



SOUTHERN CALIFORNIA
GRANTMAKERS

FUNDAMENTALS OF EFFECTIVE GRANTMAKING

SESSION 1

THURSDAY, OCTOBER 6, 2016

8:45 AM TO 4:30 PM

8:15 am – 8:45 am	CHECK-IN AND BREAKFAST
8:45 am – 9:00 am	WELCOME AND INTRODUCTIONS Chris Essel, President and CEO, Southern California Grantmakers
9:00 am – 9:30 am	NETWORKING ACTIVITY Kameron Green, Program Manager, Southern California Grantmakers
9:30 am – 9:45 am	Fundamentals Flashback....How Fundamentals helped influence my philanthropic career and how it can benefit you! Speaker: Juliet Flores, Program Officer, Annenberg Foundation
9:45 am – 12:00 noon	<u>DOING YOUR HOMEWORK: THE PROCESS OF ASSESSING PROPOSALS</u> During this session, you will trace the life of a proposal from the day it arrives in your office, through the process of evaluation, and on to final determination by the board. General administration tips as well as criteria for evaluating proposals will be discussed. Session Leaders: Wendy Garen, President and Chief Executive Officer, The Ralph M. Parsons Foundation Mary Odell, Philanthropic Leader
12:00 noon – 12:45 pm	BUFFET LUNCH
12:45 pm – 3:00 pm	<u>BUILDING STRONG RELATIONSHIPS WITH NONPROFIT PARTNERS</u> At the heart of effective grantmaking is the recognition that our grantees' work enables us to achieve our missions as funders. This session will explore how we can build stronger relationships with grantees in order to achieve our missions <i>and</i> strengthen the work and impact of our nonprofit partners. During the session, we will consider why relationships matter, the core values that drive strong relationships, and some key moments ripe for relationship-building. We will also have a chance to hear directly from nonprofit leaders about their experiences navigating the sometimes delicate terrain between funder and



SOUTHERN CALIFORNIA
GRANTMAKERS

FUNDAMENTALS OF EFFECTIVE GRANTMAKING

grantee.

Session Leaders:

Jennifer Price-Letscher, Senior Program Officer,
The Ralph M. Parsons Foundation

Belen Vargas, Vice President, Programs, Weingart Foundation

Panelists:

Tony Brown, Executive Director, Heart of Los Angeles (HOLA)

Johng Ho Song, Executive Director, Koreatown Youth and Community Center

3:00 pm – 3:15 pm

NETWORKING BREAK

3:15 pm – 4:30 pm

THE BALANCING ACT: MANAGING THE CHALLENGES OF GRANTMAKING

How do you remain grounded as a grantmaker and balance your personal and professional values? This session will provide participants with an opportunity to hear from seasoned grantmakers in the field about some of the professional challenges they have faced as well as the tools and strategies they have used to overcome them.

Moderator:

Kafi Blumenfield, Board of Directors, The James Irvine Foundation
Executive Director, Discovery Cube, Los Angeles

Panel:

Raúl Bustillos, Senior Vice President, Community Relations, Bank of America Foundation

Crystal Crawford, Program Director, The California Wellness Foundation

Roselma Samala, Philanthropic Leader, Asian-American Pacific Islanders in Philanthropy, (AAPIP-LA)

Matty Wilder, Senior Program Officer, The Herb Alpert Foundation

4:30 pm

WRAP-UP/ADJOURN



SOUTHERN CALIFORNIA
GRANTMAKERS

FUNDAMENTALS OF EFFECTIVE GRANTMAKING

SESSION 2

FRIDAY, OCTOBER 7, 2016

8:45 AM TO 4:00 PM

8:15 am – 8:45 am	CHECK-IN AND BREAKFAST
8:45 am – 9:15 am	<p>WELCOME Kameron Green, Program, Manager, Southern California Grantmakers</p> <p>NETWORKING ACTIVITY Dave Sheldon, Vice President of Programs and Strategic Initiatives, Southern California Grantmakers</p>
9:15 am-12:30 pm	<p><u>NUMBERS TELL A STORY: UNDERSTANDING FINANCIAL STATEMENTS</u> Do you find that reading financial statements causes your eyes to glaze over or your stomach to knot? This participatory workshop is designed to provide practical hands-on experience and resources to understand nonprofit financial materials from a programmatic perspective. Participants will discover what the rows and columns of numbers and other components reveal about an organization’s strengths, priorities, management, and challenges. We will discuss both audited financial statements and IRS 990 tax returns. In addition, there will be a small group activity.</p> <p>Session Leader: Adrienne Wittenberg, Executive Director, S. Mark Taper Foundation</p>
12:30 pm – 1:00 pm	LUNCH
1:00 pm – 2:15 pm	<p><u>FOUNDATIONS AS CATALYSTS IN THE CIVIC LANDSCAPE</u> This session will connect our work as grantmakers, relationship builders, and responsible brokers of social influence to the power, urgency, challenge, and opportunity that comes from working in the wider civic context.</p> <p>Session Leader: Paul Vandeventer, President and Chief Executive Officer, Community Partners</p>
2:15 pm-3:15 pm	<p><u>HOUSE OF CARDS? ADVOCACY AND PUBLIC POLICY</u> The Netflix series has painted a bleak image of advocacy and public policy with the shenanigans of the series’ powerful (and ruthless) characters. Reality, however, paints a vastly different picture. This session will cover the</p>



SOUTHERN CALIFORNIA
GRANTMAKERS

FUNDAMENTALS OF EFFECTIVE GRANTMAKING

fundamentals of advocacy and its critical function in advancing the goals of philanthropy in public policy through a discussion of the importance of public policy, communicating your policy preferences, and collaborating with government. Through an interactive session, learn the rules of engagement for effectively moving forward your foundations' agenda.

Session Leader:

Seyron Foo, Senior Manager, Public Policy & Government Relations

3:15 pm-3:30 pm

EXPANDING YOUR NETWORK: Opportunities to help you engage with other funders.

3:30 pm-4:00 pm

APPLIED LEARNING: PREPARING FOR YOUR VISIT WITH A GRANTMAKER

Kameron Green, Program Manager, Southern California Grantmakers

4:00 pm

ADJOURN



SOUTHERN CALIFORNIA
GRANTMAKERS

FUNDAMENTALS OF EFFECTIVE GRANTMAKING

SESSION 3

FRIDAY, OCTOBER 21, 2016

9:00 AM TO 3:30 PM

8:15 am – 8:45 am	CHECK-IN AND BREAKFAST
8:30 am – 8:45 am	WELCOME Kameron Green, Program Manager, Southern California Grantmakers
8:45 am – 10:15 am	<u>EVALUATION FOR LEARNING: HOW WE KNOW</u> Are your grants supporting the change you want to see? Are your grantees successfully monitoring and reporting on their funded projects? Are you using data to drive your internal decision-making and planning? This interactive session will help you become familiar with the fundamentals of practice-based assessment and evaluation. Participants will learn how evaluation can be used to support organizational learning and build effective relationships between funders and grantees. Session Leader: Kamella Tate, Principal, KTA/LLC
10:15 am – 10:30 am	NETWORKING BREAK
10:30 am – 12:30 pm	<u>DOING “THE RIGHT THING” - ETHICS IN GRANTMAKING</u> Truth versus loyalty, individual versus community... how do we decide between right and right? As grantmakers, we are often confronted with ethical dilemmas as we try to act responsibly toward our grantees, board of directors, peers, and the general public. In this session, grantmakers discuss how they would respond to hypothetical situations and share their personal experiences with ethical challenges. Session Leaders: Shane Goldsmith, President and Chief Executive Officer, Liberty Hill Foundation Connie Malloy, Portfolio Director, The James Irvine Foundation
12:30 pm – 1:00 pm	BUFFET LUNCH



SOUTHERN CALIFORNIA
GRANTMAKERS

FUNDAMENTALS OF EFFECTIVE GRANTMAKING

- 1:00 am – 1:15 pm VISIT WITH A GRANTMAKER DEBRIEF ACTIVITY
- 1:15 pm - 3:15 pm ADOPTING THE NETWORKING AND MENTORING LIFESTYLE
Is what you are doing now preparing you for what you will do next?
This interactive workshop will help you explore how the power of professional development and networking can propel a dynamic career in philanthropy. Learn innovative best practices and methods that de-mystify mentoring and networking and translate them into readily accessible skills.
- Session Leader:
John Kobara, Executive Vice President and Chief Operating Officer, California Community Foundation
- 3:15 pm – 3:30 pm CLOSING REMARKS/ADJOURN
Dave Sheldon, Vice President of Programs and Strategic Initiatives,
Southern California Grantmakers