

GRANTMAKER



AUDIENCE:

- **Individuals** new to grantmaking
- **Grantmakers** seeking a refresher course
- Foundation Board & Committee Members

UNDERSTAND How To:

- **Effectively** solicit and evaluate proposals
- **Make** wise funding recommendations
- **Manage** grants from approval to closure
- **Leverage** funding through partnerships
- **Implement** foundation law and ethics
- **Utilize** funding power for common good
- **Research** opportunities for on-going professional development and networking in the field



REGISTER TODAY!

SIX PART TRAINING REGIMENT:

Presents the core competencies of grantmakers as identified by practitioners and other experts in the field.

Navigating Legal and Ethical Issues

Jason Kohout, Partner
Foley and Lardner LLP

August 16

8:30 - 11:30 a.m.
Foley & Lardner, LLP

Making Sound Funding Decisions

Scott Gelzer, Owner & Operator
Management Cornerstones

September 11

8:30 - 11:30 a.m.
The Burke Foundation

Tina Quealy, Executive Director
The Burke Foundation

Managing the Grant Portfolio

Erin Frederick, Program Director
Zilber Family Foundation

October 17

8:30 - 11:30 a.m.
Zilber Family Foundation

Communicating Funding Recommendations and Decisions

Kathryn Leverenz, President and CEO
Mathematics Institute of Wisconsin

November 1

8:30 - 11:30 a.m.
Mathematics Institute of Wisconsin

Maximizing the Impact of Grants

Kathryn Dunn, Vice President
Greater Milwaukee Foundation

November 29

8:30 - 10:30 a.m.
Greater Milwaukee Foundation

Managing Personal and Professional Challenges

Jim Marks
United Way of Greater Milwaukee &
Waukesha County

November 29

10:30 - 11:30 a.m.
Greater Milwaukee Foundation

HOW TO REGISTER:

Online: <http://wiphilanthropy.org/events/grantmaker-boot-camp-2/>

Phone: Call Amanda Buckley, 262-317-6005 or abuckley@wiphilanthropy.org

Mail: Complete Registration Form and return with payment to:

Wisconsin Philanthropy Network
15850 W. Bluemound Road, Suite 204
Brookfield, WI 53005

SESSION:

UNDERSTAND:

BE ABLE TO:

NAVIGATING LEGAL AND ETHICAL ISSUES

- Basic laws and regulations affecting grantmaking
- Ethical issues common to grantmakers
- Strategies for managing ethical challenges

- Conduct grantmaking that is within customary due diligence requirements
- Recognize and manage ethical challenges

MAKING SOUND FUNDING DECISIONS

- Key characteristics of effective nonprofits
- Typical steps and best practices used in the proposal review process
- Issues to consider in arriving at a funding recommendation

- Assess the viability of the applicant and proposed project
- Know how and what additional information to gather
- Make defensible funding decisions

COMMUNICATING FUNDING RECOMMENDATIONS & DECISIONS

- Perspectives foundation leaders and trustees bring to funding decisions
- Typical steps and best practices in the funding recommendation process
- Issues and strategies for delivering funding decisions to applicants

- Prepare compelling funding recommendations
- Deliver final funding decisions to applicants

MANAGING THE GRANT PORTFOLIO

- Standard expectations and requirements of grants management
- Typical issues and effective practices in grants management

- Monitor grants and support grantee success
- Anticipate and manage grant execution problems
- Learn from grant experiences

MAXIMIZING THE IMPACT OF GRANTS

- Common strategies outside of the grantmaking framework for achieving greater good
- Pros and cons of each strategy

- Use common strategies to enhance the impact of grants
- Anticipate and manage grant execution problems probability of success, and the positive impact, of individual grants

MANAGING PERSONAL AND PROFESSIONAL CHALLENGES

- Inherent tensions in the role of the grantmaker
- Common practices for harmonizing personal wellbeing and professional excellence as a grantmaker
- Opportunities and resources for continuous learning and for on-the-job support

- Be a content and effective practitioner long-term
- Stay well-informed on emerging knowledge and practices of the field
- Benefit from resources for job-related support

REGISTRATION INFORMATION:

ATTEND THE FULL SIX-PART SERIES OR CHOOSE BY SESSION

Full Six-Part Session: Member | \$375; Non-Member | \$775

Each Session: Member | \$75; Non-Member | \$155



The series was a great way to begin, as I met colleagues that have become friends. *The series gave me a confidence in how I approached my work, a safe place to ask questions and a network to rely upon.* The relationships formed over the months in this series, are relationships that I will nurture in the years to come.

Mike Murphy, Kaztex Foundation

"I highly recommend the series! I found it to be an invaluable professional development opportunity."

Ben Dobner, formerly of Great Lakes Higher Education Guaranty Corporation