

SAN DIEGO GRANTMAKERS 2005-2006 BIENNIAL REPORT

FINANCIAL INFORMATION

Statement of Income & Expenses

| OPERATING BUDGET | 2005 | 2006 |
|---|----------------|----------------|
| REVENUE | | |
| Membership Support | 125,900 | 128,375 |
| Additional Support | 28,550 | 15,850 |
| Program Sponsorships & Fees | 26,986 | 54,905 |
| Grants—Programs | 8,172 | 17,500 |
| Grants—Homelessness Working Group | 4,000 | 2,400 |
| Grants—COF '05 Host Committee | 48,500 | 5,283 |
| Interest Income | 3,681 | 3,517 |
| In-Kind Revenue—San Diego National Bank | 15,000 | 15,000 |
| In-Kind Equipment | 1,000 | — |
| Miscellaneous | — | 1,766 |
| TOTAL | 261,789 | 244,596 |
| EXPENSES | | |
| Annual Conference & Distinguished Speaker | 4,734 | 19,362 |
| Educational Programs | 15,071 | 7,510 |
| COF '05 Host Committee | 127,658 | — |
| Personnel | 157,689 | 131,768 |
| Newsletter & Communications | 5,510 | 2,705 |
| Web Development & Maintenance | 5,005 | 6,190 |
| Supplies | 1,849 | 1,585 |
| Equipment & Maintenance | 131 | 1,609 |
| Insurance | 1,922 | 2,043 |
| Professional Fees—Consultants | 5,471 | — |
| Professional Development | 275 | 200 |
| Conferences | 911 | 3,977 |
| Travel | 1,296 | 887 |
| Meetings | 1,676 | 1,427 |
| Books, Dues & Subscriptions | 1,356 | 1,283 |
| Rent & Utilities | 15,000 | 15,000 |
| Forum of Regional Associations | 2,211 | 2,226 |
| Philanthropy Day Sponsorship | 2,500 | 2,500 |
| Accounting & Bookkeeping | 4,225 | 8,201 |
| Depreciation | 2,501 | 890 |
| Legal/Licenses | 329 | 420 |
| Parking | 2,358 | 3,700 |
| Phone | 669 | 814 |
| TOTAL | 360,347 | 214,297 |

Board of Directors 2005-2007

Gregory Hall, Chair 2007
Treasurer and Vice Chair 2006
Treasurer 2005
The California Endowment

Allison Kelly, Chair 2006
Secretary 2005
Qualcomm Incorporated

*Robert Kelly, Chair 2005
The San Diego Foundation

Valerie Jacobs, Chair-Elect 2007
Jacobs Family Foundation

*Phil White, Vice Chair 2005
The Hamilton-White Foundation

Doug Sawyer, Treasurer 2007
United Way of San Diego County

***Jan Tuttleman, Secretary 2007
Jewish Community Foundation

Joanne Pastula, Secretary 2006, 2007
The Thomas C. Ackerman Foundation

**Ann Bossler
Price Charities

*Peter Ellsworth
Legler Benbough Foundation

***Julie Fry
The San Diego Foundation

Richard Kiy
International Community Foundation

Janine Mason
Fieldstone Foundation

**Tim McCarthy
McCarthy Family Foundation

**Judy McDonald
The Parker Foundation

Kathy Patoff
Union Bank of California

Kelly Prasser
Sempra Energy

*Ruth Lyn Riedel, Ph.D.
Alliance Healthcare Foundation

Alan Sorkin
San Diego Social Venture Partners

Christopher Weil
The Patricia and Christopher Weil
Family Foundation

*Retired from SDG Board 2005
**Retired from SDG Board 2006
***Retired from SDG Board 2007

Staff

Nancy Jamison, Executive Director
Phyllis Levine, Director of Programs
Meghan Duffy, Program Associate

MEMBERS, 2005-2007

FAMILY FOUNDATIONS

BetterWorld Together Foundation
The Burnham Foundation
Change A Life Foundation
Clare Rose 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
The Hamilton-White Foundation
J.W. Sefton Foundation
*Jacobs Family Foundation**
Kenneth A. Picerne Foundation
Lawrence Welk Family Foundation
McCarthy Family Foundation
Nierman 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
Szekely Family Foundation
Toby Wells Foundation
Tuttleman Family Foundation
*Waitt Family Foundation**
The Westreich Foundation
Wheatley Foundation

CORPORATE GIVING

10,000 RV Sales, Inc.
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
Viejas Enterprises
*Washington Mutual**
WebMD Health Foundation, Inc.
Wells Fargo

PRIVATE/INDEPENDENT FOUNDATIONS

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**
Junior Seau 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

Community Youth Foundation of the Jewish Community Foundation
Fundacion Internacional de la Comunidad, A.C.
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

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

**Leadership Council Members*

SPONSORS

LEADERSHIP COUNCIL

The Leadership Council is a group of organizations that invest in SDG at a level higher than the standard membership support, enabling us to fulfill our broader mission to strengthen philanthropy in San Diego.

The California Endowment
Jacobs Family Foundation/Jacobs Center for Neighborhood Innovation
The James Irvine Foundation
Jewish Community Foundation
The Legler Benbough Foundation
The Parker Foundation
Qualcomm Incorporated
The San Diego Foundation
San Diego National Bank
Sempra Energy
Waitt Family Foundation
Washington Mutual

2006 ANNUAL CONFERENCE SPONSORS

The California Endowment
Casey Family Programs
Change a Life Foundation
Fieldstone Foundation
Halbert Hargrove
James Irvine Foundation
Jewish Community Foundation
Kenneth A. Picerne Foundation
The Legler Benbough Foundation
McCarthy Family Foundation
Nonprofit Management Solutions
The Parker Foundation
The Rose Foundation/WebMD Health Foundation
Qualcomm Incorporated
San Diego Chargers Community Foundation
The San Diego Foundation Chair/CEO Fund
San Diego National Bank
San Diego Neighborhood Funders and Jacobs Center for Neighborhood Innovation
Sempra Energy
Sonnenberg & Company, CPAs
Union Bank of California
University of San Diego Nonprofit Leadership & Management Program
Waitt Family Foundation
Washington Mutual

OTHER SPONSORSHIP SUPPORT, 2005-2006

Alliance Healthcare Foundation
Amylin Pharmaceuticals, Inc.
Ellen G. and Edward G. Wong Family Foundation
Fieldstone Foundation
Forum of Regional Associations of Grantmakers
Hamilton-White Foundation
Jewish Community Foundation
McCarthy Family Foundation
Mission Federal Credit Union
San Diego Chargers Community Foundation
Time Warner Cable
Toby Wells Foundation
United Way of San Diego County
Weingart-Price Fund at The San Diego Foundation

san diego
Grantmakers
Strengthening Philanthropy