Session Descriptions & Objectives

DAY ONE
Session 1: Introductions & Framing
Kate Seely

The first few hours of our two days together will be aimed at orienting people to the institute, to philanthropy at a high level, and to each other. Kate will offer opening remarks, frame our two days together, and facilitate some get-to-know each other activities.

Session Objectives:
- Get to know your fellow NGI participants
- Understand the purpose and flow of our two days together
- Build community agreements that will guide our time together

Session 2: The History of Philanthropy
Kate Seely

In this opening session, participants will gain an understanding of the historical roots of philanthropy alongside key social movements. We will have a chance to reflect on how philanthropy has been shaped by social movements, and how philanthropy supports (or hinders) social movements.

Objectives:
- Gain an understanding of the historical roots of philanthropy and how the evolution of philanthropy relates to social movements

Session 3: The State of the Sector
Dimple Abichandani, Pia Infante, Allison Magee, & Alice Y. Hom

The State of the Sector is a panel of senior, seasoned, and opinionated (!) experts who will share their experiences of the field of philanthropy today. Members of this panel will reflect on the state of the sector and its evolution over the past several years, as well as how they grapple with equity, humility, accountability, and power dynamics. They will comment on how they see the rest of the field grappling with the challenges that philanthropy is trying to positively impact, and share where we are living up to the intentions we set for ourselves, and where we still have some growing to do.
Objectives:
- Learn about the current moment of philanthropy – what opportunities and challenges we are facing as a sector in relationship to the state of our country.
- Hear about how three senior leaders from different types of foundations think about equity and accountability.
- Understand some of the skills leaders consider necessary to develop to be successful in philanthropy today.

Session 4: Mythbusters: Advocacy Funding
Sara Matlin

Think your foundation can’t support bold nonprofits fighting to protect and transform our communities? Think again! You’ll learn tips for public and private foundations funding organizations that are lobbying for community change. We’ll bust myths, build your confidence, and inspire you to strategize about funding advocacy.

Objectives:
- Learn about 501(c)(3) public charities’ freedom (and responsibility) to advocate and lobby.
- Learn about foundations’ flexibility for investing in organizations that advocate or lobby.

Session 5: Navigating Your Journey in Philanthropy
Jamie Allison, Charles Fields, & Kate Seely

Over the past several years of NGI, we have engaged faculty who have a deep commitment to their philanthropic practice. Navigating a career in philanthropy, however, is different than the actual work of grantmaking, and can be quite complex. It’s a field like no other, and requires both the development of the art and craft of grantmaking, as well the development of leadership skills relevant to philanthropy. It’s also a field that is plagued with power dynamics, both between foundations and nonprofit partners, as well as internally within foundations themselves. In this session you will hear from three individuals who have been in the field for some years now in different roles. They will share their experiences balancing their personal and professional selves,
making values-based decisions, clarifying personal and career missions, and seeking the most impactful professional and leadership development for their effectiveness.

Objectives:
- Hear how two senior leaders in philanthropy have navigated their careers in philanthropy
- Gain insights into what a career in philanthropy can look like, specifically where the opportunities for development and advancement lie

DAY TWO
Session 6: Learning & Evaluation: Asking the Right Questions, Getting the Right Information
Jara Dean-Coffey

This 1-hour session presents some of the big ideas in strategy, evaluation and learning. It offers a frame for strengthening the alignment among them in service of more accurate, meaningful and actionable intelligence than can inform on-going strategy.

Objectives:
- Awareness of the big ideas in learning and evaluation
- Introduction of the Evaluative Inquiry Cycle as a way to identify the “right” questions
- Opportunity to practice using the EI Cycle

Session 7: Your Roles in Developing Equitable Relationships with Grantee Partners
Angie Chen & Meaghan Calcari Campbell

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 our work in philanthropy. We’ll also think through how we can develop authentic relationships with grant partners and disrupt embedded power dynamics and practices, especially in the context of grant proposals and reporting.

Objectives:
- A shared understanding of the different roles we can take in philanthropy
- An enhanced and informed approach to learning about a grantee’s work and creating equitable grantee relationships in the context of a proposal process and grant reporting
**Session 8: Equity, Real Costs, and Impact**

David Greco

As funders increase their focus on supporting equity, inclusive economies and opportunity for all, how can grantmakers adapt their grantmaking practices and approach for greater impact? Supporting equity and economic opportunity 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 leverage their resources to support a more just, equitable and sustainable society.

Objectives:
- Key Steps you can take to better support impact without exploiting the sweat equity of your grantees
- A better understanding of what it really cost grantees to deliver on mission; and
- How to engage with grantees around financial needs and challenges

---

**Session 9: Meet our Community Leaders**

Kimberly Aceves-Iñiguez, Aimee Durfee, George Galvis, & Ellen LaPointe

This session offers an opportunity to bring all of our learning together, while hearing what it’s like for nonprofit leaders to engage with funders. We’ll be joined by three nonprofit leaders, all of whom have experience as funders as well, as they share their own experiences fundraising for their nonprofits, and how they translate their experiences as fundraisers into their roles as grantmakers. We’ll hear stories of both positive and difficult relationships, and we’ll hear how these leaders would transform philanthropy if they could wave a magic wand.

Objectives:
- Connect what we’ve been learning in NGI with real life experiences of individuals who are both nonprofit leaders and funders