WISCONSIN PHILANTHROPY NETWORK

Grantmaking Fundamentals

Wisconsin Philanthropy Network's Grantmaking Fundamentals series is designed to help those who are new to philanthropy—or those wanting to update their skills—gain confidence in the essentials of effective grantmaking. By digging into both the building blocks of the field and current trends shaping the sector, participants will develop the working knowledge needed to navigate philanthropy with clarity and purpose. This series will be facilitated by Wisconsin Philanthropy Network in collaboration with experienced grantmakers and content experts from across the state.

Session 1: The Philanthropic Landscape – *Tuesday, February 3*

We'll begin the series by stepping back to look at the bigger picture of philanthropy—where it has come from, how it has developed, and the forces shaping it today. Participants will hear from peers representing different foundation types, gaining insight into the diverse roles and approaches that make up the sector. From there, we'll explore the major trends redefining practice, including impact investing, advocacy and public policy engagement, and trust-based philanthropy—identifying what these shifts mean for day-to-day grantmaking decisions. The session will close with an interactive Q&A, creating space for participants to reflect on how their own organizations fit within the broader sector.

Session 2: Inside the Grantmaking Process – *Tuesday, February 17*

This session will guide participants through the full cycle of a grant, from inquiry to reporting, with a focus on how to integrate diligence best practices at each step. We'll begin with an overview of the grantmaking cycle, underscoring the importance of clear, consistent processes that support strong decision-making. A member panel will then share real-world experiences of how the process plays out in practice, offering concrete examples of what works well—and what challenges often arise. A guided reflection activity will provide participants with the opportunity to step back, consider how grantmaking choices affect both internal operations and the experiences of applicants and grantees, and connect those insights to their own practice. The session will close with discussion and Q&A, leaving participants with practical strategies to strengthen their grantmaking processes.

Session 3: Building Authentic Relationships in Philanthropy – *Tuesday, March 3*

This session invites participants to take a closer look at how power operates within philanthropy and how it shapes relationships between funders, grantees, and communities. We'll begin by exploring the history and nature of power in the philanthropic sector, unpacking how both structure and intent influence who holds decision-making authority. Building on that foundation, we'll discuss practical approaches for cultivating trust-based, equitable relationships—grounded in transparency, humility, and shared learning. Participants will then engage in a reflection activity and small-group discussions to connect these ideas to their own experiences, considering how power shows up in their daily work and how they can use it more intentionally to build trust. The session will close with report-outs and Q&A, offering space to share insights and commitments to building more authentic, trust-centered practices.

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Session 4: Legal and Ethical Essentials – *Tuesday, March 17*

This session offers a practical grounding in the legal and ethical frameworks that shape responsible grantmaking. Participants will hear from experts on key compliance topics—including lobbying, self-dealing, and conflicts of interest—and discuss how these rules show up in real-world scenarios. We'll also explore the intersection between ethics and practice, examining how values-based decision-making can guide grantmakers through gray areas where the law offers limited direction. The session will also introduce advocacy fundamentals, helping participants understand what types of policy engagement are allowed for different types of foundations and how to approach this work with confidence. A reflection activity and small-group discussions will encourage participants to connect these concepts to their own work and identify strategies for navigating complex decisions with integrity.

Session 5: Understanding Nonprofit Financial Health – *Tuesday, April 7*

This session will help participants build confidence in understanding what nonprofit financial documents can—and cannot—reveal about an organization's health. With guidance from sector experts, participants will explore how to read and interpret key financial statements, gaining a clearer picture of the factors that influence stability and sustainability. We'll also challenge traditional definitions of risk, recognizing that nonprofit resilience is dynamic and cannot be fully captured by numbers alone. Through discussion and reflection, participants will consider how to balance quantitative assessment with qualitative insight, using financial information as one tool—rather than the only tool—for making thoughtful and equitable funding decisions.

Session 6: Impact and Learning in Practice – *Tuesday, April 21*

This session will explore how grantmakers can meaningfully assess the difference their funding makes—both for individual organizations and across broader systems. We'll start by grounding participants in different types of evaluation, highlighting when and how each approach is most useful. From there, we'll examine ways to understand and measure impact in complex systems, focusing on approaches that emphasize learning, shared accountability, and mutual benefit. Through reflection and small-group discussions, participants will consider how to align evaluation practices with their foundation's goals and values, and how to use what they learn to strengthen future grantmaking.

Session 7: Impact Investing 101 – *Tuesday, May 5*

This session introduces participants to the fundamentals of impact investing and how it complements traditional grantmaking. We'll start by defining key concepts—such as program-related investments (PRIs), mission-related investments (MRIs), and the "double bottom line"—and explore how foundations of different sizes and types are using these tools to advance their missions. Through real-world examples, participants will see what impact investing looks like in practice, including how to identify opportunities, assess alignment with organizational goals, and engage board or investment committee members in the conversation. The session will close with group discussion to help participants consider how their own organizations might begin—or expand—this work in practical, mission-driven ways.