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Welcome

Welcome to the San Diego Grantmakers 2008 Annual Conference! This year’s theme, *Mapping the Impact of San Diego Philanthropy*, offers an opportunity to engage with your peers in examining philanthropic trends in our region, and beyond. Our conference schedule has been designed to provide information, tools, skills and networking opportunities to strengthen your philanthropic efforts.

We are honored to present a roster of national and local experts who will share their knowledge and practices to inspire and energize your work. In addition, our conference site, the Joe and Vi Jacobs Center, serves as a vivid example of collaboration and community efforts to enhance the lives of local residents.

So where have we been and where do we go from here? How can we, as grantmakers, positively impact our community? What methods or strategies can we use to share the results of our work? How can we better connect with each other and with our grantees? These are questions we all ask ourselves at one time or another. As grantmakers, we all wish to make positive advances in the funding priorities of our organizations and in our community. On behalf of the Annual Conference Committee and the board and staff of San Diego Grantmakers, it is our hope that you come away from this year’s conference with a variety of strategies to help answer these questions. Thank you for joining us today!

All the best,

Debbie Williams  
*Annual Conference Chair*  
**J.W. Sefton Foundation**  

Nancy Jamison  
*Executive Director*  
**San Diego Grantmakers**
Proud sponsor of events that make you say...

Whoo hoo!

We’re excited to be part of events like San Diego Grantmakers Annual Conference and other programs that help build and strengthen the communities around us. To learn more, stop by your local WaMu, call 1-800-788-7000 or visit wamu.com.

Go with the people:
Live with them, learn from them, love them.

Start with what they know. Build with what they have.

When the job is done, the task accomplished,

People will say, ‘We have done this ourselves.’

— Lao Tsu, China (700 BC)
Mapping the Impact of San Diego Philanthropy
Conference Agenda

9:00-9:30am  Registration & Breakfast

9:30-10:45am  Welcome & Opening Plenary:
“Destination San Diego 2050: Back to Basics”
Joel Kotkin, an engaging speaker, futurist, and highly respected author
of The City: A Global History and a forthcoming book on trends shaping
America in 2050 (see full description on page 5)

11:00am-12:30pm  Morning Workshop (see pages 9 & 10 for options)

12:30-1:30pm  Networking Lunch
Featuring The Grantmaking Report: Foundation & Corporate Giving
in the San Diego Region

1:45-3:15pm  Afternoon Workshop (see page 11 for options)

3:30-4:30pm  Closing Plenary:
“Telling the Stories of San Diego Philanthropy”
Andy Goodman, a nationally recognized author, consultant and public interest
communications expert (see full description on page 7)

4:30-5:30pm  Closing Remarks & Wine Reception
Reception featuring multicultural entertainment and appetizers representing the cultures
of southeastern San Diego, hosted by Jacobs Center for Neighborhood Innovation, the
Neighborhood Unity Foundation, and the resident-led International Outreach Team
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 the community.

www.qualcomm.com/community

Health
Community
Family
Learning

First 5 San Diego is a partner to the health, education and social service providers of the region.

First 5 San Diego

Improving the lives of children ages 0 through 5.

www.first5sandiego.org
Opening Plenary: “Destination San Diego 2050: Back to Basics”

Joel Kotkin, an engaging speaker, futurist, and highly respected author of *The City: A Global History* and a forthcoming book on trends shaping America in 2050

As San Diego plans and prepares for our future, how can philanthropy provide leadership that results in solutions and contributes to an improved quality of life for all of our citizens? Joel Kotkin will address these issues with the following framework:

- Why philanthropy should pay more attention to the middle class and why class matters
- Why supporting job skill development is critical to a sustainable economy
- Why families are changing in ways that change the needs of communities
- Why the key to the region’s health lies in focusing on the needs of neighborhoods

Joel Kotkin, an internationally-recognized authority on global, economic, political and social trends, is Presidential Fellow in Urban Futures at Chapman University in Orange, California. He consults for many leading economic development organizations, private companies, regions and cities. Joel is also a Senior Fellow with the New America Foundation in Washington, DC; a Senior Fellow with the Center for an Urban Future in New York City; and a Senior Consultant with the Praxis Strategy Group in Fargo, North Dakota.


In addition to *The City: A Global History*, Kotkin is the author of *The New Geography: How the Digital Revolution is Reshaping the American Landscape; Tribes: How Race, Religion and Identity Determine Success in the New Global Economy*, and several other titles. Kotkin attended the University of California, Berkeley. A native New Yorker, he has lived in California since 1971. Kotkin lives in the Valley Village area of Los Angeles with his wife, Mandy Shamis, and two daughters.
We applaud

San Diego Grantmakers

on their commitment to effective philanthropy in the San Diego region.

The California Wellness Foundation is an independent, private foundation, created in 1992, whose mission is to improve the health of the people of California by making grants for health promotion, wellness education and disease prevention.

www.tcwf.org

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

4950 Murphy Canyon Road
San Diego, CA 92123
(858) 279-2740

www.jcfsandiego.org
Since we first began talking to each other, telling stories has been an effective way to capture attention, engage an audience, and motivate them to act. In the public interest sector, though, translating complex issues, goals that are often intangible and abstract ideas into a good story can be a daunting challenge. Modern technology has given us shiny new tools to help us communicate—from PowerPoint to podcasts—but in our fervor to remain current (and appear professional) we often ignore our natural inclination to tell a good story. In this plenary, Andy Goodman will explain why he believes storytelling is the single most powerful communication tool grantmakers possess, and he will offer specific ways your organization can use stories to advance your mission.

Andy Goodman is a nationally recognized author, speaker and consultant in the field of public interest communications. Along with the book, Storytelling as Best Practice, he is author of Why Bad Ads Happen to Good Causes and Why Bad Presentations Happen to Good Causes. He also publishes a monthly journal, free-range thinking, to share best practices in the field.

Andy is best known for his speeches and workshops on storytelling, presenting, design and strategic communications, and has been invited to speak at Harvard’s Kennedy School of Government, the Woodrow Wilson School of Public Affairs at Princeton, as well as at major foundation and nonprofit conferences. He currently serves on the faculty of the Communications Leadership Institute, which trains nonprofit executive directors and grantmakers.

In 2007, he was selected by Al Gore to train 1,000 people who are currently conducting presentations on global warming throughout the US and around the world. And this year he co-founded The Goodman Center to offer online versions of his workshops and additional communications and marketing classes to nonprofits, foundations, government agencies and educational institutions across the U.S. and worldwide. To learn more about his work, please visit www.agoodmanonline.com and www.thegoodmancenter.com. When not teaching, traveling, or recovering from teaching and traveling, Andy also serves as a Senior Fellow for Civic Ventures and is on the advisory boards of VolunteerMatch and Great Nonprofits.
#1: The Journey of Family Philanthropy: Making Every Generation Count

Stephanie Yang, Founder, SYD Consulting  
Lisa Parker, President, Lawrence Welk Family Foundation  
Shirley Fredricks, Vice President & Trustee, The Lawrence Welk Family Foundation

Engaging in intergenerational family philanthropy provides an opportunity to share values, strategies, and creativity for impacting your community. Hear from experts and other families like your own on how to map the steps for your grant-making’s long-term impact; why multi-generational philanthropy is critical for success; and how your giving experience shapes San Diego’s future. Explore trends, tools, and resources to recognize your family philanthropy’s strengths now and plan for generations to come. Family foundations, donor-advised funds, and individual philanthropists are welcome.

#2: Finding the Route for Your Corporate Giving Strategy

Ophelia Basgal, Vice President, Civic Partnerships and Community Initiatives, Pacific Gas & Electric Company  
Renata Hron Gomez, Senior Program Officer, The Hitachi Foundation

Globally, ever-growing numbers of social issues cause communities, employees, and other stakeholders to expect corporate philanthropy to do its part in addressing these needs. The San Diego region is no exception. How can corporate giving programs and foundations reconcile external expectations and needs with their own internal strategic plans? In this session, we will address the challenges of balancing the needs and wants of multiple stakeholders to resolve the tension between “charity” and “strategic philanthropy.”

#3: A Basic Roadmap for Grant Evaluation

Jennifer James, Vice President, Harder+Company

What are the best ways to measure the impact of your grants? This session, led by an expert in evaluation, research, and technical assistance, offers an overview for creating an effective evaluation strategy. You will leave the session with practical tools and knowledge about structuring evaluations; an understanding of what can and cannot be accomplished through evaluation; how to use evaluation results; and, innovative ways to develop evaluation capacity for the benefit of our community.

#4: Navigating to Great Nonprofits

Perla Ni, CEO, GreatNonprofits  
Dan Moore, Vice President, Public Affairs, GuideStar

Are you sometimes overwhelmed by the number of nonprofit organizations out there? How can you find the most effective nonprofits so that your grants will make a real difference in our community? This session will explore tools available to help grantmakers identify, review, and invest in strong organizations. GuideStar’s mission is to revolutionize philanthropy and nonprofit practice by advancing transparency and encouraging giving. GreatNonprofits is a place to discuss great—and perhaps not yet great—groups, modeled as an online “Zagat”-style guide for our sector.
#5: Pathways to Diversity in Philanthropy

Henry A.J. Ramos, Director and Lead Consultant, Diversity in Philanthropy Project and Principal, Mauer Kunst Consulting  
Renée B. Branch, Director of Diversity and Inclusive Practices, Council on Foundations

Recent months have surfaced renewed questions about the best ways for organized philanthropy to advance effectiveness through diversity, following growing demands in some quarters for public regulation of our profession on the issues. Addressing diversity is thus a growing imperative in our field today, but what does it actually mean in the context of our work: where the grants go, who receives them, who gives them, funder business practices? Join us to learn from two leading professionals about national efforts to answer these questions and why they matter for your organization.

#6: Trying to Turn the Corner: The Economy, Poverty and Philanthropy

Donald Cohen, President and Executive Director, Center for Policy Initiatives  
Fred J. Ali, President & CEO, Weingart Foundation  
Ann Tartre, Senior Advisor, Community Giving Resource

When the economy is challenged—due to the mortgage crisis, rising costs, job loss, and more—San Diego citizens in poverty become even more vulnerable. How can grantmakers help social service nonprofits that are struggling to serve more clients? Can funders be a voice for policies that improve government services even as government dollars are diminishing? What are the most critical issues facing San Diego? Our speakers will bring varying perspectives to this urgent situation in our community, providing suggestions for things you can do to make a difference.
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.

J.W. Sefton Foundation is pleased to support San Diego Grantmakers and the 2008 Annual Conference.

Alliance Healthcare Foundation is pleased to support the 2008 SDG Annual Meeting

www.alliancehf.org
Afternoon Workshop Options

#7: The Advocacy Adventure: Leveraging Funding for Greater Impact
Gigi Barsoum, Health Policy Specialist, The California Endowment
John Fanestil, Executive Director, Foundation for Change
Diane Takvorian, Executive Director, Environmental Health Coalition

In difficult times, funders must be innovative and efficient in order to get the most out of our investments. Many grantmakers have integrated advocacy into their funding strategies to create a more meaningful and long-lasting impact. A large statewide foundation and a smaller grassroots foundation will share lessons learned and best practices for funding advocacy efforts and building the capacity of community organizations to engage in advocacy. Plus, you will hear from a grantee about how their activities have helped to enact better policies.

#8: San Diego’s Geographic Imperative: Cross-Border Philanthropy
Julieta Mendez, Program Officer for Health & Human Services, International Community Foundation (ICF)
Miguel Aldrete, donor, Legacy4Life Fund at ICF
Frank Lalle, Program Director, The California Wellness Foundation
Andrew Carey, Executive Director, Border Philanthropy Partnership

San Diego’s shared border with Mexico creates a multitude of issues, opportunities and emerging challenges with the potential to divide or unite the people of these two regions. How can grantmakers better understand the impact of the border in creating bi-national connections? This session will bring together experts and funders to explore growing cross-border interdependencies in areas of health, human services, education and the environment, and how philanthropy can make a difference in each region.

#9: Funders Traveling Together: Collaborative Grantmaking
Edward B. Kacic, President and CEO, Irvine Health Foundation
Peter Ellsworth, President, The Legler Benbough Foundation
Sid Voorakkara, Program Officer, The California Endowment & SD Workforce Funders Collaborative
Katherine Crow, San Diego HIV Funding Collaborative

Did you know that SDG currently facilitates a wide range of funder collaborations and working groups? In this session, a diverse cadre of grantmakers will discuss the impact of collaborative grantmaking, including focused approaches, reduced redundancy, and greater leverage of funds. You will hear about both the successes and challenges of this kind of funding, from local, state, and national perspectives.

#10: Navigating to Great Nonprofits
Encore presentation: see description under Morning Workshop Options.

#11: Pathways to Diversity in Philanthropy
Encore presentation: see description under Morning Workshop Options.

#12: Trying to Turn the Corner: The Economy, Poverty and Philanthropy
Encore presentation: see description under Morning Workshop Options.
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.”
SDG Annual Conference Planning Committee

Chair:
Debbie Williams
J.W. Sefton Foundation

Members:
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Jacobs Center for Neighborhood Innovation
Katherine Crow
WebMD Health Foundation and The Rose Foundation
Lori Finch
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Jacquie Ibrahim
The San Diego Women’s Foundation
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Funder Collaboration Consultant
Emily Davis
Annual Conference Consultant
Membership 2008

Family Foundations: 26
Alex Smith Foundation
Balsells Foundation
BetterWorld Together Foundation
The Burnham Foundation
Change A Life Foundation
Clare Rose Foundation
Contorer Foundation
Ellen G. and Edward G. Wong Family Foundation
The Galinson Family Foundation
George-Straley Foundation
J.W. Sefton Foundation*
Jacobs Family Foundation*
McCarthy Family Foundation
Otto Family Foundation
The Patricia and Christopher Weil Family Foundation
Nierman Family Foundation
Project High Hopes
Pullido Walker Foundation
The Rice Family Foundation
The Rose Foundation
The Ronald Simon Family Foundation
Satterberg Foundation
Sekely Family Foundation
Toby Wells Foundation
Tuttleman Family Foundation
The Westreich Foundation
The Jack in the Box Foundation
Kaiser Permanente
Mission Federal Credit Union
Northern Trust, NA
QUALCOMM Incorporated*
San Diego National Bank*
Sempra Energy*
Sony Electronics
Time Warner Cable
Union Bank of California Foundation
US Bank
Washington Mutual*
WebMD Health Foundation, Inc.

Private/Independent Foundations: 21
Alliance Healthcare Foundation
C.J. and Dot Stafford Memorial Trust
The California Endowment*
The California Wellness Foundation*
Casey Family Programs Foundation for Women
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The Oak Tree Philanthropic Foundation
The Parker Foundation*
San Diego County Bar Foundation
San Diego County Medical Society Foundation
Seth Sprague Educational and Charitable Foundation
The Thomas C. Ackerman Foundation
Weingart-Price Fund of the San Diego Foundation

Community Foundations: 10
International Community Foundation
Jewish Community Foundation*
Jewish Women’s Foundation
Neighborhood Unity Foundation
Rancho Santa Fe Foundation
The San Diego Foundation*
San Diego Foundation for Change
San Diego Human Dignity Foundation
San Marcos Community Foundation
Youth Philanthropy at the Jewish Community Foundation

Other: 8
California Council for the Humanities
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
ZeroDivide

Total Membership: 88
*Leadership Council Members providing support to SDG in the amount of $10,000 or more

Collaborations and Working Groups:
Child Welfare Funders
Education Funders
Homelessness Working Group
Coming Home to Stay Project
San Diego Neighborhood Funders
Workforce Development Funders
Family Foundation Exchange