

San Diego Grantmakers Strategic Plan 2006 – 2008

Mission

To connect, educate, develop and inspire a diverse group of foundations and corporations to stimulate effective philanthropy in the San Diego region.

Vision

A vibrant, effective and growing philanthropic community that improves the quality of life in the San Diego region.

Values

Excellence, Service, Collaboration, Celebration, Inclusiveness, and Integrity.

Intended Results

- San Diego Grantmakers is an acknowledged regional leader in the development of effective philanthropy and the inspiration of increased philanthropy.
 - Membership is highly valued and sought after by foundations and corporate giving programs – we are a “must join” organization.
 - Collaborations among our members and partnerships with other key San Diego organizations – public and private - have led to identifiable improvements in the well being of our region.
- Our internal structures and processes reflect the recognized best practices for running a nonprofit Regional Association.

Focus Area #1 Valued Service

SDG provides programming, communication and support modeled on the very best of other Regional Associations and customized to fit the needs of our own members.

Strategies:

1. Schedule regular networking sessions and build networking into all SDG programs. (2006)
2. Coordinate increased funder working groups and collaboratives – sub-groups that will strengthen the value of and SDG involvement and help leverage funding. (2006)
3. Identify best ways to combine/ with other San Diego organizations with similar educational missions (i.e. -SVP, TSDF, JCF, SDWF). (2006)
4. Establish a Family Foundation Exchange: ongoing peer network/learning circle. (2006)
5. Use online mechanisms and technology to connect members virtually, through Grants Directory and other means such as teleconferences or pod casts. (2007)
6. Coordinate member championed issues briefings on specific giving areas (minimum of 3 member supporters for each session) (2007)
7. Enhance Corporate programming and corporate member connection through increased events/networking. (2007)
8. Launch Grantmaking Skill Development with enhanced utilization of information provided by the Forum and other regional associations. (2007)

Focus Area #2: Vibrant Leadership

SDG is an exemplary leader on behalf of philanthropy and the nonprofit sector in the San Diego region.

Strategies:

A. Support nonprofit sector improvement initiatives

SDG supports the development of the San Diego nonprofit sector and its infrastructure with partners that are engaged in this work. Our efforts will enhance the positive community impact of our members' giving.

1. Proactively work with local organizations with similar missions, including but not limited to, The San Diego Foundation, Social Venture Partners, SANDAN, USD Center for Applied Nonprofit Research, Nonprofit Management Solutions and the Nonprofit Infrastructure Alliance. (2006)
2. Educate SDG members on nonprofit capacity building and sustainability funding (2007)

B. Accountability and Effectiveness

SDG raises the bar on accountability and ethical practices among grantmakers in the San Diego region.

1. Launch a strategy to inspire and involve SDG members in the development of Guiding Principles. (2007)
2. Establish a set of Guiding Principles for our members with appropriate member accountability requirements. (2007)
3. Provide tools for members to measure and assess how they are doing on legal requirements and best grantmaking practices. (2008)

C. Local Issues Experts

SDG engages local and national philanthropy in proactively addressing critical issues and improving conditions in the San Diego region

1. Establish relationships with local public sector officials to work together on projects of mutual interest, i.e. mayor, assembly, congress. (2007)
2. Support and spearhead the development of useful research on the needs of our nonprofit sector and the state of giving in San Diego. (2007)

D. Connection with other CA Regional Associations

SDG establishes strong collaborations with NCG and SCG to positively impact the power of philanthropy in the state of California.

1. Participate in statewide advocacy efforts by working with NCG on their initiative. (2007)

<p>Focus Area #3: Vocal Visibility</p> <p>SDG increases the visibility of philanthropy and the public understanding of its impact on the San Diego region in order to promote the work of our member funders, nonprofits – as well as to inspire new grantmakers</p>	<p>Strategies:</p> <p>Develop and begin implementation of a comprehensive strategy to increase SDG/member public presence – including press and speaking engagements.</p> <ol style="list-style-type: none"> 1. Submit opinion pieces, columns in local papers focused on giving and issues important to grantmakers. (2006) 2. Join in mutually beneficial positive press efforts about nonprofit and nonprofit giving with SANDAN, USD, NMS and SDG members. (2007) 3. Have speaking engagements with community groups representing current and future funders. (2007) 4. Work with local media to create special focus and recognition of funders, e.g. Corporate Philanthropy Supplement in the San Diego Business Journal (2007) 5. Develop press releases on SDG member activities, e.g. collaborations (2008)
<p>Focus Area #4: Vigorous Growth</p> <p>SDG grows and sustains a diverse and engaged membership in order to expand the power of organized philanthropy in SD</p>	<p>Strategies:</p> <p>Instigate strategies to increase the number of groups involved in organized philanthropy and expand SDG membership.</p> <ol style="list-style-type: none"> 1. Family: Create opportunities for non-SDG members to hear about SDG– i.e. joint family philanthropy outreach program with community foundations. (2007) 2. Corporate: Use programs to invite prospects and involve current members in soliciting new members; work with local business groups to promote philanthropy (Chambers of Commerce, CONNECT, BIOCUM, etc). (2007) 3. Community: meet with San Diego non-member community foundations to identify what their needs are and design support accordingly. (2007) 4. Identify ways to develop NEW DONOR groups in San Diego- women, ethnic funds, giving circles. (2007) 5. Do outreach to Professional Advisors and explore ways to add new member categories. (2008)
<p>Focus Area # 5: Vital Sustainability and Infrastructure</p> <p>SDG is an effectively managed and financially sound organization to ensure that we can support future generations of philanthropy.</p>	<p>Strategies:</p> <p>A. Financial Strength</p> <ol style="list-style-type: none"> 1. Conduct a Financial Audit/Review. (2006) 2. Design a membership dues increase plan. (2006) 3. Develop new revenue streams (i.e. Grants, Fees, Sponsorships) (2006) 4. Formalize a new member recruitment system and integrate into SDG monthly work goals. (2007) 5. Standardize Internal fiscal policies and practices to meet the highest level of accountability and oversight. (2007) <p>B. Board Governance</p> <ol style="list-style-type: none"> 1. Put board development processes in place to ensure that we develop a board that is engaged and committed to the SDG mission and vision. (2006) <p>C. Operational Improvement</p> <ol style="list-style-type: none"> 1. Streamline and enhance SDG member and prospect database and member renewal process by using technology provided by the Forum. (2007) 2. Improve SDG communication pieces for use with members, outreach to new members and the community. (2007) 3. Adopt best practices in personnel policies and procedures. (2007)

NOTE: (Year) denotes when the strategy has been or will be initially launched.