

# Grantmaking Fundamentals Workshop 2017

## AGENDA

8:00AM – 8:30 AM Coffee and Registration

8:30 AM – 9:30 AM

### **The Philanthropic Landscape**

Participants get to know one another and put their own foundation or giving program within the broader context of philanthropy.

#### Learning Results

- key facts and historic events in the development of philanthropy
- the infrastructure that supports philanthropy
- current trends and debates about philanthropy

9:30 AM – 10:30 AM

### **Developing Guidelines and Communicating Funding Priorities**

Participants reflect on their organizations' areas of interests and goals, as well as communicating with potential grantees and partners.

#### Learning Results

- establishing strong mission statements and grant guidelines
- a menu of communication templates and use of social media
- philanthropy's debate on transparency

10:45 AM – 12:15 PM

### **Funding Recommendations and Due Diligence**

Participants learn the art of grantmaking, balancing organizational values and goals, trustees' interests, and best practices in due diligence to better review and recommend grant proposals.

#### Learning Results

- typical steps and best practices in the proposal review process
- how to determine a proposal's relevance and fit to your foundation culture
- an introduction to nonprofit financial statements
- best practices in presenting recommendations to the board and communicating with grantseekers and grantees
- how to conduct a valuable site visit

Lunch

12:45 PM – 1:30 PM

### **ABAG Guiding Principles and Ethics**

Participants are introduced to key legal and ethical issues in grantmaking through scenarios and ABAG's Guiding Principles.

#### Learning Results

- the basic rules of expenditure responsibility
- definition and how to avoid self-dealing
- the role of conflicts of interest policies
- strategies for managing common ethical challenges

1:30 PM – 2:30 PM

### **Maximizing Grant Impact**

Participants connect capacity building, advocacy, grantee engagement, and diversity/inclusion to effectiveness and identify leadership roles in philanthropy beyond delivering dollars.

#### Learning Results

- key strategies to leveraging grant dollars
- considerations for working with government
- the importance of diversity and inclusion to effective grantmaking

2:45 PM – 3:45 PM

### **Managing Your Grant Portfolio**

Participants discuss grant monitoring, evaluation, and closure – including what to do when grantees flounder.

#### Learning Results

- an overview of the types and purpose of evaluation
- the design of grant reports
- effective practices in working with nonprofits to support their success

3:45 PM – 4:00 PM

### **Continuing to Learn**

Participants discover additional resources for professional development and develop a personal learning agenda.

#### Learning Results

- opportunities and resources, both national and local, for continuous learning
- strategies for staying attuned to your grant interest area
- strategies for fostering personal satisfaction from your work