



SOUTHERN CALIFORNIA
GRANTMAKERS

FUNDAMENTALS OF EFFECTIVE GRANTMAKING

SESSION 1

THURSDAY, OCTOBER 17, 2019

8:30 AM TO 5:00 PM

8:30 am – 9:00 am	CHECK-IN AND BREAKFAST
9:00 am – 9:03 am	GROUNDING IN
9:03 am – 9:15 am	WELCOME AND FRAMING Dave Sheldon, Vice President, Collaboration and Community Building, Southern California Grantmakers
9:15 am – 9:30 am	NETWORKING ACTIVITY Kameron Green, Director, Professional Learning & Communities, Southern California Grantmakers
9:30 am – 9:45 am	<u>FUNDAMENTALS FLASHBACK</u> How Fundamentals helped influence my philanthropic career and how it can benefit you. Speaker: Jonathan Reid, Program Officer, Grants & Programs, LA84 Foundation
9:45 am – 12:00 noon	<u>THE ART OF GRANTMAKING: MAKING CONNECTIONS AND ASSESSING PROPOSALS</u> During this session, we will provide an overview of philanthropy, the process of proposal review, and best practices for facilitating strong proposals. We'll examine the criteria for evaluating proposals through examples. Facilitators: Jennifer Vanore, Ph.D, President & COO, UniHealth Foundation Rosemary C. Veniegas, Ph.D., Senior Program Officer, Health, California Community Foundation
12:00 noon – 12:45 pm	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. We will



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consider why relationships matter, the core values that drive strong relationships, and some key moments ripe for relationship-building. We will also hear directly from nonprofit leaders about their experiences navigating the sometimes delicate terrain between funder and grantee.

Facilitators:

Jennifer Price-Letscher, Director, Programs & Special Projects,
The Ralph M. Parsons Foundation

Joanna Jackson, Vice President, Programs, Weingart Foundation

3:00 pm – 3:15 pm

NETWORKING BREAK

3:15 pm – 4:45 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:

Alicia Procello, President, Avery Dennison Foundation

Panel:

Rachel Roth, Executive Director, Crail-Johnson Foundation

Elana Wien, Vice President, Center for Designed Philanthropy,
The Jewish Community Foundation of Los Angeles

Julio Marcial, Director, Youth Justice, Liberty Hill Foundation

Dannielle Campos, Senior Vice President, Bank of America Charitable
Foundation

4:45 pm—5:00 pm

WRAP-UP/ADJOURN



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SESSION 2

FRIDAY, OCTOBER 18, 2019

8:20 AM TO 4:30 PM

8:20 am – 8:40 am	CHECK-IN/BREAKFAST
8:40 am – 8:45 am	WELCOME/GROUNDING IN <u>APPLIED LEARNING: PREPARING FOR YOUR VISIT WITH A GRANTMAKER</u> Kameron Green, Director, Professional Learning & Communities, Southern California Grantmakers
8:45 am-11:45 pm	<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. Facilitator: Adrienne Wittenberg, Executive Director, S. Mark Taper Foundation
11:45 pm – 12:15 pm	LUNCH
12:15 pm – 2:00 pm	<u>GRANTMAKING DUE DILIGENCE: THE THREE PILLARS OF HIGH-PERFORMING NONPROFIT BOARDS</u> Although governance is an art and not one-size-fits-all, a grantee’s board is critical to helping the organization deliver on its mission and goals. Assessing board quality and identifying potential red flags may require greater due diligence by grantmakers. Learn to recognize characteristics of high-performing nonprofit boards and the tools grantmakers can use to ensure their own mission is fulfilled. Facilitator: Sylia Obagi, President and founder, The Generative Group
2:00 pm – 2:15 pm	NETWORKING BREAK
2:15 pm—4:15 pm	<u>ADOPTING A COMPASSIONATE AND PHILANTHROPIC CAREER AND LIFESTYLE</u> 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



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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.

Facilitator: John Kobara, Executive Vice President and Chief Operating Officer, California Community Foundation

4:15 pm—4:30 pm

WRAP-UP/ADJOURN



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SESSION 3

WEDNESDAY, OCTOBER 30, 2019

8:30 AM TO 4:30 PM

8:30 am – 9:00 am	CHECK-IN AND BREAKFAST
9:00 am – 9:05 am	WELCOME/ GROUNDING IN
9:05 am – 9:20 am	<p><u>FUNDAMENTALS FLASHBACK</u> How Fundamentals helped influence my philanthropic career and how it can benefit you.</p> <p>Speaker: Jessica Monge Coria, Senior Program Manager, Corporation for Supportive Housing</p>
9:20 am – 11:30 am	<p><u>VEEP, HOUSE OF CARDS, OR THE WEST WING? ADVOCACY, PUBLIC POLICY, AND TRANSFORMATION IN THE CIVIC LANDSCAPE</u> Philanthropy operates within a complex, interconnected civic landscape—working alongside business, government, nonprofit institutions and academia. These other sectors can seem foreign to many of us, none more so than government entities, most of whom spend more money on any given issue than all of philanthropy combined. Public policy, politics, and advocacy have simultaneously earned a bleak image of public policy and advocacy, or a comedic cynical view of government. Reality, however, paints a vastly different picture. Through this interactive session, learn the rules of engagement for effectively moving your foundations’ agenda forward. We’ll explore the 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.</p> <p>We will also connect the work of philanthropy within the larger civic landscape, and the transformation that can occur when we 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>Facilitator: Seyron Foo, Vice President, Public Policy and Government Relations, Southern California Grantmakers</p>



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11:30 am – 12:15 pm	LUNCH
12:15 pm – 2:15 pm	<p><u>ETHICS IN GRANTMAKING</u></p> <p>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 interactive session, grantmakers discuss how they would respond to hypothetical situations and share their personal experiences with ethical challenges.</p> <p>Facilitators: Claire Peeps, Executive Director, The Durfee Foundation Vera de Vera, Director, Leadership for Movements, Weingart Foundation</p>
2:15 pm—2:25 pm	NETWORKING BREAK
2:25 pm—4:20 pm	<p><u>EVALUATION FOR LEARNING: HOW WE KNOW</u></p> <p>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.</p> <p>Facilitator: Kamella Tate, Principal, KTA/LLC</p>
4:20 pm – 4:30 pm	<p><u>CLOSING REMARKS/ADJOURN</u></p> <p>Chris Essel, President and CEO, Southern California Grantmakers</p>