

# The Foundation Insider

## The San Diego Foundation's Role in this Economic Climate

The San Diego Foundation takes seriously its role as a community leader in San Diego. We believe it is imperative that we analyze the current situation and its impact on our communities and organizations, and play an appropriate role in keeping our community sustained and thriving into the future. Staff is currently convening groups of stakeholders to gain feedback on the issue, as well as gathering data from nonprofit organizations to gauge its impact on them. Additionally, The Foundation's Organizational Success Program is putting together a task force to develop a plan of action with staff, so that we will be ready to move forward with any targeted initiatives. Thus far, we have established the nonprofit *Survive and Thrive Fund*, a fund that will go toward helping nonprofits manage this time through a variety of workshops and consultation services. If you would like to provide any input or if you would like to contribute to the fund, please contact Deirdre Maloney at [deirdre@sdfoundation.org](mailto:deirdre@sdfoundation.org)

Also on the economy, The San Diego Foundation was recently featured twice in the *San Diego Business Journal*, both stories relating to the economy and its implications in San Diego. To read the story on the impact of the economy on nonprofits, [click here](#). For a story where local experts weigh in on the economic climate, [click here](#).

## STRATEGIC PLAN UPDATE



The Strategic Planning Committee continues to meet regularly. The committee has decided to engage Paul Harder of *Harder and Company Community Research* to assist us with the strategic planning process. Paul worked with us during the development of our last strategic plan in 1998. The committee decided to take the following steps moving forward:

1. Host a series of "Community Leader Luncheons".
2. Send out a survey to a large number of Foundation constituents, including Board Members, donors, prospective donors, community leaders, etc. We will ask a series

The Foundation, and what role they expect us to play into the future.

3. Collect data on the results and impact of grantmaking at The Foundation.
4. Analyze and review all strategic data.

The next meeting of the Strategic Planning Committee is scheduled for mid-November.

## Helping Donors Make Beneficial Year-End Contributions

As we prepare for the end of another tax year, charitable giving is in its busiest season. Our Charitable Giving team is spending much of their time reaching out to prospective donors to assist them in making contributions to benefit the community. Some of these individuals are also exploring how to give while generating income for themselves and/or their loved ones. Foundation staff and board leadership are also hosting individual meetings, professional advisor roundtables, and convenings to discuss the economic impact on San Diego. For more information on year-end giving, contact Adrienne Vargas at [adrienne@sdfoundation.org](mailto:adrienne@sdfoundation.org)

## Investments

With the current economic challenges, The Foundation's portfolio has experienced some market declines. The good news is these declines have been less severe than the domestic and international equities markets. This is due to The Foundation's highly diversified investments in a variety of asset classes. Members of The Foundation's Investment Committee, Foundation staff and our investment consultants are actively communicating with investment managers during these turbulent economic times.

## Programmatic Updates

**Civil Society:** Foundation Board Chair Jack Raymond, President and CEO Bob Kelly, and Civil Society Director Cheryl Alethia Phelps, recently met with the Honorable Karen Bass (D-, Speaker of the California State Assembly)... [more](#)

**Community Scholarship Program:** The 2009-2010 scholarship season is set to launch later this month, during the week of November 24, 2008. Last year, a record-breaking \$3.1 million in scholarships was awarded to over 600 students... [more](#)

**Environment:** Over the past year, The Foundation has brought 40 researchers together to examine the potential impacts of climate change in the San Diego region, projecting out to the year 2050... [more](#)

## Latest Happenings:

**[Adrian Gonzalez Speaks at Professional Advisor Luncheon](#)**



Jack Raymond, Foundation's Board Chair, Betsy Gonzalez, Adrian Gonzalez, Bob Kelly, Foundation's President & CEO.

The Foundation held its Professional Advisor Appreciation luncheon earlier this week at the Diamond View penthouse. This was our opportunity to appreciate and celebrate the professional advisors – attorneys, financial planners, accountants, investment advisors – who partner with us to increase charitable giving in our region. San Diego Padres first baseman Adrian Gonzalez and his wife Betsy Gonzalez shared their experience of establishing the Adrian and Betsy Gonzalez Foundation, and their vision to empower underprivileged youth through athletics, education and health.

Nancy Spector received special recognition for her tireless efforts in promoting charitable conversations tailored to every client's passion. Bill Geppert and Cox Communications hosted this exclusive event.

### **\$80,000 in Grants Announced at Escondido Celebration**

The Escondido Charitable Foundation held its 2nd Annual Grant Awards Celebration on October 30th, 2008 at Orfila Vineyard & Winery in Escondido. An affiliate of The San Diego Foundation, The Escondido Charitable Foundation was pleased to award \$80,000 in grants to three Escondido programs focusing on **"Healthy Lifestyle Choices."** The Foundation's mission is to improve the quality of life within the Escondido community by promoting and increasing responsible and effective philanthropy.

The three organizations selected as grantees this year are:

- Interfaith Community Services  
**"Escondido Community Sobering Services Program"**
- City of Escondido Older Adult Services  
**"Escondido Joslyn Senior Center"**
- Escondido Community Child Development Ctr.  
**"Infant-Toddler and Preschool Counseling and Parent Education Program"**

For more information on the Escondido Charitable Foundation, visit [www.endowescondido.org](http://www.endowescondido.org)



Foundation Chair Jack Raymond, Escondido Charitable Foundation Immediate Past Chair Ken Lounsbury and members of grantee **Interfaith Community Services**

And finally... We hope you have received the first on-line version of *Foundation Focus*, our quarterly newsletter, newly released last week! For easy access you can get to it through our home page at [www.sdfoundation.org](http://www.sdfoundation.org). We look forward to your feedback.



Bob Kelly, President & CEO  
The San Diego Foundation



Jack Raymond, Board Chair  
The San Diego Foundation

If you have questions or would like to provide feedback on this email, please send them to [deirdre@sdfoundation.org](mailto:deirdre@sdfoundation.org)

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The San Diego Foundation | [www.sdfoundation.org](http://www.sdfoundation.org) | [info@sdfoundation.org](mailto:info@sdfoundation.org) | (619) 235-2300  
2508 Historic Decatur Rd., Ste.200 San Diego, CA 92106

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