



■ **Grantmaking Strategies**
Executive Summary



INTRODUCTION

The promise of Silicon Valley Community Foundation is to create positive social change to address the region's most pressing problems while inspiring greater civic participation in Santa Clara and San Mateo counties.

We are the community's crossroad, a place where donors with varied interests, nonprofits with innovative ideas, and government, religious and financial institutions come together.

In January 2007, the merger of Peninsula Community Foundation and Community Foundation Silicon Valley brought together the complementary strengths of two organizations, creating a new community foundation that would think regionally while still acting locally.

Since the merger, we have moved as quickly as possible to chart a course for the future. But we also have moved with deliberation and care to identify and more deeply understand the complex, inter-related challenges facing our region.

While developing our new strategies, we continued to make grants following the guidelines established by our parent organizations. Since January 2007, we have awarded \$12.3 million to nonprofit organizations in San Mateo and Santa Clara counties.

With our new grantmaking strategies, we will move forward to support, encourage and partner with nonprofit organizations and with public and private institutions advancing the most promising approaches in five selected areas. This will help us maximize the \$8 to \$10 million that we award annually from our endowment funds, which are separate from our donor advised funds. It is our hope that our new strategies will be of interest to other funding partners and that we will share lessons and replicate successful solutions throughout the region.

THE PROCESS THAT LED US TO THIS POINT

To arrive at our new grantmaking strategies, the community foundation began an extensive process that included researching best practices, identifying key issues facing the region, conducting research and hosting a series of community conversations to solicit ideas.

This Community Input Project provided the building blocks for our grantmaking strategies, drawing on national and regional experts for a series of nine strategic conversations. The nine topics were selected based on a review of local data, the many existing assessments of health, social and environmental concerns in the region and issues raised by community members. Hundreds of community and government leaders, academics, grantees, donors and funders participated in the conversations, offering ideas on both new and existing approaches. Those topics were: housing and basic needs, arts and culture, child and youth development, civic engagement, community economic development, education, environment, health and immigration.

For each conversation, we developed an issue brief based on verifiable data to promote common understanding and helped participants begin working together to identify solutions. To engage even more participants, we shared summaries of the Community Input Project sessions and conducted an online community survey in April 2008.

After carefully listening to others and analyzing data, we began making choices using key questions as our criteria: In which areas could the community foundation have the most impact? Were there identifiable and natural partners for us? Which areas offered the best opportunity for success? Did the issue build on the learning and experiences of our parent foundations? Even with these criteria, we were faced with a long list of promising ideas to consider. In the end, we narrowed our focus to five key areas. These five areas were unanimously approved by our board after extensive discussions as the new grantmaking strategies that will guide us as we embark on a new course.

THE FIVE STRATEGIES

1) IMMIGRANT INTEGRATION

The challenge: In our region, one-third of our residents are immigrants, nearly half of our workforce is foreign born and close to two-thirds of those under the age of 18 are children of immigrants. Given this demographic reality, a new social model of immigrant integration – one that promotes mutual benefits for immigrants and their receiving communities while allowing newcomers enhanced civic participation and improved economic mobility – is critical.

Grants will be awarded to:

- Bridge the cultural gap between immigrants and receiving communities through multi-faceted arts and civic engagement programs that promote understanding and break down misperceptions and prejudices.
- Expand and strengthen regional networks of legal services providers who help immigrants attain legal status, work toward citizenship and integrate into local communities.
- Increase access to adult English language classes, enabling immigrants to become language proficient and participate more fully in civic life.

2) ECONOMIC SECURITY

The challenge: In the past decade, an increasingly complex financial landscape has often led to consumer confusion and poor financial decision making. At the same time, reduced regulatory safeguards have allowed increased predatory lending practices in some areas. The ensuing housing crisis has affected the economic security of individuals, families and entire communities. To build a buffer against economic adversity and increase prosperity, people need financial education as well as opportunities to save, invest and preserve financial assets.

Grants will be awarded to:

- Increase availability of financial education and asset-building programs for adults and youths to help families achieve greater economic security.

- Promote policy advocacy that focuses on anti-predatory lending measures to promote state and local change and increase public awareness.

3) EDUCATION

The challenge: Our region is a global hub of technological innovation and discovery. However, a majority of our students are not adequately prepared to contribute to the workforce that is this region's economic engine. Addressing this challenge at the middle school level can help close the achievement gap in math that separates low-income students and students of color from others in preparing for college and future success.

Grants will be awarded to:

- Improve mathematics teaching and learning through targeted professional learning and development opportunities for teachers at middle school sites.
- Increase student access to quality, extended learning programs after school and during the summer that boost math achievement and engage students, families and communities in student success.

4) REGIONAL PLANNING

The challenge: Our region currently has more jobs than homes. This imbalance causes many workers to commute long distances in search of affordable housing, increasing traffic congestion and emissions and diluting the region's sense of community. As Silicon Valley continues to grow, preserving its economy and quality of life will require innovative land use and transportation policies, greater coordination and increased civic engagement.

Grants will be awarded to:

- Support local and regional planning efforts that promote affordable housing, transit-oriented development, access to green space and public participation.
- Advance public education and outreach about sustainable land use and transportation, resource conservation and local and regional planning efforts.

5) THE COMMUNITY OPPORTUNITY FUND

The Community Opportunity Fund will address essential safety-net needs, time-sensitive community issues and seed innovative ideas through a "Best New Idea" fund.

Grants will be awarded to:

- Support direct safety-net services, such as food and shelter.
- Seed innovative ideas that have the potential to spark widespread change.
- Fund issues and efforts important to the community and aligned with the community foundation's mission and values.

EXISTING INITIATIVES AND PARTNERSHIPS

While we are announcing new grantmaking strategies, we remain committed to and will continue initiatives and partnerships that our parent foundations helped develop into successful models. These initiatives and partnerships are funded separately by our government and corporate partners along with the community foundation and will continue to be an important part of our work. In addition, we will be working with funding partners to add new initiatives to the continuing initiatives listed below:

- Advancing the Arts, a three-year initiative started in 2005 that provides general support and technical assistance to small and mid-sized arts groups.
- Children's Health Initiative, which supports insurance for children in families with low incomes that are ineligible for Medi-Cal or Healthy Families.
- Community Schools Initiative, which helps transform public schools through high-quality instruction and a high level of parent and community participation.
- Environmental Solutions Forum II, a venture fund promoting environmental education experiences for middle and high school students from low-income communities.

- Fostering the Future, a venture fund designed to improve the system that serves kinship and foster care youth as they transition to adulthood.

- Peninsula Partnership Leadership Council, a group of multi-sector leaders working with local government to promote policies that support the healthy development of children, youth and families in San Mateo County.

- Raising a Reader, which promotes early literacy, healthy brain development and parent-child bonding.

- The School Readiness Initiative, a comprehensive effort to help parents prepare children for school, which includes Kickoff to Kindergarten, a summer program to help children without preschool successfully transition to kindergarten.

- Venture Van, which offers donors the chance to see first hand how model programs in local communities address important regional challenges.

THE PATH AHEAD

We are encouraged that the challenges we have identified in our region already have gained currency.

Gov. Arnold Schwarzenegger announced a "Bank on California" initiative in 2008 encouraging banks to offer affordable checking, savings and other services to lower income residents who are disconnected from the financial mainstream. Opportunity Fund, the San José-based community development financial institution, has been helping families build assets for years with a well-regarded approach that includes financial education, micro-loans, matched savings accounts and affordable housing financing.

In immigration, Collaborative Resources for Immigrant Services on the Peninsula, which is made up of six community-based organizations, has been providing direct services to immigrants in Peninsula communities, with a focus on legal services to children and their families.

Those efforts, along with others under way in education and regional planning, strengthen opportunities for partnerships and provide additional energy for donors, nonprofits, and government and community leaders to have an impact in the areas we will be targeting.

We fully understand that these new grantmaking strategies represent a significant change from the past. We also recognize that change can be disruptive and may present challenges to some nonprofit organizations. We hope that the 18 months during which we continued grantmaking under our parent guidelines provided the nonprofit community with adequate time to prepare for these changes.

No one institution can create significant change alone. Our endowment awards \$8 million to \$10 million a year. To extend our impact, we must partner with others to leverage our combined resources, networks and ideas. We must continue to connect donors with opportunities to create lasting change. And we must serve as a center for philanthropy, advocating new solutions to difficult problems.

Our region is built on a tradition of innovation. It is a tradition that is just as deeply embedded in our parent organizations as it is in Silicon Valley itself. Here, we embrace new products, new ways of doing business and new solutions. Silicon Valley is constantly

evolving. And the community foundation that serves this region must also evolve.

We look forward to charting our progress. As we do, we will learn and make adjustments along the way. We firmly believe that by focusing on these areas, Silicon Valley Community Foundation can be the catalyst we have promised to be for innovative solutions to this region's most challenging problems.

ABOUT SILICON VALLEY COMMUNITY FOUNDATION

The vision of Silicon Valley Community Foundation is to be a comprehensive center for philanthropy that inspires greater civic participation throughout San Mateo and Santa Clara counties.

The mission of Silicon Valley Community Foundation is to strengthen the common good, improve quality of life and address the most challenging problems. We do this through visionary community leadership, world-class donor services and effective grantmaking.

We value:

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|---------------|-----------------------|
| Collaboration | Integrity |
| Diversity | Public Accountability |
| Inclusiveness | Respect |
| Innovation | Responsiveness |

At a Glance

Silicon Valley Community Foundation is a catalyst and leader for innovative solutions to our region's most challenging problems. Serving all of San Mateo and Santa Clara counties, the community foundation has more than \$1.9 billion in assets under management and 1,500 philanthropic funds. The community foundation provides grants through donor advised and corporate funds in addition to its own Community Endowment Fund. In addition, the community foundation serves as a regional center for philanthropy, providing donors simple and effective ways to give locally and around the world. Silicon Valley Community Foundation launched in January 2007 following the landmark merger of Community Foundation Silicon Valley and Peninsula Community Foundation and is now one of the largest community foundations in the nation. Find out more at www.siliconvalleycf.org.

MORE INFORMATION

For a schedule of information sessions, supporting research papers, issue briefs and other information, go to www.siliconvalleycf.org

Requests for proposals will be issued beginning in September 2008 and continuing through 2009.

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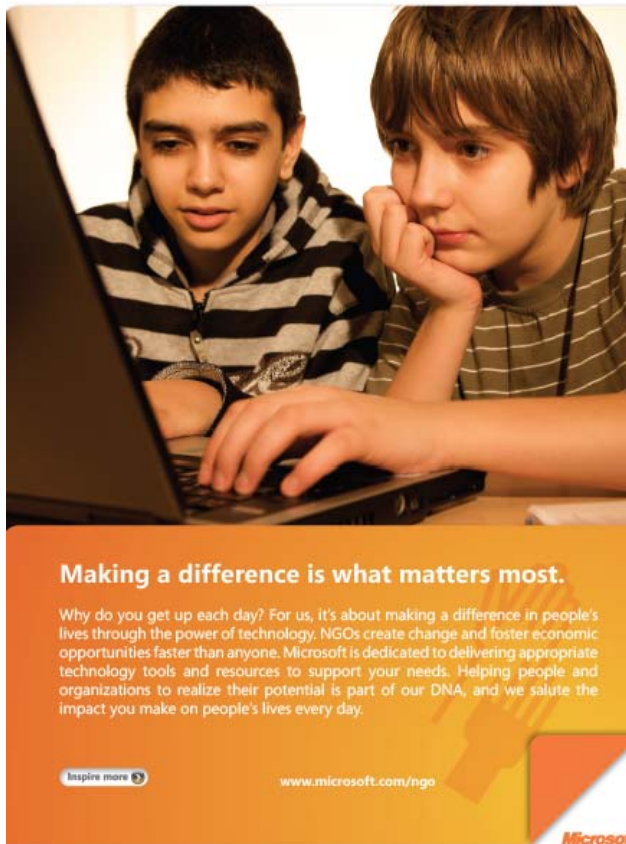
To read more about Silicon Valley Community Foundation
visit www.siliconvalleycf.org

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From Charitable Giving to Strategic Philanthropy



Session Description:

In this session you will participate in a dialogue with strategic philanthropic practitioners Ed Marcum and Erica Wood to learn about the role that high-engagement impact, venture philanthropy and leveraging partnerships can play in strategic philanthropy. Explore ways to take your giving to a new level — one that focuses on solving problems at their root. Hear how to identify opportunities to create change that is much greater than the size of your investment.

Speakers:

Ed Marcum,
Director of Investments Humanity United

Erica Wood
Vice President of Community Leadership,
Silicon Valley Community Foundation

Facilitator:

Patti Pace
Corporate Philanthropy Manager,
Business Services
Silicon Valley Community Foundation

Ed Marcum

As director of investments, Ed leads Humanity United's efforts to evaluate, execute and manage investment opportunities. Prior to joining Humanity United, Ed was the deputy executive director of World Links, where he oversaw programs focused on improving educational outcomes and economic opportunities for youth in developing countries through the use of information and communications technology. Before joining World Links, Ed served as executive director of Global Education Partnership, a nongovernmental organization that provides entrepreneurship and job skills training to low-income youth in Kenya, Tanzania, Guatemala and Indonesia. Ed holds a Bachelor of Arts degree in political science from the University of California at Berkeley, and an MBA/MA degree from The Wharton School/Lauder Institute at the University of Pennsylvania.

Erica Wood

As vice president of community leadership, Erica oversees Silicon Valley Community Foundation's strategic partnerships and initiatives, regional convening and research efforts. She and her colleagues actively engage investors in aggregating resources, capacities and connections to multiply the institution's reach and impact. Erica joined the community foundation in 2003 as the executive director of the Peninsula Partnership for Children, Youth and Families. In this role, she launched and managed award winning, multi-million dollar initiatives connecting cities, schools and communities to improve outcomes for vulnerable

2010 Corporate Citizenship Conference
PHILANTHROPY 3.0: The New Reality for Corporate Practitioners
March 5, 2010, Oracle Conference Center, Redwood Shores, CA



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children from birth to age eight. Prior to joining the community foundation, Erica was the director of research and evaluation at Applied Survey Research, a nonprofit social research firm in Santa Cruz County. While there she led the firm's community assessment and major evaluation projects throughout the greater Bay Area. Erica is a graduate of the University of California at Santa Cruz.

Patti Pace **Corporate Philanthropy Manager, Business Services**

As corporate philanthropy manager Patti contributes to the stewardship of Silicon Valley Community Foundation's corporate philanthropy and grantmaking practices. An accomplished leader with extensive experience in the corporate, government and nonprofit sectors, Patti works closely with the community foundation's corporate partners on the development and implementation of grantmaking and program initiatives.

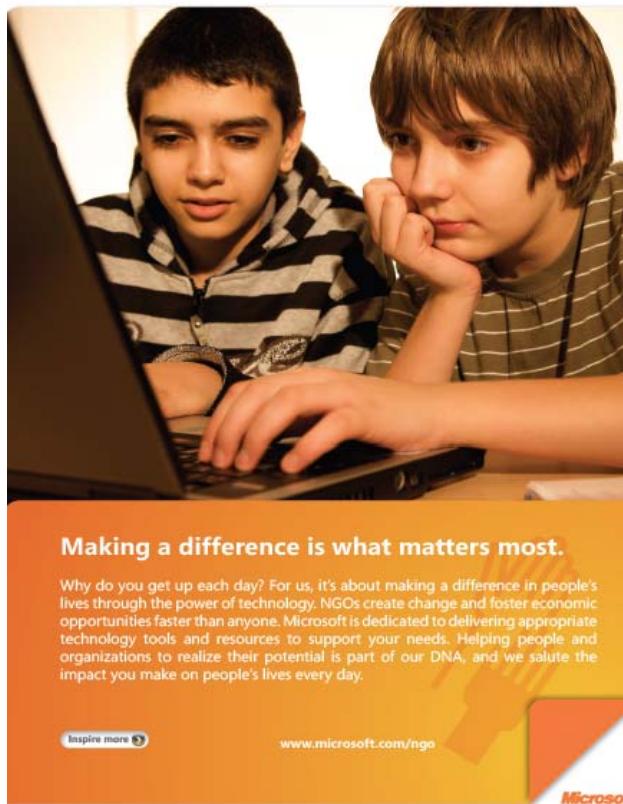
Patti joined Peninsula Community Foundation, one of Silicon Valley Community Foundation's parent entities, in December 2003 to direct the Peninsula Nonprofit Center providing technical assistance and research resources to the region's nonprofit and philanthropic communities. Her role expanded in 2006 as a program officer for the foundation's endowment grantmaking and as a contributor to initiatives and community outreach.

Prior to joining the community foundation, Patti lived and worked on the east coast in nonprofit and government management and moved to California in 2000 to join the marketing department of Serena Software in San Mateo. During her four years with Serena, Patti drove the strategy and creation of integrated marketing communications programs for the company's primary product line. While at Serena she managed national trade shows, conferences and other high profile customer events.

Patti holds a Bachelor of Fine Arts degree from Bradley University and an integrated marketing communications certificate from University of California, Berkeley extension program, business and management division.

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March 5, 2010, Oracle Conference Center, Redwood Shores, CA

From Charitable Giving to Strategic Philanthropy



Panelists:

Ed Marcum, Humanity United

Erica Wood,
Silicon Valley Community Foundation

Moderator:

Patti Pace

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The New Reality for Corporate Practitioners

March, 5, 2010

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