



NORTHERN CALIFORNIA  
GRANTMAKERS

## SESSIONS

### **Session 1: Introductions, Framing, and the History of Philanthropy**

Description: Knowing the history of philanthropy, diversity and equity, and their relationship over time, can provide helpful context for understanding the current landscape. In this session, we will map the history of philanthropy and view it in relationship with the US Civil Rights timeline.

Session Objectives:

- To allow participants to get to know each other
- To understand the arc of the two days of the institute
- To provide participants an understanding of the historical roots of national and local philanthropy alongside key social movements

Faculty: Kate Seely

### **Session 2: The Unwritten Rules of Philanthropy**

Description: The Unwritten Rules of Philanthropy is a panel of seasoned (and opinionated!) experts that share about navigating a career with purpose in the field of philanthropy. Members of this seasoned and diverse panel will reflect on their experiences balancing their personal and professional selves, making values-based decisions, and clarifying personal and career missions. The panel will explore some of the nuances in philanthropy around power dynamics, equity, humility, and accountability.

Session Objectives:

- To hear seasoned leaders' perspectives on what a leadership journey in philanthropy can look like for those who are committed to social change
- To know what to pay attention to as you begin your journey in philanthropy
- To begin to hear about some of the nuances and complexities present in the philanthropic field

Faculty: Dimple Abichandani, Pia Infante, Allison Magee

### **Session 3: Navigating Your Journey as a Grantmaker**

Description: What do a matchmaker and a talent scout have in common? Or a strategist and an administrator? We'll discover the answers to that and more in this interactive session exploring the different roles of your work in philanthropy. We'll also have the opportunity to review a proposal and practice role playing in how to develop authentic relationships with grantees. We'll wrap up by uncovering the unwritten rules of networking and personal development in philanthropy.

Session Objectives:

- To gain an understanding of the different roles you can take in philanthropy
- To gain an enhanced and informed approach to creating authentic grantee relationships in the context of a proposal review
- To design a plan for investing in yourself

Faculty: Meaghan Calcari Campbell and Angie Chen

### **Session 4: Learning and Evaluation: Asking the Right Questions, Getting the Right Information**

Description: Grantmakers often wonder whether their grants are having an impact and what they can learn from their nonprofit partners that will help improve their funding strategies. In this session, we will share some essential ideas and approaches to help address those questions. Participants will be introduced to key principles of evaluation, explore how to develop good evaluation questions, and how integrating learning from evaluation processes can contribute to an organization's broader equity goals.

Session Objectives:

- To introduce basic evaluation concepts and how those can strengthen grantmaking
- To understand how different evaluation concepts and activities can help advance equity and inclusion
- To develop ideas for how evaluation and learning might fit into your own work

Faculty: Richard Vezina and Olivia Deich

### **Session 5: Natural Allies: Philanthropy & Advocacy**

Description: In this session, participants will explore the relationship between philanthropy and advocacy. Advocacy can often be a tricky and cloudy thing to fund – this session will help participants see clearly that philanthropy and advocacy are, in fact, natural allies.

Session Objectives:

- To learn how philanthropy and advocacy are natural allies
- To understand what is civil justice and why lawyers?
- To recognize that it is legal for 501(c)(3) public charities to lobby, and that it's legal for your foundation to invest in those organizations!

Faculty: Sara Matlin and Julia Wilson

## Session 6: Full Cost, Equity, and Impact

Description: As funders increase their focus on supporting equity, inclusive economies and opportunity for all, we must remember is not just about *what* you fund but *how* you fund. By better understanding what it *really* costs your grantees to deliver on mission, grantmakers can better structure their grantmaking and leverage their resources to support a more just, equitable, and sustainable society.

### Session Objectives:

- To understand how grant funding practices can unintentionally undermine equity goals
- To learn key steps you can take to better support impact without exploiting the sweat equity of your grantees
- To gain a better understanding of what it really cost grantees to deliver on mission

Faculty: David Greco

## Session 7: Meet Our Community Leaders

By this point, you will have heard a lot about the art and craft of grantmaking. This last session brings in together three individuals who lead nonprofits to ground what you've learned in the reality of a nonprofit leader. We will explore what wonderfully successful relationships with funders have looked like for these individuals, and we will also hear stories of when it hasn't gone so well. We'll dig in to what these leaders think is crucial for new grantmakers to know as they step into this work. They'll also share what they feel are opportunities for the field more generally.

### Session Objectives:

- To hear from nonprofit EDs on what it means in practice to raise funds for their organizations
- To hear stories of successful, and not-so-successful relationships with funders
- To ask questions of nonprofit EDs related to the content they've learned in the institute

Faculty: Kimberly Aceves-Iñiguez, Ellen LaPointe, and Oren Slozberg