

SDWF FORWARD!



The San Diego Women's Foundation educates and inspires women to engage in collective philanthropy. We are catalysts for change, investing in innovative solutions that benefit underserved communities in the San Diego region.

Strategies To Amplify Our Impact

In 2000, a small group of women envisioned an organization that would promote the participation and leadership of women in philanthropy. Like women in other major U.S. cities, these San Diegans sought new opportunities to make a difference in their community on issues important to the entire region. These forward thinking women understood the potential power of collective philanthropy. Now 15 years later, our organization continues to attract dynamic women leaders dedicated to making a difference in their community.

The San Diego Women's Foundation (SDWF) is committed to educating, inspiring, and leading women to engage in collective philanthropy. We are catalysts for change, investing in innovative solutions that benefit underserved communities in the San Diego Region. SDWF has accomplished so much more than we could have imagined at the start of this great venture. Together, we have demonstrated a long term commitment to community impact through our grants and to member impact through our robust member and education programs.

To date we are proud to have:

Developed a unique and rich membership experience that is the essence of SDWF

Invested nearly \$3 million through 75 member-driven grants in our community

Engaged more than 550 current and alumnae members – each one a savvy philanthropist in her own right

Grown a \$3.1 million endowment – continuing on our path to securing our future

Established meaningful relationships with our Community Partners

Become a model for other collective giving groups locally and nationally



Leadership, learning and innovation are in our DNA. We continually pursue ways to advance collective giving in order to make permanent and lasting change. Now, let's keep leading the way. Over the last two years, our Board has engaged in a strategic planning process assessing how we can increase our 'philanthropic footprint'. We listened to members and looked at the trends in philanthropy. Outcomes of that work, which we believe will broaden and deepen our member and community impact, include:

A continued commitment to our core purposes – education and collective philanthropy are and always will be priorities for our organization:

- ✓ Building Savvy Philanthropists (Member Engagement and Education)
- ✓ Member-Driven Grantmaking (Flagship Grants Program)

Embracing three new initiatives to help us amplify our impact:

- ✓ Organizations Can Do More Than Organization (Collaboration)
- ✓ Going Beyond the Grant (Connecting with Community Partners)
- ✓ Championing Leaders (Philanthropy Fellows Program)

Ensuring sustainability by continuing to follow strong governance practices emphasizing financial security, transparency and accountability:

- ✓ Sustainability: Securing Our Future

Get involved! If you have the desire and capacity – time, talent, and/or treasure – we need your help. There are so many opportunities to get involved with SDWF. Find what strikes you and join us to make San Diego a better place to live!

Developing Savvy Philanthropists



Member Engagement & Education

A cornerstone of SDWF's mission is to educate and inspire women to engage in collective philanthropy. What makes SDWF unique and robust is the substantial member involvement. This rich membership experience has become the essence of SDWF.

Building on the momentum of our learning culture, we will continue to offer programs that expand our members' philanthropic expertise.



We will continue to:

- ✓ **Grow our membership – *Each One Reach One***
- ✓ **Offer new educational programs and opportunities for members to gain an in-depth understanding of the philanthropic process and the needs of underserved communities in San Diego**
- ✓ **Diversify our membership making our organization even more dynamic**
- ✓ **Look for new ways to enhance our 'member experience'**

Member-Driven Grantmaking

Flagship Grants Program

In addition to providing educational programs, hands-on experience in grantmaking is the other cornerstone of SDWF.

Although we are known for our rigorous grants process, anyone who has attended our Annual Grants Celebration has felt the joy of making a difference and being a part of something bigger – truly the power of collective philanthropy. Women Can Do More Than Woman!™

We will continue to refine our process to remain on the leading edge of effective grantmaking.



We will continue to:

- ✓ Create positive change in San Diego's underserved communities
- ✓ Leverage our like-hearted members' time, talents and charitable dollars for the benefit of our region
- ✓ Be responsive and relevant to community needs
- ✓ Maintain our unique approach for building relationships with our Community Partners
- ✓ Grow our grants pool to invest more money into the region



Organizations Can Do More Than Organization

The Collaboration Initiative

This two-fold initiative would allow SDWF to collaborate with other organizations to make a greater impact in underserved communities. The two elements of the initiative are **Collaborative Learning** and **Collaborative Funding**.

- ✓ **Collaborative Learning** is an effort to join with other groups with similar values to learn about the issues and needs of the community and beyond.
- ✓ **Collaborative Funding presents opportunities to:**
 - ✧ Join initiatives supported by other funders to leverage our collective impact
 - ✧ Get a “seat at the table” with collaborative funders to amplify our philanthropic impact
 - ✧ Inspire funders to invest in our grants pool to enhance our community impact

Why is this initiative important?

Listening to our members and the trends in philanthropy, we believe that collaborative efforts are critical to making significant impact on core issues and to bring about positive change. We determined the next steps in growing SDWF’s learning and funding potential is collaboration.

What are the desired outcomes?

- ✓ **Deepen our learning beyond SDWF**
- ✓ **Broaden our funding to a larger community**
- ✓ **Move the needle toward a more vibrant region**

What resources are needed?

Resources needed include money to underwrite collaborative efforts. The Collaborative Funding pool will be completely separate from the Grants pool.



We will:

- ✓ **Collaborate to offer educational programs that will deepen our knowledge and broaden our reach**
- ✓ **Cultivate partnerships with other funders**
- ✓ **Raise \$25,000-\$50,000 for the initiative**
- ✓ **Choose a funding partner(s) and award a grant(s) as part of a collaborative funding project**

Going Beyond the Grant

The Connecting with Community Partners Initiative

This initiative provides an opportunity for our members to engage with our Community Partners beyond the grants process. Members' time and talent will be matched with the needs of organizations to deepen our members' investment in community change.

Why is this initiative important?

Members have expressed an interest in how they can become more involved in our Community Partners' work. Extending our connection with our Partners increases our impact in San Diego and provides opportunities for our members to engage more deeply. This aligns with our core mission to engage our members in strategic philanthropy.

What are the desired outcomes?

- ✓ Provide much needed resources in both time and talent to strengthen our Community Partners' effectiveness
- ✓ Increase options for member involvement

What resources are needed?

Resources needed include funds for building a system and staff support.



We will:

- ✓ Create the infrastructure needed for implementation
- ✓ Match members' time and talents with community needs



Championing Leaders

The Philanthropy Fellows Initiative

Over the years, several members have generously sponsored women to join SDWF. These women wanted to share their 'member experience' with others committed to making a difference but who did not have the financial resources to join. Seizing an opportunity presented by the San Diego Foundation (SDF), we were able to formalize these grassroots sponsorships and develop a Philanthropy Fellows pilot program.

In 2014, with funds provided by an SDF legacy endowment, we launched this pilot with three Fellows selected from our Community Partners. Fellows have a two-year term, are expected to fully participate in the grantmaking process and work on an individual project to support SDWF's mission. The goal of The Philanthropy Fellows Initiative is to formalize and grow this program beyond the pilot stage.

Why is this initiative important?

These Fellows participate in our robust grants process, share connections with members and other community partners and learn best practices in philanthropy and collective grantmaking. The knowledge and skills they gain help to strengthen their organizations and the communities they serve. Championing Leaders is a way for us to further leverage SDWF's impact in the region. In addition, these Fellows bring their unique perspectives and experiences to enrich and diversify our membership.

What are the desired outcomes?

- ✓ Grow this program to provide leadership opportunities that ultimately benefit the region
- ✓ Gain new perspectives from our Fellows to deepen our understanding of community needs
- ✓ Strengthen our organization by diversifying our membership
- ✓ Inspire Fellows to continue their membership after completion of the program

What resources are needed?

Resources needed include funds for additional fellowships and increased staff support.



We will:

- ✓ Complete program development
- ✓ Raise \$10,000 in year one to add three additional Fellows
- ✓ Expand the program to 10-15 Fellows by 2020

Sustainability: Securing Our Future

Fifteen years ago, SDWF started as a small group of committed women who wanted to learn about effective philanthropy, pool their money and invest it back to the community in a strategic way. Building on that foundation, we've matured into a highly respected organization. We have created a strong governance framework, recruited a dedicated, skilled board and added professional staff. SDWF will continue to maintain strong governance and financial diligence in managing our organization with an emphasis on financial security, transparency, and accountability.

Our primary funding sources for our grant and member programs continue to be: member contributions, endowment earnings, San Diego Foundation support, member and alumnae gifts, *Friends of SDWF* donations, *Legacy Circle* gifts and corporate partnerships.

An important component of our financial stability is our endowment which, after 15 years, has grown to more than \$3 million. Earnings from the endowment contribute to our overall program budget. Continued growth of our endowment is essential in providing a permanent funding source for SDWF's current programs and our new initiatives.



We will:

- ✓ **Ensure SDWF's financial health and sustainability**
- ✓ **Build our endowment so that every dollar of members' contributions gets invested into the community**
- ✓ **Expand our philanthropic partnership with the San Diego Foundation**
- ✓ **Raise additional revenue from members and other funders to support *SDWF Forward!***

Evaluating *SDWF Forward!*

SDWF's Membership and Grants Committees and the teams for our three new initiatives all have been tasked with creating detailed plans to achieve the desired outcomes. The Board will regularly communicate with the committees to set goals and to monitor and evaluate our progress.



THANK YOU!

We would like to thank our dedicated members for their commitment to SDWF; we wouldn't be here without them! Because of our highly engaged members and their community investment, we will continue to be a leader in women's collective philanthropy.

To our Community Partners, many thanks for being diligent stewards of our investment into the San Diego community. As a proud supporting organization of the San Diego Foundation, SDWF is grateful for the mutual benefits that result from this partnership.

We also appreciate the efforts of the Board Members for their work on this plan. In particular, we would like to recognize Joan Jones, who created the framework and provided the motivation and planning expertise that allowed the Board to develop **SDWF Forward!** A special thanks to Cindy Olmstead for her inspiring leadership and strategic planning facilitation.

Our Executive Director, Tracy Johnson, has been an invaluable addition to SDWF. Over the past 9 years, she's been the catalyst for the evolution of our organization. In addition to being the face of SDWF in the region, Tracy has elevated us to the national women's collective giving spotlight with her leadership and board service on the national philanthropic stage.



For more information, contact Tracy Johnson, Executive Director,
at tracy@sdfoundation.org or (619) 814-1374.



Celebrating 15 Years of
Collective Philanthropy

Proud Supporting Organization of the San Diego Foundation.

2508 Historic Decatur Rd., Ste. 200 • San Diego, CA 92106
SDWF@SDFoundation.org • SDWomensFoundation.org