which CEOs most desire increased board involvement.

According to the report, many trustees welcome the challenge, "it is up to the board to insist on some clarity and framework against which grand programs are measured."

The report continues to demonstrate evidence that a common language for thinking about overall foundation performances is beginning to emerge. CEOs reflected different words and emphases, yet focuses on consistent overarching themes: achieving impact, setting the agenda, and managing operations.

The full report is available online at [www.effectivephilanthropy.org](http://www.effectivephilanthropy.org).

## In the News . . .

### 8 IN 10 EXECUTIVES USE IT AS TIME SAVER

*Wired, Willing, and Ready*, a study by Independent Sector and Cisco Systems examines the attitude toward and usage of information technology by a national sample of more than 200 executives in nonprofit organizations.

While email and the internet are the most common forms used, many organizations also have websites (49% surveyed) or office networks (52% surveyed). Ninety-one percent use the internet for research on how other organizations carry out their programs; 71% use the internet to conduct day-to-day operations, such as budgeting and buying supplies; and 44% recruit employees and volunteers over the internet.

This report is available online at [www.independentsector.org](http://www.independentsector.org).

## Family Ties . . .

### RESOURCES FOR FAMILY FOUNDATIONS

#### *A Child's "Station in Life:" Inheritance Rights and Expectations*

The Journal of Wealth Management deals with one of the most controversial issues in generational planning: how best to decide what and how much to give to children?

Download a copy of the article on the Journal's website, [www.ijwm.com/common/getArticle.asp?ArticleID=17894](http://www.ijwm.com/common/getArticle.asp?ArticleID=17894) or contact the Journal at 212/224-3205.

### SPOTLIGHT: DONOR LEGACY IN THE NEWS

Two recent articles, "Charitable Strings" and "A Question of Intent," in *Forbes* and *Worth* magazines respectively, look at the challenges that donors face when establishing their intent. Communicating one's clear and lasting charitable wishes is not always as easy as it looks—in many cases, changes in society or in the gift's recipients lead to situations in which the donor's stated wishes cannot be adhered to appropriately. Thinking carefully about how to express your wishes without placing inappropriate restrictions or guidelines can be a challenging task. Some of the strategies presented include putting your thoughts in writing and naming trustees who share the donor's vision. Find "Charitable Strings" at [www.forbes.com/philanthropy](http://www.forbes.com/philanthropy) and "A Question of Intent" from the April 2001 edition of *Worth* magazine at [www.worth.com/content\\_articles/0401\\_question.html](http://www.worth.com/content_articles/0401_question.html).

The National Center for Family Philanthropy also highlights issues of donor intent in "Living the Legacy: The Values of Family's Philanthropy Across Generations." To order call 202/293-3424 or visit [www.ncfp.org](http://www.ncfp.org).

# Top 10 Ways Family Foundations Get Into Trouble

Many of the most common mistakes made in running a family foundation are inadvertent and under the rubric of self-dealing. The Council on Foundations recently published *Top 10 Ways Family Foundations Get Into Trouble* by John Edie and Ellen Bryson. Designed to make the running of a family foundation as smooth as it is rewarding, the simple guide helps staff and trustees avoid common legal pitfalls. Below is a quick overview of the *Top 10 Ways* . . .

## 1. ENGAGING IN SELF-DEALING

Perhaps the most common form of breaking the rules is self-dealing. Self-dealing prohibits the foundation from entering into any financial transaction with those who are considered disqualified persons. These include officers, directors, and trustees of the foundation; substantial contributors; companies or partnerships owned substantially by disqualified persons; or spouses and families of all listed above.

## 2. SATISFYING PERSONAL PLEDGES

If a disqualified person makes a legally binding pledge, it is also considered self-dealing for a foundation to pay that pledge. A pledge is a personal obligation and a family foundation cannot fulfill it.

## 3. ATTENDING FUNDRAISERS ON A FOUNDATION TICKET

Using a fundraiser ticket or offering it to your spouse because you cannot attend may seem innocent, but can actually be illegal. Disqualified persons can only use foundation-purchased tickets if they attend the event with the responsibility of evaluating that grantee. Most tickets have some economic value and a disqualified person cannot use these. There are many exceptions, so check with your lawyer if you have a question.

## 4. HIRING FAMILY MEMBERS

While, *Top 10 Ways* . . . notes that hiring family members as staff and paying them a salary or fee is allowed, California, specifically, has very strict laws in this arena. According to California law (CA Corporation Code Section 5227) compensation to a family member is **not** allowed **unless** a majority of the governing board is made up of non-family members.

## 5. COMPENSATING BOARD MEMBERS

Most foundations do not compensate their board members, but it is legal. Similar to Rule #4, the pay must be reasonable and the work must be necessary.

## 6. PAYING FOR FAMILY TRAVEL

Typically family foundation assets cannot be used to finance the travel of spouses or children. However, there are exceptions if that person's travel is because of a legitimate and meaningful duty to assist the foundation.

## 7. MAKING GRANTS TO INDIVIDUALS

Grants to individuals are allowed as long as you follow certain rules. The grant must be for a charitable purpose and not grants can be given to disqualified persons.

## 8. MAKING GRANTS TO NON-CHARITIES

Family foundations can give grants to organizations that are not charities, however, it is important to follow specific steps. You must have a pre-grant inquiry, a written agreement, a separate account for the funds given to the grantee, and regular reports from the grantee about expenditures and a summary description of the grant in your tax return. In other words, you must exercise expenditure responsibility.

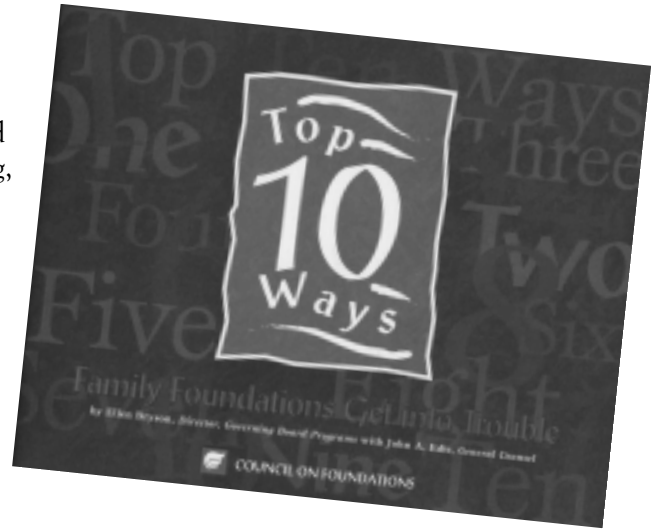
## 9. USING A FISCAL AGENT

Making a grant through a fiscal agent is only appropriate when the grant is not earmarked and when the fiscal agent has total control over the way funds are granted. This can be a way to fund new organizations that do not yet have 501(c)3 status, but you still must follow expenditure responsibility.

## 10. MAKING GRANTS INTERNATIONALLY

Grants can be made virtually anywhere, including internationally, providing you follow administrative requirements. A family foundation can exercise expenditure responsibility or meet the equivalency determination requirements in order to make international grants.

*Edie and Bryson remind foundations that these tips are "the basics of the basics." Always use a qualified and experienced attorney as needed.*



**SDGrantmakers has purchased a limited number of copies of *Top 10 Ways Family Foundations Get Into Trouble* for our members for free while supplies last. Send a request to [info@sdgrantmakers.org](mailto:info@sdgrantmakers.org) or call 619/744-2180.**

# People . . .

**Amy Dukes** has joined the City of San Diego Commission for Arts and Culture as the Arts Management Associate working with the Neighborhood PARTnerships program.

Congratulations to **Al Panico**, Waitt Family Foundation, who sat on Council on Foundation's planning committee for the 2002 Annual Conference in Chicago. With 2000+ attendees, including (about) 22 San Diegans, it was a success. Incidentally, Al also sits on COF's International Grantmaking Committee.

The Hamilton-White Family Foundation's **Phil White** was recently elected to COF's Committee on Family Foundations. We look forward to hearing more about the committee's efforts as the 2003 COF Family Foundations conference will be held in San Jose, CA, in March.

**Karen Smelkinson** recently resigned as Executive Director of Callaway Golf Company Foundation and from the board of directors of San Diego Grantmakers. But she is not going far ... Karen is launching, Seed, a philanthropy consulting firm assisting individuals in setting up foundations, and organizing and strategizing their philanthropy. Karen, good luck with all your future ventures and thank you for your efforts on behalf of SDGrantmakers!

Congratulations to QUALCOMM's **Julie Kalk** and husband Alex, who welcomed the newest little philanthropist to the world, Lila Caroline, on January 26th. Julie is back in the office heading up QUALCOMM's corporate giving.

**Sharla Meeks** joins SDGrantmakers as the Member Services Coordinator. Most recently, Sharla worked in advertising and communications with the St. Joseph Hospital and Children's Hospital of Orange County foundations. She graduated magna cum laude from UC Irvine with a BA in Social Ecology.

## About San Diego Grantmakers . . .

### VALUES – WE BELIEVE IN:

**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.

### OUR VISION IS TO

build a strong philanthropic community strengthened by our vibrant leadership.

### OUR MISSION IS TO

connect, teach, and inspire a diverse group of foundations and corporations to develop and implement successful philanthropy in the San Diego region.

### SAN DIEGO GRANTMAKERS THREE-YEAR STRATEGIC PLAN JUNE 2001

In June 2001, the board of SDGrantmakers adopted a three-year strategic plan. The planning process included individual interviews, focus groups with members, a community leaders meeting, and a planning retreat. In addition, we looked at national and state trends in the philanthropic sector and reviewed data from regional associations of grantmakers in other parts of the country where philanthropy is making authentic change.

The strategic goals were developed to respond to our member's needs – you are the essential motivation for SDGrantmakers' mission and priorities. We welcome your input as we continue to revise our activities to reflect the evolving needs of our members.

Members can review the plan at:

[www.sdgrantmakers.org/members\\_only/strategic\\_plan/splan.asp](http://www.sdgrantmakers.org/members_only/strategic_plan/splan.asp)

### MEMBERSHIP

Increase the number of members, with the goal of every eligible grantmaker in the San Diego region becoming a member. Increase the members' investment in SDGrantmakers. Eighty-five percent of members rate the value of their SDG membership as "excellent."

### PROGRAMS AND SERVICES

Become the acknowledged provider of philanthropic programs and services in San Diego to ensure competent and knowledgeable grantmakers. Provide skill-building, networking, and educational opportunities to grantmakers through programs, as well as newsletters, website, and technical assistance.

### COLLABORATIONS

Increase varying levels of collaborations among grantmakers, including facilitating funding of a minimum of one new collaboration with shared decision-making.

### STRENGTHENING PHILANTHROPY

Make philanthropic options available to a larger audience by sharing and celebrating the success of philanthropic endeavors with the public.

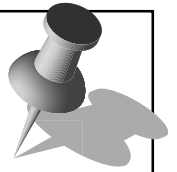
### COMMUNICATIONS

Develop a comprehensive communications plan positioning SDGrantmakers as a resource and connection regarding private philanthropy, measured by increased participation and feedback from our members and increased community contact.

### FINANCIAL DEVELOPMENT

Develop a financial management system with annual assessments and refinements.

# Calendar of Events . . .



**JUNE 17 ...**

**SAN DIEGO FOUNDATIONS:**

**TRUSTEE-TO-TRUSTEE**

**DEVELOPING A COMMUNITY OF  
GRANTMAKING LEADERS INVESTING  
IN SOLUTIONS IN SAN DIEGO**

5:30 – 7:30pm

*Museum of Contemporary Art  
700 Prospect Street, La Jolla*

Join San Diego Grantmakers for an evening of conversation about the challenges and opportunities of grantmaking in San Diego. This special gathering is an opportunity for San Diego's unique community of grantmaking trustees to get to know one another and to talk about community investments in a social atmosphere. Spouses, children, relatives, and community innovators who represent your foundation's past, present, and future leadership are welcome to attend.

**JUNE 26 ...**

**IMPLEMENTATION & ALLOCATION:  
PROP. 10'S IMPACT IN SAN DIEGO  
A CONVERSATION WITH  
GLORIA BRYNGELSON, ED**

9:00 – 11:00am

*Children's Hospital, San Diego*

What does it mean to say a child is ready to learn? The Prop. 10 commission has struggled with just that question. With the tobacco tax as a resource, they are ready to provide answers.

Spending approximately \$45 million annually for a 10-year period, Prop. 10's impact in San Diego is significant. What does that mean for grantmakers? Where do we fit in the picture, how can we collaborate, and how do we ensure sustainability of the programs after the 10-year mark?

Join us to discuss Prop. 10's indicators of success – every child is ready to learn – and grantmakers' roles in ensuring success.

**JULY 10 ...**

**SAN DIEGO'S ENVIRONMENTAL ISSUES: PRESERVING PARADISE**

*Co-sponsored by The San Diego Foundation*

*11:30am – 1:30pm, Mission Trails Visitor Center, [www.mtrp.org](http://www.mtrp.org)*

Enhance your understanding of San Diego's environmental issues in a way that leads to greater involvement in the resolution of problems and the development of responsible stewardship practices. Emily Young, Ph.D., The San Diego Foundation, will moderate a panel of nonprofit leaders as they discuss the trends and future of San Diego's environment and of grantmakers respond with "What's a funder to do?"

This session will illustrate how funders can support the preservation, conservation, and management of the habitats and natural resources that comprise our rich biological diversity; build livable communities by striking a balance between economic development and social equity and protecting and enhancing open space in urban neighborhoods; and reduce and prevent the inequities of pollution and limited open spaces typically found in poorer neighborhoods.

**JULY 17 ...**

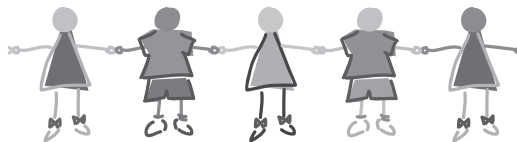
**WEAVING THE PEACE:**

**PREVENTING VIOLENCE THROUGH THE BUILDING OF COMMUNITY**

*Co-sponsored by National Funding Collaborative on Violence Prevention (NFCVP) and the Waitt Family Foundation, 9:30am – 1:30pm, Location TBD*

If you perceive violence prevention as just a way of controlling crime, we're ready to give you a different viewpoint. Since 1995 the National Funding Collaborative on Violence Prevention has centered its work in violence prevention around the ideas and practices of building community. Please join us as they present an interactive program reviewing state-of-the-art work in community-based violence prevention. Hear firsthand about the powerful ways residents from troubled communities have come together to build community and ensure the health, safety, and positive growth of their children, youth, and families. This program will:

- Expand participants' understanding of the role of violence prevention in community building
- Expose participants to exemplary national and San Diego-based programs in violence prevention
- Engage participants in interactive, dynamic discussion about violence prevention and community building



**Reserve your seat today!**

**San Diego Grantmakers**

4270 Executive Square, Ste. 200 • La Jolla CA 92037

phone 619/744-2180 • fax 619/744-2182

[www.SDGrantmakers.org](http://www.SDGrantmakers.org) • [programs@SDGrantmakers.org](mailto:programs@SDGrantmakers.org)

# National Philanthropy Day

WEDNESDAY,  
NOVEMBER 20, 2002

*Change the World  
with a Giving Heart*

Through *National Philanthropy Day* we honor all that has been accomplished in San Diego in the name of giving and those that give, as well as highlight that there is still more to do.

To receive a form to nominate individuals and/or organizations that you believe best exemplify the "heart" of San Diego, contact SDGrantmakers at [www.SDGrantmakers.org](http://www.SDGrantmakers.org) or 619/744-2180. All nominations must be received by Friday, June 15.

*San Diego  
Grantmakers  
Welcomes Our  
Newest Members . . .*

- **SERENITY FOUNDATION**
- **GATEWAY COMPUTERS**



## SAN DIEGO GRANTMAKERS PHILANTHROPY LINK

*We welcome articles, comments and suggestions, short news items about programs and initiatives from members for SDGrantmaker's newsletter.*

**JULIE HOLDAWAY, DIRECTOR**  
**JULIE@SDGRANTMAKERS.ORG**

**SHARLA MEEKS, MEMBER SERVICES COORDINATOR**  
**SHARLA@SDGRANTMAKERS.ORG**

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Strengthening Philanthropy

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## M E M O R A N D U M

**TO:** SDGrantmakers Members  
**FROM:** Julie Holdaway, Director  
**DATE:** June 10, 2002  
**SUBJ:** Consider Volunteering  
 for a SDGrantmakers Committee!

This is your organization and there are many ways to work together with grantmaking colleagues to further build a learning community. Join a planning committee to help develop SDGrantmakers' capacity to support your grantmaking and strengthen philanthropy in San Diego.

We invite all our members to join a planning committee for one-year terms, which can be extended for another year or two. The committees meet approximately three times per year. We would like to involve a broad cross-section of our members representing the diversity of grantmakers in San Diego.

Please take a moment to indicate your interest by completing the form below and return it to SDGrantmakers fax 619/744-2182 or [programs@sdgrantmakers.org](mailto:programs@sdgrantmakers.org).

### PLANNING COMMITTEE PREFERENCES 2002-2003

Indicate your interest in joining a planning committee by completing this form and return to SDGrantmakers via fax 619/744-2182 or [programs@sdgrantmakers.org](mailto:programs@sdgrantmakers.org).

If you have any questions, contact Julie Holdaway, 619/744-2180 or [Julie@sdgrantmakers.org](mailto:Julie@sdgrantmakers.org).

**Yes! I am interested in serving on a SDGrantmakers planning committee.**

- Member Relations    Finance    Annual Conference  
 Family Foundation Track    Corporate Track

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

*We look forward to continue working with you to strengthen philanthropy in San Diego.*

San Diego Grantmakers  
 4270 Executive Square, Ste. 200, La Jolla CA 92037  
 ph 619/744-2180 fx 619/744-2182 [www.SDGrantmakers.org](http://www.SDGrantmakers.org)

### *Planning committees include:*

#### **MEMBER RELATIONS COMMITTEE**

This committee emphasizes recruiting grantmaking organizations, develops and implements outreach strategies to engage members in SDGrantmakers learning community and works to enrich the overall experience of membership. In addition, the committee recommends policy regarding eligibility for membership.

#### **FINANCE COMMITTEE**

The Finance Committee, chaired by SDGrantmakers' Treasurer, will assist the Director and report to the Board of Directors. The chart of work includes reviewing and recommending fiscal policies and reporting, annual budgeting, external audit/reviews, and monitoring progress toward strategic and operating financial development goals.

#### **ANNUAL CONFERENCE COMMITTEE**

In 2002, SDGrantmakers will host its first annual conference. The objective is to provide a stellar, thought-provoking educational opportunity that inspires and educates grantmakers. The committee is responsible to design the conference format, develop theme and determine speaker(s), and establish a cost structure.

#### **FAMILY FOUNDATION TRACK COMMITTEE**

This committee will develop a menu of program options enhancing the skills and capacity of family foundations to do great work. The committee will help create a community with family foundations working and learning together, considering how educational programs, issue briefings, the website, and publications can most effectively impact the work of family foundations.

#### **CORPORATE TRACK COMMITTEE**

The Corporate Track committee will design a series of services to further the professional development of corporate grantmakers. The committee will consider a variety of venues, including educational and networking programs, the website, *Corporate Link* and other SDGrantmakers newsletters, and a corporate listserv.



**JUNE 17 ...**

**SAN DIEGO FOUNDATIONS: TRUSTEE-TO-TRUSTEE – DEVELOPING A COMMUNITY OF GRANTMAKING LEADERS INVESTING IN SOLUTIONS IN SAN DIEGO**  
5:30 – 7:30pm

*Museum of Contemporary Art  
700 Prospect Street, La Jolla*

Join San Diego Grantmakers for an evening of conversation about the challenges and opportunities of grantmaking in San Diego. This special gathering is an opportunity for San Diego’s unique community of grantmaking trustees to get to know one another and to talk about community investments in a social atmosphere. Spouses, children, relatives, and community innovators who represent your foundation’s past, present, and future leadership are welcome to attend.

**JUNE 26 ...**

**IMPLEMENTATION & ALLOCATION: PROP. 10’S IMPACT IN SAN DIEGO – A CONVERSATION WITH GLORIA BRYNGELSON, ED**  
9:00 – 11:00am

*Children’s Hospital, San Diego*

What does it mean to say a child is ready to learn? The Prop. 10 commission has struggled with just that question. With the tobacco tax as a resource, they are ready to provide answers.

Spending approximately \$45 million annually for a 10-year period, Prop. 10’s impact in San Diego is significant. What does that mean for grantmakers? Where do we fit in the picture, how can we collaborate, and how do we ensure sustainability of the programs after the 10-year mark?

Join us to discuss Prop. 10’s indicators of success – every child is ready to learn – and grantmakers’ roles in ensuring success.

**JULY 10 ...**

**SAN DIEGO’S ENVIRONMENTAL ISSUES: PRESERVING PARADISE**

*Co-sponsored by  
The San Diego Foundation*

11:30am – 1:30pm  
*Mission Trails Visitor Center*

*www.mtrp.org*

Enhance your understanding of San Diego’s environmental issues in a way that leads to greater involvement in the resolution of problems and the development of responsible stewardship practices. Emily Young, Ph.D., The San Diego Foundation, will moderate a panel of nonprofit leaders as they discuss the trends and future of San Diego’s environment and of grantmakers respond with “What’s a funder to do?”

This session will illustrate how funders can support the preservation, conservation, and management of the habitats and natural resources that comprise our rich biological diversity; build livable communities by striking a balance between economic development and social equity and protecting and enhancing open space in urban neighborhoods; and reduce and prevent the inequities of pollution and limited open spaces typically found in poorer neighborhoods.

**Reserve your seat today!**

*programs@sdgrantmakers.org* • fax 619/744-2182 • phone 619/744-2180

**JULY 17 ...**

**WEAVING THE PEACE: PREVENTING VIOLENCE THROUGH THE BUILDING OF COMMUNITY**

*Co-sponsored by National Funding Collaborative on Violence Prevention (NFCVP)*

*and the Waitt Family Foundation*  
9:30am – 1:30pm, Location TBD

If you perceive violence prevention as just a way of controlling crime, we’re ready to give you a different viewpoint. Since 1995 the National Funding Collaborative on Violence Prevention has centered its work in violence prevention around the ideas and practices of building community. Please join us as they present an interactive program reviewing state-of-the-art work in community-based violence prevention. Hear firsthand about the powerful ways residents from troubled communities have come together to build community and ensure the health, safety, and positive growth of their children, youth, and families.

**THIS PROGRAM WILL:**

- Expand participants’ understanding of the role of violence prevention in community building
- Expose participants to exemplary national and San Diego-based programs in violence prevention
- Engage participants in interactive, dynamic discussion about violence prevention and community building

**Yes! Sign me up for:**

- JUNE 17 ... SAN DIEGO FOUNDATIONS: TRUSTEE-TO-TRUSTEE**
- JUNE 26 ... IMPLEMENTATION & ALLOCATION: PROP. 10’S IMPACT IN SAN DIEGO**
- JULY 10 ... SAN DIEGO’S ENVIRONMENTAL ISSUES: PRESERVING PARADISE**
- JULY 17 ... WEAVING THE PEACE: PREVENTING VIOLENCE THROUGH THE BUILDING OF COMMUNITY**

NAME: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_

PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

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