

SDGrantmakers: How We are Doing

MEMBER SURVEY HIGHLIGHTS

Recently SDGrantmakers' members were asked to provide feedback on the programs and services we currently provide, as well as those that we are considering adding. 71 people responded to the survey. Below is an overview of the responses.

THE PRESENT: WHAT WE ARE DOING

Members were asked *When you think of San Diego Grantmakers, what's the first thing that comes to mind?*

It's not surprising that the most popular response was "education" and "educational programs." The second and third most common responses were "networking" and "information."

- 88% used educational programs and workshops making it the most frequently used service with 40% attending programs regularly
- All (100%) rated educational programs as either excellent or good
- 85% use the newsletter and 74% use the website

THE FUTURE: WHAT WE COULD BE DOING

SDGrantmakers' vision is to build a strong philanthropic community strengthened by our vibrant leadership. Members gauge the value of expanded member services.

- Survey respondents rated *sample documents* and *consultant services* as the most valued potential services
- 96% rated *promoting philanthropy by educating the public about grantmakers' contributions to citizens and society at large* as adding value to our respective work
- 98% of respondents rated *providing reports that identify the impact of giving in San Diego* as valuable
- *Advocating for philanthropy by representing grantmakers interests/concerns with state/national governments* received a 96% positive rating



SAN DIEGO GRANTMAKERS PHILANTHROPY LINK

We encourage members to contribute suggestions, articles ideas, news items, and personnel changes. Submit items or ideas to Link@SDGrantmakers.org or mail to the our office.

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Strengthening Philanthropy

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SEPTEMBER 2002

San Diego Grantmakers

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.

See inside for more information about collaborative efforts in San Diego.

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This Issue: Collaboration

COLLABORATION

Origin: *com laborare* (Latin)

The coming together to work and cooperate.

With the evolution and growth of philanthropy, collaboration has evolved from a tactic to a strategy and value.

Benefits of collaboration include leveraged dollars, participation in projects larger in scope than individual projects, shared learnings, and diversified risk.

Investing in community is the essence of our work, but it is in developing non-profit partnerships that our work is done. Because

building partnerships with nonprofit agencies is the foundation of our business, the focus on partnership translates itself to partnerships and collaborations beyond nonprofit partners to both community and funding colleagues.

Collaborations pool resources including knowledge, research, models, and funding.

Collaboration adds to the diversity of discussion, brainstorming, and problem solving. It allows grantmakers to diversify the risk often assumed as they attempt to affect controversial or intractable societal problems. While mitigating risk, collaborations leverage efforts and allow grantmakers to develop a critical mass of funds and energy. Funder collaborations often have the clout to gather key players in a community to bring priority attention to critical community issues. In addition, they can increase the potential of outside funds: national funders and government agencies are more likely to provide support or match dollars to efforts backed by a collaboration of funders.

COLLABORATION — GUEST REMARKS BY

LAUREN LEROY, PH.D., PRESIDENT AND CEO OF GRANTMAKERS IN HEALTH

The terms *collaboration* and *partnership* have become so overused that they have moved from couture to off-the-rack status. And that's too bad, because we run the risk of organizations paying lip service to the concept, programs masquerading as collaboratives, and diminished value being placed on the benefits that can be realized through the true hard work of collaboration.

REAL COLLABORATION

In his research, *Real Collaboration*, David LaPiana outlines important aspects of successful collaborative efforts. Real collaboration:

- necessarily involves working closely together on substantial content-laden issues. It is inherently interactive. It may entail conflict, but it must involve engagement.
- is relationship-based; it requires that the partners get to know one another well enough to develop trust and a deep commitment to work together.
- takes time.
- is painful and difficult to achieve. Conflict and stress arise, because they are often byproducts of engagement. They are also healthy signs in a collaborative; they are preferable to distance and lack of engagement.

Collaboration: it's more than a buzzword, it's a call to action to work collectively to achieve more together than we ever could on our own.

COLLABORATING IN SAN DIEGO

SDGrantmakers is committed to fostering a culture of discovery, exploration, and innovation in philanthropy. Collaborating is one of the critical instigators of change. This newsletter reports on collaboration in philanthropy in general, and in San Diego specifically. We invite you to investigate current collaborative efforts and to explore future collaborative opportunities.

Col•lab•o•rate (kə lab'ə rāt) *n.* to work jointly with others.

Col•lab•o•ra•tion (kə lab'ə rā' shən) *n.* 1. the act or process of collaborating. 2. a product resulting from collaboration.



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The Syntetic Foundation

*San Diego
Grantmakers
Would like to
welcome our
Newest Member . . .*

• **UNION BANK**

How to Get Involved: San Diego Collaborations

Efforts to support current collaborations and to catalyze discussions on new collaborations, include:

- September 18 and November 6 SDGrantmakers hosts two funder roundtables on homelessness. This is an excellent opportunity to explore collaborative options to solving San Diego's homeless problem. (Details in the calendar section.)
- *Collaborations at Work: SDGrantmakers' Networking Breakfast*, November 22. Bring your favorite program to the table – share it with your colleagues and discover new opportunities.
- San Diego Neighborhood Funders is an active funding collaborative. Be our guest at the next planning meeting to witness collaboration at work.
- Coordinate with fellow grantmakers around topics in line with your organization's goals. Contact SDGrantmakers to start a conversation and/or funders roundtable – or use the SDGrantmakers' listserv to talk amongst your peers, Members@SDGrantmakers.org

SDGrantmakers' members are involved in a number of different collaborative efforts, both currently and in the past. Below are a few examples. If you would like any more information regarding the following collaborations please contact Sharla Meeks at Sharla@SDGrantmakers.org or 619/744-2180.

ALLIANCE HEALTHCARE FOUNDATION

- Two current collaborative funding grants with The Robert Wood Johnson Foundation's Local Initiative Funding Partners (RWJF-LIFP), both co-funded by The California Endowment and Parker Foundation
 - ~ One is Project ESSEA, a mental health program for East African immigrants and refugees
 - ~ The second is a wound care clinic for injecting drug users
- Currently working on another collaboration with RWJF-LIFP to provide supportive services for seniors in the Senior Community Center's new Market Square housing project. Seeking other collaborating funders for this project

MCCARTHY FAMILY FOUNDATION

- The San Diego HIV Funding Collaborative (formerly San Diego Grantmakers AIDS Collaboration); Alliance Healthcare Foundation is the current fiscal sponsor
- Participated with other funders supporting the launch of the Children's Initiative
- Periodically, funded in collaboration with others the Outcomes Measurement program and Information Superhighway project (both at United Way)
- Collaborated with Alliance Healthcare Foundation on research on philanthropy in San Diego in 1998

SAN DIEGO HUMAN DIGNITY FOUNDATION

- Partner in the San Diego Lesbian and Gay Funding Partnership with The San Diego Foundation, New York Funders For Lesbian and Gay Issues, and The California Endowment. September 2001, the partnership passed out over \$150,000. This September the partnership will be passing out another 150,000 or more. All monies are passed out to organizations in San Diego County.

SAN DIEGO FOUNDATION FOR CHANGE

- Collaborations with San Diego Neighborhood Funders and the San Diego Lesbian and Gay Funding Partnership
- Beginning stages of a technical assistance collaboration with Waitt Family Foundation

WILLIAM E. SCHMIDT FOUNDATION

- The New Harmony Project, a gathering of film makers, screen writers, and poets who take two weeks off from money making contracts in Hollywood and let their creative juices flow. Many other foundations contribute to this workshop
- Supports a first prize piano for the H.B. Goodlin Foundation. It takes approximately \$64,000 from the Schmidt Foundation to fund the first prize of \$3,200 for a talented San Diego County organist or pianist

THE SAN DIEGO FOUNDATION

The goal of The San Diego Foundation is to improve the quality of life within all of our communities by promoting and increasing responsible and effective philanthropy.

FOLLOWING ARE AREAS AVAILABLE FOR COLLABORATION:

- **Civil Society:** To create a more inclusive and connected region by encouraging individuals and communities to actively participate in the political, civic and neighborhood affairs of our region. For additional information please contact Patricia Sinay at patricia@sdfoundation.org.
- **Environment:** To build, preserve and protect the environmental quality of the San Diego region. For additional information please contact Dr. Emily Young at eyoung@sdfoundation.org.
- **Health and Human Services:** To promote the physical, psychological and social health and well

CONTINUED ON NEXT PAGE

How to Get Involved ...

AREAS AVAILABLE FOR COLLABORATION

CONTINUED FROM PREVIOUS PAGE

being of all people living in San Diego County. Please contact Walter Sandford at walter@sdfoundation.org for additional information.

- **Neighborhood Civic Fund:** To support efforts by neighborhood groups to increase the number of people who volunteer to improve the community they live in. Please contact Patricia Sinay at patricia@sdfoundation.org for additional information.
- **Organizational Success Program:** To strengthen the organizational capacity of community organizations and neighborhood groups based in San Diego to carry out their missions. Please contact Patricia Sinay at patricia@sdfoundation.org for additional information.
- **Science and Technology:** To promote the understanding and application of technology, math and science in the San Diego region. Please contact Dr. Ned Smith at ned@sdfoundation.org for additional information.
- **The San Diego Teachers' Fund:** To provide grants to elementary public school teachers who develop creative and innovative projects for classroom use. Please contact Maggie Maag at maggie@sdfoundation.org for additional information.
- **Funding Information Center:** A library for nonprofits which contains comprehensive information on government, corporate and foundation funding sources as well as on fundraising, proposal writing, organizational management, and other issues relevant to nonprofit agencies. Located at The San Diego Foundations' downtown offices, the use of the center is free and open to the public during normal business hours. Please contact Maggie Maag at maggie@sdfoundation.org for additional information.

Guest Remarks ... CONTINUED FROM PAGE 1

WHAT IS COLLABORATION?

There actually is little about the value and challenges of collaboration that grantmakers don't already know; that all of us don't intuitively understand from our own lives. Marriage, family, friendship, how we work, and the ways we play involve us in collaborative activities every day. We teach our children, as we were taught, key elements of collaboration: trust, sharing listening, teamwork, finding satisfaction in the accomplishments of the group rather than being singled out for credit. So why is it so hard to carry these concepts and practices into the work of philanthropy and community action?

Having a common understanding of what we mean by collaboration seems to be a good place to start. A legalistic definition paints collaboration as close cooperation among parties having specified joint rights and responsibilities. One of my favorite characterizations is Suzanne Morse's "community amoxicillin" – or, in other words, "panacea" – of the 1990s. She also views collaboration as simply "thinking and acting differently," something that may be a key element in successful partnerships. The description that probably best captures the essence of collaboration is this: *the sharing of resources, responsibilities, and risks to achieve a common purpose* (Himmelman 1995).

In an essay about five years ago, Morse argued that, "collaboration, like jazz, was an American art form that evolved from a less formal attitude to a formal set of steps and procedures." She went on to quote from an interview in *American Heritage* in which Wynton Marsalis described the musical and nonmusical attributes of jazz, creating a most memorable analogy.

Like jazz, collaboration calls for "the willingness to play with a theme or concept," and an openness to cooperation and feedback. To be effective, collaborators, like jazz musicians, must be able to "reconcile differences even when they're opposites." And they must learn to have "dialogue with integrity."

Collaboration has elements of the blues, "an optimism that's not naïve." It shares with swing the need for "constant coordination, in an environment that's difficult enough to challenge your equilibrium." Collaboration calls for syncopation, asking its players to "always [be] prepared to do the unexpected, always [be] ready to find your equilibrium."

What's clear is that no single definition can convey the range and texture of the relationships involved in collaboration. **CONTINUED ON PAGE 5**

Collaboration Continuum

1. COLLEGIAL
EXCHANGE



2. CO-FUNDING



3. FUNDING ANOTHER
FUNDER'S INITIATIVE



4. JOINT
INITIATIVE



5. FUNDERS'
COLLABORATIVE

1. **Collegial Exchange:** Sharing information on an informal basis with other funders about grantees, developments in the field, grantmaking strategies and lessons learned, and more formal convenings to discuss joint project ideas or lessons learned.
2. **Co-funding:** Each funder contributes dollars independently to support the same project. There may be only limited communication among the "partners" even though they are jointly funding the same agency.
3. **Funding Another Funder's Initiative:** An agreement to support a portion of a grantmaking initiative undertaken by another foundation. In this case, the funder makes a conscious decision to play a secondary role to help implement someone else's idea.
4. **Joint Initiative:** Two foundations jointly conceive, fund and operate a grantmaking initiative that – from the beginning – is publicly identified with both partners. Governance arrangements can vary, with one partner typically taking on special responsibilities, but shared vision is key.
5. **Funders' Collaborative:** The most ambitious form of multi-funder partnership, where a number of foundations of varying sizes pool their dollars to tackle a topic of sufficient scale (and/or political sensitivity) and where "strength in numbers" is seen as an important asset. The group typically develops a governance structure and makes funding decisions jointly.

Adapted from a 1997 conversation between Ruth Riedel, Ph. D., Alliance Healthcare Foundation, and Thomas G. David, formerly of the California Wellness Foundation.

People ...

MARIANO DIAZ SELECTED AS THE SAN DIEGO FOUNDATION'S SENIOR VICE PRESIDENT OF COMMUNITY PARTNERSHIPS

Mariano Diaz has recently been selected to lead The San Diego Foundation's Community Partnerships Department as Senior Vice President. Mariano has extensive experience with nonprofit organizations, including serving as Director of The California Endowment's Community Health Investment Program and as Executive Director of California HealthCare Partnerships for Blue Cross of California. He was the owner and Principal Consultant of Esme & Associates, which provided capacity building strategies for nonprofit organizations and public agencies. His most recent position was as Global Director of the Nike Foundation, Global Community Affairs in Beaverton, Oregon, where he oversaw execution of US and global employee community involvement programs, Foundation grantmaking, corporate contributions and product donations totaling \$29 million annually.

In the News ...

FOUNDATION CENTER RELEASES NEW REPORT ON GRANTMAKING RESOURCES IN 2000 AND BEYOND

The Foundation Center has just released the 2002 edition of *Foundation Yearbook: Facts and Figures on Private and Community Foundations*, the premier source of information on the nation's more than 56,600 active private and community foundations. The report measures the size and scope of the U.S. foundation community in 2000 and examines growth patterns in foundation number and resources since 1975. It also provides detailed comparisons of foundations by foundation size, foundation type, and foundation region. In addition, the report includes estimates of foundation giving in 2001 and assessment of prospects for future growth in foundation giving.

SOME OF ITS KEY FINDINGS ARE:

- Western foundations continue to report fastest growth in number and resources
- Community foundations in the Midwest and West account for larger shares of giving than in other regions
- Family foundations represent roughly half of all independent foundation giving and assets
- Foundation giving expected to increase modestly in 2001 but remain flat in 2002

In the Resource Library ... NEW!

Information is key. As a funder, the more information you have, the more opportunities you have to invest in the community, and to invest well. Resources are available through the San Diego Grantmakers' newly-created library that can both teach you the latest in grantmaking practices, and supplement what you already know and do. San Diego Grantmakers maintains a library with information on virtually every area of grantmaking to help you do your work well. Our staff can assist you in finding sample guidelines, applications, proposal review forms, and examples of other grantmaking procedures. Our collection includes books, reports, articles, case studies, and some videos and cassette tapes.

Members are welcome to visit our office, browse and borrow materials, or to borrow by mail. All of our publications, videos, and tapes are complimentary, available for two-week use to our members.

OUR LIBRARY IS ALWAYS GROWING, SO BE SURE TO READ OUR NEWSLETTER TO STAY INFORMED OF NEW ADDITIONS.

The following is a small sample of what's in our library:

ON COLLABORATION:

The Collaboration Clinic ~ What is real collaboration? This packet contains the real dos and don'ts of collaborative leadership as presented during the clinic. Published by Community Development Consultants & Community Partners.

Family Matters Newsletter ~ This issue of *Family Matters* addresses the complexities of funder collaborations. It teaches about varying degrees of collaboration and aids in identifying the type of collaborative to best suit your foundation. Published by The Council on Foundation.

ON DIVERSITY:

Building on a Better Foundation, A toolkit for creating an inclusive grantmaking organization ~ The product of many years of dialogue, debate, and learning, this toolkit helps organizations practice inclusion by encouraging others to think about and pursue diversity in both their internal organization and their external work as grantmakers. Published by the Donors Forum of Chicago, the Minnesota Council on Foundations, Northern California Grantmakers, and the New York Regional Association of Grantmakers.

ON CAPACITY BUILDING:

Reflections on Capacity Building ~ Part of a series produced to share lessons learned and information gleaned from funding five initiatives which included components intended to build the capacity of the initiative grantees. Published by The California Wellness Foundation.

ON BOARDS:

Ten Basic Responsibilities of Nonprofit Boards ~ The first step to effective board service is to reduce the many ambiguities that inevitably accompany it. The purpose of this booklet is to clarify and distinguish the responsibility of the board as a collective entity and those of individual board members. Published by BoardSource.

ON SALARY:

Grantmakers Salary and Benefits Report 2001 ~ The report is based on responses from 728 foundations and giving programs, intended to help foundation administrators and boards evaluate their policies and practices by comparing them to those of a larger group of grantmakers. Published by the Council on Foundations.

ON FOUNDATION MANAGEMENT:

Small Foundation Management From Groundwork to Grantmaking ~ Whether you are looking for the basics or are a seasoned grantmaker looking to improve upon your work, in these pages you will discover operating tips to structure and run your small foundation – from the ground up. Published by the Council on Foundations.

ON GIVING:

Venture Philanthropy 2002, Advancing Nonprofit Performance Through High-Engagement Grantmaking ~ This report identifies useful experience, helps nonprofit leaders understand how they can approach and succeed in high-engagement partnerships, and shares knowledge with the broader philanthropic community through the voices of those who are leading the way. Published by Community Wealth Ventures, Inc.

Creating a Giving Program, A Guide for Small and Mid-Sized Companies ~ This booklet will help you choose the options that are right for your business, whether it be direct cash gifts, loans of employee talent to nonprofit organizations, or a company-sponsored foundation, and help you through the basic steps of creating, organizing, and improving your giving program. Published by the Forum of Regional Associations of Grantmakers.

Connecting . . . ONLINE RESOURCES

www.handsnet.org

An online community that is part of HandsNet, a national, nonprofit organization that promotes information sharing, cross-sector collaboration and advocacy among individuals and organizations working on a broad range of public interest issues. For more than a decade, HandsNet has worked to make online collaboration and information sharing a reality for the human services community. HandsNet empowers organizations to effectively integrate new online strategies, strengthening their program and policy work on behalf of people in need.

www.lapiana.org

Real Collaboration is available for free download at www.lapiana.org and includes tips on assessing nonprofit collaborations. LaPiana.org is the home of Strategic Solutions – a collaborative effort of The David and Lucile Packard Foundation, The James Irvine Foundation, The William and Flora Hewlett Foundation, and LaPiana Associates, a management consulting firm specializing in the issues faced by nonprofit organizations in today's challenging and ever-changing world.



Guest Remarks . . . CONTINUED FROM PAGE 3

Ingredients for Success – The particulars of any successful collaboration will differ, but there seem to be some prerequisites. The most fundamental of these is trust, built upon mutual respect and honest communication. A successful collaboration also requires shared vision, goals, and a commitment to make it work. While the structure and governance of the collaborative must be clearly defined, the partners must also be open to new relationships and ideas. In both good times and bad, it is essential to have open lines of communication and a clear process to resolve conflicts in order to keep the collaboration alive.

Additionally, collaborators must share risks, responsibilities, rewards, and resources – financial or otherwise. There must be clear expectations and clear outcomes specified for the collaborative. All parties put substance before ego. And, perhaps above all, patience is clearly a virtue.

Pitfalls – What are the biggest stumbling blocks to successful collaboration? Turf seems to be at the top of everybody's list, followed by concerns over who is going to get the credit if the effort is successful.

Cultural tensions, conflicts of interest, and lack of understanding of the differences in the way each partner's organization functions can cause a collaboration to break down. Lack of leadership impedes progress, causes confusion and frustration, and leaves the group rudderless in the stormy seas that it may be facing.

Collaboration also consumes considerable time, energy, and resources. If foundations do not reward the effort required to build effective relationships, the staff will end up putting their energies elsewhere. An unrealistic time frame for success can also be a recipe for disappointment and failure. And, when key players depart, the resilience and the commitment of the rest of the group will be tested.

Lastly, collaboration is more invention than theory. It can be messy, with considerable ambiguity. Grantmakers come to philanthropy with different backgrounds, experiences, and personalities, and some just may not feel comfortable in that context.

Excerpted with permission from remarks made by Lauren LeRoy, Ph.D., President and CEO of Grantmakers in Health, at the 2002 GIH Annual Meeting.

Family Ties . . .

ADDRESSING DONOR LEGACY

Every family foundation must deal with donor legacy at some point. More often than not, donors do not leave a clear articulation of philanthropic philosophy. Each generation of trustees, therefore, needs to find the balance between honoring a founder's wishes and changing with the times. Following is a list of questions that help foundation trustees to clarify their foundation's legacy.

LEARNING YOUR LEGACY

History and Tradition

1. What is the history and tradition of your foundation? Does your foundation have a mission statement? Does it need one?
2. Were there overt directions to the family from the donor regarding future philanthropic interests?
3. If there were no specific directions, would an examination of your founder's life reveal any special interests or guiding values?

Current Practice

1. If there were specific directions to the foundation, do you have a process for reviewing and amending them to reflect changing needs and times?
2. Is there a common value system that characterizes your family? Is it evident in the way the family handles the foundation's philanthropy today?
3. If there were no specific directions from the donor of your foundation, do you have a process for setting goals for your philanthropy and reviewing or modifying them regularly? Do the goals relate to both program management, including investments?

Future Impact

1. What does the donor mean to your family foundation, either as a symbol, or in legal direction spelled out in the instrument of gift or the bylaws of the foundation?
2. How will the next generation view the donor's legacy to your foundation? What is your responsibility to interpret the donor's intent for generation that follow you?

MAKING WISHES KNOWN

The following questions may help prospective donors to new or existing family foundations clarify their wishes concerning future disposition of their funds.

1. Have you reflected on why you wish to establish family philanthropy, what is the mission and purpose of this philanthropy and what is the meaning for your family?
2. Have you ensured that your values and core beliefs are reflected in the legal, written document establishing the foundation? Have you expressed your values in other documents that might help your family govern the foundation according to your wishes?
3. Have you incorporated flexibility into the foundation you are endowing? Have you taken into account the changing needs of society and encouraged your descendants to respond to them?

This article was adapted from Foundation News and Commentary.



**San Diego Neighborhood Funders
The Diamond Initiative
SUPPORTING RESIDENTS ...
BUILDING STRONG COMMUNITIES**



SDNF: An alliance of grantmakers and resource partners that support residents changing their own neighborhoods. By working and learning together, we believe we can deepen our understanding and broaden our impact as grantmakers in neighborhood change.

Beginning with the Diamond, our long-term mission is to assure that all of San Diego's neighborhood's are healthy and vibrant neighborhoods.

AS FUNDERS WE SEEK TO:

- Increase our capacity to collaborate to work comprehensively across our traditional areas of interest.
- Create an effective process for local, regional, and national funders to work together and with the communities we serve.
- Develop tools and techniques to guide resident-advised grantmaking at the neighborhood level.
- Enhance our ability to coordinate with other forms of capital beyond grants that create change.
- Share knowledge of the community building experience with other funders.



WITHIN THE DIAMOND WE SEEK TO:

- Participate in the comprehensive revitalization of the Diamond.
- Support projects that increase civic engagement, promote social and economic development, and improve the physical environment of the neighborhoods.
- Create opportunities to enhance resident skills in planning, project management, research, and developing resources.
- Support activities that promote the Diamond becoming a great place to live, work, and play.

PARTNERS

- ANNIE E. CASEY FOUNDATION
- BANK OF AMERICA
- LEGLER BENBOUGH FOUNDATION
- JACOBS CENTER FOR NONPROFIT INNOVATION
- MCCRAW FAMILY FUND
- THE PARKER FOUNDATION
- SAN DIEGO FOUNDATION FOR CHANGE
- SAN DIEGO GRANTMAKERS
- SAN DIEGO NATIONAL BANK
- UNITED WAY OF SAN DIEGO COUNTY
- THE WEINGART-PRICE FUND



For more information contact:
San Diego Grantmakers
Julie Holdaway 619/744-2180
julie@SDGrantmakers.org
San Diego Neighborhood Funders
Nina Smart 619/527-6161
ninaws@aol.com

San Diego Forum on Collaboration

In San Diego, on May 23, 2002 150 people gathered to discuss collaboration. Hosted by Eureka San Diego and Sempra Energy, the discussion was guided by David LaPiana. The range of sectors represented was wide – nonprofits, government, business, and foundations. The purpose of the forum was to improve collaborations between nonprofit agencies, government agencies, foundations, and corporations in San Diego.

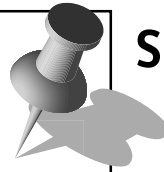
What does it mean to collaborate? What are the critical ingredients in collaborations? Participants developed the *Ten (+) Commandments of Collaboration* that can guide collaborative efforts in the San Diego area.

Ten (+) Commandments of Collaboration

1. **THE COLLABORATIVE SHOULD BE MISSION-DRIVEN**
 - Shared Values, Vision, and Mission
 - Commitment
 - Common Goals
 - Common Culture
2. **RELATIONSHIP BUILDING IS IMPORTANT FOR COLLABORATION TO SUCCEED**
 - Foundation of Mutual Trust and Respect – Egos are left at the door
 - Relationship Roles
 - Individual Responsibilities
 - Infrastructure Funding
3. **THERE MUST BE REAL RESULTS FOR COLLABORATION TO SUCCEED**
 - Action to Deliver Better Results
 - Focus on the Net Results
 - Providing Better Services
 - More Efficacy
4. **DIVERSE COMMUNITY INVOLVEMENT IS CRITICAL TO COLLABORATION'S SUCCESS**
 - A Variety of Passionate Stakeholders
 - Inclusion (Stakeholders, Ideas, etc.)
5. **A COLLABORATION MUST DEAL WITH REAL NEEDS**
 - Identifying and Responding to Authentic Community Needs
 - Feeling Need and Vision Can't Be Done Alone
6. **EQUITABLY LEVERAGING RESOURCES AND "GLUE MONEY" ARE IMPORTANT TO A COLLABORATION'S SUCCESS**
7. **A COLLABORATION NEEDS A CLEAR PURPOSE**
 - Commitment
 - Clarity on Vision, Purpose, Responsibilities, and Goals
8. **THE PROCESS MUST BE OPEN, HONEST, EQUITABLE, AND ONE THAT THE PARTICIPANTS CAN WORK WITH**
 - Structure of Collaborative Governance
 - Shared Leadership
9. **A COLLABORATION MUST INCLUDE TIME AND RESOURCES FOR REFLECTION AND TRANSFORMATION**
10. **TO SUCCEED, COLLABORATION MUST HAVE BUY-IN FROM STAFF OF PARTICIPATING AGENCIES**
11. **COLLABORATIVE MUST HAVE FLEXIBILITY**
 - Willing to Be Open Minded and Creative
 - Having a Strong and Flexible M.O.U.
12. **THE DECISION MAKERS MUST BE INVOLVED FOR A COLLABORATION TO SUCCEED**
 - Change Agents at the Door

This meeting brought together representatives from varying sectors with differing perspectives. However, clear agreement was reached on the top three elements of successful collaboration: being mission driven, built on solid relationships, and aimed at real results. The results of this meeting provide a starting place for a dialogue on what it really means to collaborate successfully.

Calendar of Events ...



SEPTEMBER 10 ...

HOW FAMILY FOUNDATIONS THRIVE ACROSS GENERATIONS

9:30 – 11:30am

San Diego State University
City Heights Community Center
4583 El Cajon Boulevard, Suite 240
San Diego

Lisa Fredericks Parker, President,
Lawrence Welk Family Foundation

Laura Galinson, Executive Vice
President, Galinson Family Foundation

Foundations' trustees are charged with creating and maintaining a successful enterprise that includes the family and ensures appropriate governance and effective grant-making. 34% of the family foundations in a COF survey have formally defined what constitutes *family* for the purpose of appointing family members to the board. An overwhelming majority of respondents indicated that direct descendants of the donor are considered family. However, a number of respondents, 82 of 218, also noted that spouses of descendants are eligible to represent family by board service. Please join us for a discussion of how family foundations can survive and thrive from one generation to the next.

SEPTEMBER 18 ...

HOMELESS IN SAN DIEGO A FUNDER'S ROUNDTABLE: THE CHALLENGES AND OPPORTUNITIES

11:30am – 1:30pm

Children's Museum/Museo de los Niños,
200 West Island Avenue
San Diego

One of the most important benefits of belonging to SDGrantmakers is the chance to network, share learnings, and discuss funding strategies with colleagues in this region. We invite you to join us for a roundtable discussion on this critical San Diego issue: homelessness.

SEPTEMBER 24 ...

CORPORATE TRACK CAUSE-RELATED MARKETING: SUBSTANCE BEHIND THE HYPE

11:30am – 1:30pm

AMCC
6310 Sequence Drive
San Diego, CA 92121

Marketing your company and investing in the community, do not have to be mutually exclusive.

Cause-related marketing can be a strategic tool to build community partnerships that work.

- What is the current research on cause-related marketing and corporate community investment?
- Who are the stakeholders?
- How are San Diego companies conducting cause-related marketing campaigns?
- What are the limitations?
- Where do you start?

Invite your community relations, marketing, and communications colleagues to discuss how marketing dollars can be put to work in the community.

OCTOBER 22 ...

21ST CENTURY PHILANTHROPY: RE-THINKING OUR ASSUMPTIONS

8:30am – 4:00pm

Keynote Luncheon:

Gloria Penner, KPBS, moderator

David Brancaccio, *Marketplace*, MPR
and *California Connected*, KPBS

James Canales, VP
James Irvine Foundation

Reserve your seat today!

San Diego Grantmakers

4270 Executive Square, Suite 200

La Jolla CA 92037 •

phone 619/744-2180 • fax 619/744-2182

www.SDGrantmakers.org

programs@SDGrantmakers.org

SDGRANTMAKERS GROWS STRONG WITH MEMBER INVOLVEMENT

SDGrantmakers' work is informed and inspired by a cadre of members who contribute time, talent, and ideas to the creation of our programs and workshops, newsletters, and website. We invite you to participate in the future direction of this membership association and to work with your colleagues to strengthen philanthropy in San Diego.

Engage in our efforts and volunteer for a committee, contact Sharla Meeks, Member Services Coordinator, 619/744-2180 or Sharla@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.
- **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.



Homeless in San Diego – A Funders' Roundtable: the Challenges and Opportunities

M E M O R A N D U M

TO: SDGrantmakers Members
FROM: Mary Herron, Parker Foundation
Julie Holdaway, San Diego Grantmakers
SUBJ: **A series of two funder conversations to discuss responses to homelessness in San Diego and opportunities for a funder collaborative**

There are more than 15,000 homeless people in San Diego County.

- A FIFTH OF SAN DIEGO'S HOMELESS POPULATION HAS BEEN HOMELESS FOR MORE THAN 4 YEARS. MORE THAN HALF ARE WHITE; 70% ARE MALE – THEIR AVERAGE AGE IS 30.

*As grantmakers, how are we responding?
What are the challenges and barriers?
What are the possibilities?*

- ABOUT 1,900 OF OUR HOMELESS NEIGHBORS ARE SEVERELY MENTALLY ILL.
- 30-40% OF HOMELESS ADULTS ACTIVELY ABUSE ALCOHOL AND/OR DRUGS.
- ABOUT 800 ARE CHRONICALLY HOMELESS YOUTH, WITH AN ADDITIONAL 1,500 TO 2,000 TEENAGE RUNAWAYS – MOST FROM LOCAL HOMES.

One of the most important benefits of belonging to SDGrantmakers is the chance to network, share learnings, and discuss funding strategies with colleagues in this region. We invite you to join us for a roundtable discussion on this critical San Diego issue: homelessness. There will not be experts presenting data, programs, and stories. Rather this is an opportunity to speak funder to funder. What are the challenges and what are the opportunities? Is there an opportunity to develop a collaboration to combat this seemingly ubiquitous problem?

Homeless in San Diego A Funders' Roundtable: the Challenges and Opportunities

September 18, 11:30am - 1:30pm, lunch is provided
Children's Museum/Museo de los Niños
200 West Island Avenue, San Diego
RSVP to 619/744-2180
or programs@SDGrantmakers.org

SAVE THE DATE ...

SDGrantmakers will host a second meeting in November to further discuss a potential collaborative and to develop the next steps. Join us at The Welcome Door Foundation, and experience lunch at the shelter.

November 6, 11:30am - 1:30pm
Pacific Beach United Methodist Church
and The Welcome Door Foundation
RSVP 619/744-2180 or
programs@SDGrantmakers.org

Yes! Sign me up for:

**SEPTEMBER 18 ... HOMELESS IN
SAN DIEGO A FUNDERS' ROUNDTABLE:
THE CHALLENGES AND OPPORTUNITIES**

**NOVEMBER 6 ...
WELCOME NEXT DOOR
FOUNDATION LUNCH MEETING**

NAME: _____

ORGANIZATION: _____

PHONE: _____ EMAIL: _____

RSVP to:
programs@SDGrantmakers.org
www.SDGrantmakers.org

San Diego Grantmakers • 4270 Executive
Square, Ste. 200 • La Jolla CA 92037
phone 619/744-2180 • fax 619/744-2182



SEPTEMBER 10 ...

HOW FAMILY FOUNDATIONS THRIVE ACROSS GENERATIONS

9:30 – 11:30am

San Diego State University
City Heights Community Center
4583 El Cajon Boulevard, Ste. 240, San Diego

Lisa Fredericks Parker, President,
Lawrence Welk Family Foundation

Laura Galinson, Executive Vice
President, Galinson Family Foundation

Foundations' trustees are charged with creating and maintaining a successful enterprise that includes the family and ensures appropriate governance and effective grant-making. 34% of the family foundations in a COF survey have formally defined what constitutes *family* for the purpose of appointing family members to the board. An overwhelming majority of respondents indicated that direct descendants of the donor are considered family. However, a number of respondents, 82 of 218, also noted that spouses of descendants are eligible to represent family by board service. Please join us for a discussion of how family foundations can survive and thrive from one generation to the next.

SEPTEMBER 18 ...

HOMELESS IN SAN DIEGO, A FUNDER'S ROUNDTABLE: THE CHALLENGES AND OPPORTUNITIES

11:30am – 1:30pm

Children's Museum/Museo de los Niños
200 West Island Avenue, San Diego

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YES! Sign me up for:

- | | |
|--|---|
| <input type="checkbox"/> SEPTEMBER 10 ... HOW FAMILY FOUNDATIONS THRIVE ACROSS GENERATIONS | <input type="checkbox"/> SEPTEMBER 24 ... CORPORATE TRACK – CAUSE-RELATED MARKETING: SUBSTANCE BEHIND THE HYPE |
| <input type="checkbox"/> SEPTEMBER 18 ... HOMELESS IN SAN DIEGO – A FUNDER'S ROUNDTABLE: THE CHALLENGES AND OPPORTUNITIES | <input type="checkbox"/> OCTOBER 22 ... 21ST CENTURY PHILANTHROPY: RE-THINKING OUR ASSUMPTIONS |

NAME: _____

ORGANIZATION: _____

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