

# 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.

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### Navigating Legal and Ethical Issues

Jason Kohout, Partner  
Foley and Lardner LLP

**June 13**

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

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### Making Sound Funding Decisions

Tom Linfield, VP Community Impact  
Madison Community Foundation

**August 6**

8:30 - 11:30 a.m.  
Madison Community Foundation

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### Managing the Grant Portfolio

Rebecca Villareal  
Ascendium Education Group

**September 18**

8:30 - 11:30 a.m.  
Ascendium Education Group

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### Communicating Funding Recommendations and Decisions

Julie Bauer, Executive Director  
Adam Erdmann, Program Manager  
Alliant Energy Foundation

**October 15**

8:30 - 11:30 a.m.  
Alliant Energy Foundation

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### Maximizing the Impact of Grants

Steve Goldberg  
CUNA Mutual Group Foundation - Retired

**November 14**

8:30 - 10:30 a.m.  
The Madison Club

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### Managing Personal and Professional Challenges

Steve Goldberg  
CUNA Mutual Group Foundation - Retired

**November 14**

10:30 - 11:30 a.m.  
The Madison Club

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## HOW TO REGISTER:

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

**Phone:** Call Amanda Buckley, 262-317-6005 or [abuckley@wiphilanthropy.org](mailto: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