2007 Annual Conference

STRATEGIC GRANTMAKING

Inspiration to Implementation

Thursday, November 8, 2007
Welcome

Welcome to the San Diego Grantmakers 2007 Annual Conference! We are pleased to be able to return to NTC Promenade this year for a day of learning, networking, and reflection. Thank you for joining us.

We believe that keeping an essential balance between the why (inspiration) and the how (implementation) of grantmaking is key to achieving the missions of all of our organizations. Recognizing that grantmakers of all types face this need led to our conference theme of: “Strategic Grantmaking: Inspiration to Implementation.”

It is our hope that through our nationally recognized speakers and panelists you will reconnect with the call of being a grantmaker and be inspired to continue your work with true heart. At the same time, we hope that you will learn specific tools and methodologies to help you implement strategies that will further your organization’s goals.

We encourage you to make the most of this annual local opportunity to learn and grow in the field of philanthropy by speaking with your peers and the invited experts and listening with both your heart and your head. We hope that you will leave here better equipped to go out and make the world a better place. Thank you for the positive difference you are making in our community.

Janine Mason  
Conference Co-Chair  
The Fieldstone Foundation

Charlene Seidle  
Conference Co-Chair  
Jewish Community Foundation

Nancy Jamison  
Executive Director  
San Diego Grantmakers
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HOST

Alan & Louarn Sorkin, Sorkin Family Fund
Strategic Grantmaking:
Inspiration to Implementation Conference Agenda

9:30-10:00am  Registration & Breakfast

10:00-11:15am  Welcome: Conference Co-Chair Janine Mason
Opening Plenary: Influenced by Inspiration: Impressions from a Philanthropic Leader
Peter deCourcy Hero, Senior Advisor, Silicon Valley Community Foundation

11:30-12:45am  Morning Workshop

12:45-2:00pm  Lunch
Introduction: Conference Co-Chair Charlene Seidle
Afternoon Plenary: Instruments for Implementation: Increasing your Philanthropic Impact
Albert Ruesga, Vice President, Meyer Foundation; Chair, Hispanics in Philanthropy; blogger

2:15-3:30pm  Afternoon Workshop

3:30-4:30pm  Closing Remarks: Nancy Jamison, Executive Director, SDG and Gregory Hall, Chair, SDG Board of Directors
Dessert Reception
Books featuring the work of some of our speakers will be available for purchase and signing during the reception.
The best part of banking has nothing to do with money.

It’s about people. And bringing people together for events like the San Diego Grantmakers Annual Conference. Together, we’re committed to helping build and strengthen the communities around us. To learn more, stop by a WaMu near you, call 1-800-788-7000 or visit wamu.com.

Creating a Better World Together.

As a grateful partner, we are proud to sponsor the 2007 San Diego Grantmakers Annual Conference.

Better World Together Foundation

www.BetterWorldTogether.org

THE CALIFORNIA ENDOWMENT
is pleased to support the
SAN DIEGO GRANTMAKERS

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Peter Hero led the Silicon Valley Community Foundation through a period of enormous growth and helped to create a culture of giving in that region. Through stories of civic engagement and grassroots organizing, Mr. Hero will weave strategies for effective grantmaking with the ultimate outcome of renewed optimism for both funders and grantees. Mr. Hero will outline a process for building community, leveraging funds, and changing lives for the better. He will show that well thought-out grantmaking strategies, with an eye toward a growing sense of common community, result in a culture of civic involvement that is powerful and inspirational.

Since January 2007, Peter has been Senior Advisor to the Silicon Valley Community Foundation, a new foundation he helped create by merging his former foundation with a neighboring community foundation. From 1988 to 2007, Peter was President of Community Foundation Silicon Valley which, under his leadership, grew from a small foundation with less than $10 million in assets and only three staff to a regional center for philanthropy, with more than $1.1 billion in assets, and 800 philanthropic funds under its umbrella, including 12 supporting foundations and 26 corporate advised funds. In 2006 the foundation distributed over $2 million/week in grants to charitable organizations.

Fortune Magazine, in an extensive article on CFSV, noted that: “It is Peter Hero, more than anyone else, who has shown Silicon Valley how to give…by channeling the area’s distinctive culture into an unusual brand of charity: demanding, ambitious, self-conscious, creative, even risky—everything you’d expect from Silicon Valley.”

Peter is a frequent guest lecturer at Stanford Graduate Business School and his writing on community development and philanthropy has been published in the United States and Europe. He was the founding Chair of the Public Broadcasting Service Foundation, and is on the Boards of Directors of The Skoll Foundation, eBay Foundation, PBS, The American India Foundation, and several others. Since 1996, Peter has worked in Central and Eastern Europe creating a network of emerging community foundations. He holds an M.B.A. from Stanford University School of Business, an M.A. (With Distinction) in Art History from Williams College, and (Honorary) Doctor of Laws from the Maine College of Art.
Imagine a world where care and understanding go hand-in-hand with dignity and respect.

Imagine that. We can.

QUALCOMM is proud to support San Diego Grantmakers in their effort to promote positive change in our community.

www.qualcomm.com/community
Traditionally, the philanthropic sector has focused its efforts on providing financial support to direct service programs. Clearly, we need this kind of direct grantmaking, but this is just one tool in a larger arsenal. It’s an arsenal that we as grantmakers can use to address important needs and move vital issues forward. Albert Ruesga, Vice President at the Meyer Foundation and a nationally respected philanthropy blogger and educator, shares the latest thinking on the subject of strategic grantmaking, including new resources for increasing the impact of our giving.

Dr. Albert Ruesga is currently the Vice President for Programs and Communications at the Meyer Foundation in Washington, DC. The Meyer Foundation is one of the oldest and largest foundations in Greater Washington and has earned a national reputation for its work in communications and capacity building. Albert was the founding director of New Ventures in Philanthropy, a national initiative that has helped generate more than $500 million in new philanthropic resources against an investment of $14 million.

He currently serves as the chair of Hispanics in Philanthropy, a transnational network of grantmakers committed to strengthening Latino communities across the Americas. He is the treasurer of The Communications Network, and serves as advisor to the National Center for Family Philanthropy and on the board of the Greater Washington Catalogue for Philanthropy.

Albert earned his Ph.D. at MIT and taught ethics and logic at Gettysburg College before entering the world of philanthropy. He also served as a teaching fellow at Harvard University. An accomplished writer, his articles have appeared in Social Theory and Practice, The Journal of Popular Culture, and other publications. He was for many years a contributing writer to The Boston Book Review, and he’s currently a guest contributor at the on-line Stanford Social Innovation Review. He is the founding editor of, and a frequent contributor to, the White Courtesy Telephone blog on the Third Sector and civil society, cited by the Chronicle of Philanthropy as “one of the ten nonprofit blogs that get attention.”
We applaud

San Diego Grantmakers

on their commitment to effective philanthropy in California.

The California Wellness Foundation

Grantmaking for a Healthier California

www.tcwf.org

The Jewish Community Foundation is proud to partner with San Diego Grantmakers to strengthen philanthropy.

We are:

• The most generous grant maker in San Diego with $55 million-plus in 4,700 grants to 1,100 Jewish and general organizations last year
• The oldest community foundation in San Diego with 40 years of giving
• Helping to build endowments for a strong community

Jewish Community Foundation
San Diego

4950 Murphy Canyon Road
San Diego, CA 92123
(858) 279-2740 www.jchandiego.org

Marjory Kaplan, CEO
Sheila Poiker, Chair
Morning Workshop Options

#1: Learning from Stories in Family Philanthropy

Judy Belk, Senior Vice President, Rockefeller Philanthropy Advisors

Hearing stories about how other family foundations deal with problems, find innovative strategies, and cement mutual values can bring insights that transform your own philanthropy. Judy Belk has an extensive background in helping family foundations. She will talk about family dynamics, best practices, and ways to avoid pitfalls. There will be plenty of time for questions to personalize this session for each attendee. We might even hear a story about the Rockefellers themselves!

#2: Talking with Peter Hero: Emerging Challenges and Opportunities in Philanthropy

Peter Hero, Senior Advisor to the CEO, Silicon Valley Community Foundation

In a more intimate setting, join Peter in a discussion about 21st century philanthropy. Peter will address globalization, international giving, and the emphasis on mission-related investing and multiple bottom lines. We will also explore topics like new governmental requirements and advances in technology that are both accelerating and challenging traditional giving methods. Attend this session to chat with a philanthropic leader about your organization’s challenges and opportunities.

#3: Bridging the Divide between Philanthropy and Government

Sandra R. Hernández, M.D., Chief Executive Officer, The San Francisco Foundation
Torie Osborn, Senior Advisor to the Mayor of Los Angeles Antonio R. Villaraigosa
Murray L. Galinson, The Galinson Family Foundation (morning session only)

Philanthropy and government often work in the same funding areas, but usually not in concert. Traditionally, many philanthropists have shied away from such collaborations due to beliefs that they are full of stumbling blocks. How can we rethink the opportunities for partnership between the public and private sectors? Join us for a fascinating session with leaders who have been on both sides of the divide to discuss philanthropy/government collaborations for the greater community good.

#4: Creating a Culture of Learning: Inspired Evaluation

Fatima Angeles, Dir. of Evaluation and Organizational Learning, The California Wellness Foundation
Marty Campbell, Vice President for Programs, The James Irvine Foundation
Mark Kramer, Founder and Managing Director, FSG Social Impact Advisors

Evaluation has long been standard practice at large foundations to help grantees improve programs and demonstrate impact. Increasingly, even smaller foundations are using evaluation creatively, not only to help organizations strengthen programs but also to improve grantmaking effectiveness. Learn about innovative approaches and real-life examples of how evaluation can inspire the way we operate. A recently-released FSG report on evaluation will frame our discussion.

#5: Examining Foundation Ethics and Accountability: Perspectives from Washington D.C.

Steve Gunderson, President & CEO, Council on Foundations
Andrew Schulz, Deputy General Counsel, Council on Foundations

While the core of the philanthropic world conducts its business with great care, abuses are catching headlines — and the ears of members of Congress. We need to refine the ethical principles that guide our efforts and to understand legislation that impacts our sector. Hear COF’s thinking about holding members accountable, the latest legislative trends, and what it all means for the future of philanthropy.
First 5 San Diego
First 5 Commission of San Diego County
Improving the lives of children [0] to [5]
Major Funding Initiatives
Oral Health
Preschool For All
School Readiness
Health Care Access
Parent Development
Health and Developmental Services
www.first5sandiego.org

The Parker Foundation
Gerald T. and Inez Grant Parker

Price Galinson Collaborative Fund
#6: Serving Two Masters: Enhancing the “Corporate” and “Community” Aspects of Your Giving Program

Lois Greco, Senior Vice President, Evaluations, Wachovia Regional Foundation

Thomas W. Knowlton, Vice President and Director of Corporate Citizenship, TCC Group

Mailee Walker, VP and Communication/Program Officer, Wachovia Regional Foundation

Increasingly, both consumers and employees want to know how businesses give back, while company leaders ask how their grant programs are building the corporate brand. Join a discussion about how the integration of evaluation and communication can serve as a roadmap to help answer these questions and raise the visibility of corporate community programs and grantee performance. The session will highlight stories and tools used by Wachovia, draw upon TCC’s experience in the corporate sector, and give you a chance to discuss your community programs with corporate colleagues.

#7: Talking with Albert Ruesga: What’s Technology Got to Do With It?

Albert Ruesga, philanthropy blogger, White Courtesy Telephone

Most of us probably use “Google” and email in our work every day. But have you been on a blog or a wiki lately? Or checked out a social networking site or listened to a podcast? Technology is transforming how information is spread and acquired. How can you use technology to better communicate with grantees, each other and the community? Albert Ruesga, blogger extraordinaire, separates the webcasts from the webinars and Bluetooth from the blogs at this fun, interactive session.

#8: Recognizing Nonprofit Diamonds in the Rough

Moderator: Barbara R. Metzler, local author and entrepreneur

Bob McElroy, Alpha Project

Mary Catherine Swanson, Advancement Via Individual Determination (AVID)

Joani Wafer, Kids Korps USA

As a grantmaker, can you recognize true talent in potential grantees, or do you always play it safe? In this session, Barbara Metzler, author of Passionaries: Turning Compassion into Action, moderates a panel of three passionate and successful nonprofit leaders to discern how grantmakers can improve our chances of finding the next diamond. We will hear about their earliest funding challenges, how they overcame their organizations’ lack of track records, what that first grantmaker saw in them; and what we as grantmakers should look for in our grantees.

#9: Bridging the Divide between Philanthropy and Government

Encore presentation: see description on the previous page.

#10: Creating a Culture of Learning: Inspired Evaluation

Encore presentation: see description on the previous page.
The Legler Benbough Foundation recognizes the importance of San Diego Grantmakers to local grantmakers and to the community. We are proud to support the Annual Conference as an important part of the work of the organization.
Vision and Mission

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.

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

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.
• Integrity — We value and promote ethical grantmaking practices

Membership Benefits

Annual Conference
Events & Programs
Collaborations
Newsletters
Listservs
Special Discounts
Best Practices Information, Research & Policy Updates

History

San Diego Grantmakers was founded in 1976 to meet the need expressed by those in organized philanthropy for a forum in which colleagues could address common problems and interests. After many years of serving the San Diego grantmaking community, SDG moved into its next stage of evolution and established itself as an independent, freestanding nonprofit. In the fall of 1999, San Diego Grantmakers leadership filed for nonprofit status and incorporated as a 501(c)3 organization. San Diego Grantmakers is one of 32 members of the Forum of Regional Associations of Grantmakers, a valuable link to philanthropy across the country.

Eligibility

• Community Foundations
• Corporate Foundations and Giving Programs
• Family Foundations
• Giving Circles
• Government Grantmakers
• Independent Foundations
• Individual Philanthropists
• Operating Foundations
• Public Foundations

Guidelines

Membership is available to organizations and individuals whose primary purpose is grantmaking, who are currently making minimum annual contributions of $25,000 to multiple nonprofit organizations in an “organized manner.”
You’re Invited

You’re Invited

Year-End SDG Member Reception with County Supervisors Ron Roberts and Greg Cox

Charting Our Course: Planning for the Future of San Diego County

December 3, 2007
5:30-7:30pm

Junior Achievement BizTown
4756 Mission Gorge Place, San Diego, CA

$20 per person
RSVP to programs@sdgrantmakers.org

Celebrate the end of another successful year of grantmaking, mingle with fellow SDG members, and hear from San Diego County Supervisors Greg Cox and Ron Roberts as you check out the new Junior Achievement BizTown. BizTown is a lifesized interactive city that is designed to reflect San Diego’s businesses, landscape, and architecture. It was supported by a number of SDG members. Please join us!
SDG Collaborations

These are groups of members that work together to leverage the power of their giving: by pooling funds and making grant decisions together or “aligning” funding to some of the same grantees or simply having regular strategic discussions and presentations by experts. Each group is led by a member (or several members) of SDG. Below is the list of current collaborations and contact people — or contact Executive Director Nancy Jamison, nancy@sdgrantmakers.org. Many groups are still in the process of solidifying their charters and structures, so it’s a great time to get involved!

- **Homelessness Working Group**
  
  **Purpose:** To prevent and reduce homelessness in the San Diego region by enabling funders and other stakeholders to have greater impact through advocacy, collaboration and education.

  **Member Contact:** Mary Herron, The Parker Foundation, mherron@san.rr.com

- **San Diego Neighborhood Funders**
  
  **Purpose:** A collaboration of funders working together to support resident-led change in the Diamond Neighborhoods of southeastern San Diego.

  **Member Contacts:** Shirley Adams, Jacobs Center for Neighborhood Innovation, sadams@jacobscenter.org, Steve Eldred, The California Endowment, seldred@calendow.org, and Jennifer Vanica, Jacobs Center for Neighborhood Innovation, jvanica@jacobscenter.org.

- **Child Welfare**
  
  **Purpose:** A learning community of funders interested in supporting the needs of foster children. Currently identifying common funding opportunities.

  **Member Contact:** Jorge Cabrera, Casey Family Programs, jcabrera@casey.org

- **Education**
  
  **Purpose:** A learning community of funders interested in supporting public education. Currently identifying common funding opportunities.

  **Member Contact:** Sedra Shapiro, The San Diego Foundation, sedra@sdfoundation.org

- **San Diego Workforce Funders Collaborative**
  
  **Purpose:** A public/private partnership of philanthropic foundations, employers, and the State of California Employment Development Department working to create well-coordinated and well-financed solutions to the region’s workforce needs in the San Diego area.

  **Member Contact:** Sid Voorakkara, The California Endowment, svoorakkara@calendow.org

- **Nonprofit Leadership Development**
  
  **Purpose:** A learning community of funders interested in building the leadership capacity of San Diego nonprofits. Currently identifying common funding opportunities.

  **Member Contacts:** Janine Mason, Fieldstone Foundation, janinem@fieldstone-homes.com or Lori Finch, The San Diego Foundation, lori@sdfoundation.org

- **Prisoner Reentry**
  
  **Purpose:** A collaborative of funders interested in supporting and promoting strategies for ex-offenders to successfully reintegrate into San Diego neighborhoods.

  **Member Contact:** Judi Larsen, The California Endowment, jlarsen@calendow.org

- **Family Foundation Exchange**
  
  **Purpose:** The Family Foundation Exchange serves as a vehicle for family foundations to explore new avenues of grantmaking, gain skills and knowledge, and find support and encouragement among peers.

  **Member Contact:** Valerie Jacobs, Jacobs Family Foundation, vjacobs@cox.net
SDG Annual Conference Planning Committee

Co-Chairs:

Janine Mason  
Fieldstone Foundation  
Charlene Seidle  
Jewish Community Foundation

Members:

Jennifer Arrowsmith  
Qualcomm Incorporated  
Katherine Crow  
Alliance Healthcare Foundation  
Marissa Garfield  
Jewish Community Foundation  
Dixie Newman  
The Rose Foundation/WebMD Health Foundation  
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Membership 2007

Family Foundations: 26
BetterWorld Together Foundation
The Burnham Foundation
Change A Life Foundation
Contorer Foundation
DeFalco Family Foundation
Ellen G. and Edward G. Wong Family Foundation
The Galinson Family Foundation
Gary and Mary West Foundation
The Gem Foundation
J.W. Sefton Foundation
Jacobs Family Foundation*
Kenneth A. Picerne Foundation
McCarthy Family Foundation
Otto Family Foundation
Patricia and Christopher Weil Family Foundation
Project High Hopes
Pulido Walker Foundation
The Rice Family Foundation
The Rose Foundation
The Sanderson Family Foundation
Satterberg Foundation
Seeley Family Foundation
Toby Wells Foundation
Tuttleman Family Foundation
Wait Family Foundation*
The Westreich Foundation

Corporate Giving: 28
AMN Healthcare, Inc.
Amylin Pharmaceuticals, Inc.
Biosite
Chargers Community Foundation
Cox Communications
Cymer Corporation
Fieldstone Foundation
The Hitachi Foundation
Holland America Line
Invitrogen Corporation
The Jack in the Box Foundation
Kaiser Permanente
MBE, Inc/The UPS Store
Mission Federal Credit Union
Northern Trust Bank of California
Private Asset Management Inc. Foundation
QUALCOMM Incorporated*
San Diego National Bank*
The San Diego Union-Tribune
Sempra Energy*
Sony Electronics
Stemedica Foundation
Time Warner Cable
Union Bank of California Foundation
US Bank
Washington Mutual*
WebMD Health Foundation, Inc.
Wells Fargo

Private/Independent Foundations: 18
Alliance Healthcare Foundation
Boys and Girls Foundation
C.J. and Dot Stafford Memorial Trust
The California Endowment*
The California Wellness Foundation
Casey Family Programs
Foundation for Women
James Irvine Foundation*
The Legler Benbough Foundation*
Mandell Weiss Charitable Trust
Moxie Foundation
The Oak Tree Philanthropic Foundation
The Parker Foundation*
San Diego County Bar Foundation
San Diego County Medical Society Foundation
Seth Spragg Charitable Trust
The Thomas C. Ackerman Foundation
Weingart-Price Fund of the San Diego Foundation

Community Foundations: 9
Community Youth Foundation of the Jewish Community Fdn.
International Community Foundation
Jewish Community Foundation
Jewish Women’s Foundation
Rancho Santa Fe Foundation
The San Diego Foundation*
San Diego Foundation for Change
San Diego Human Dignity Foundation
San Marcos Community Foundation

Other: 8
California Council for the Humanities
Community Technology Foundation of California
First 5 Commission of San Diego
San Diego Commission for Arts & Culture
San Diego Social Venture Partners
San Diego Women’s Foundation
San Diego Workforce Partnership
United Way of San Diego County

Total Membership: 89
*Leadership Council Members

Collaborations and Working Groups: 7
Child Welfare
Education
Homelessness
Nonprofit Leadership Development
Prisoner Reentry
San Diego Neighborhood Funders
Workforce Development