

## **Basic Courses and Workshops on “GRANTMAKING” and “PHILANTHROPY”**

Below you will find a selection of courses and workshops that can be useful to professionals new to grantmaking and the foundation world, and to more seasoned staff who seek to deepen their knowledge and sharpen their skills (or just want a refresher).

### **New York University (NYU)**

Each semester, NYU-School of Continuing and Professional Studies offers several courses on “Grantmaking and Foundations” and on “Philanthropy”.

**DESCRIPTION:** Courses on Grantmaking and Foundations include:

- *Ethics and Laws of Nonprofits*
- *For Families Only: Seminar for Family Foundations and Philanthropists*
- *Law of Nonprofit Management*
- *Strategic Grantmaking I: Arts Funding*
- *Strategic Grantmaking I: Corporate Grantmaking*
- *Strategic Grantmaking I: Philanthropy's Influence on Foreign Policy and Development Advanced Mini-Intensive in Grantmaking*
- *Analyzing and Understanding Nonprofit Financial Statements*
- *Ethics and Laws of Nonprofits: Online*
- *Foundations of Philanthropy for Funders*
- *Mini-Intensive for New Philanthropists and Grantmakers*

Courses on Philanthropy include:

- *Annual Giving, Major Gifts, and Capital Campaigns*
- *Case Studies in Ethics*
- *Corporate and Foundation Fundraising*
- *Dynamics of Family Philanthropy*
- *Ethics and Laws of Nonprofits*
- *For Families Only: Seminar for Family Foundations and Philanthropists*
- *Fundraising Concepts and Practices: Develop a Fundraising Plan*
- *Getting Government Funding*
- *Global Philanthropy and Civil Society*
- *Grant Proposal Writing*
- *How to Be a Successful Fundraiser*
- *Law of Nonprofit Management*
- *Management Principles for Nonprofit Organizations*
- *Online and Mobile Fundraising*
- *Planned Giving*
- *Raising Funds for Higher Education Institutions*
- *Strategic Grantmaking I: Arts Funding*
- *Strategic Grantmaking I: Corporate Grantmaking*
- *Strategic Grantmaking I: Philanthropy's Influence on Foreign Policy and Development*
- *Technology Lab for Fundraisers*
- *Advanced Mini-Intensive in Grantmaking*
- *Always On/Always There: Leveraging Mobile Applications and Engaging Supporters*
- *Analyzing and Understanding Nonprofit Financial Statements*

- *Annual Giving, Major Gifts, and Capital Campaigns*
- *Cultivate Donors for Transformational Giving*
- *Ethics and Laws of Nonprofits: Online*
- *Foundations of Philanthropy for Funders*
- *Fundraising Concepts and Practices: Develop a Fundraising Plan*
- *Fundraising Concepts and Practices: Online*
- *Getting the Big Funders to Sign Onto Your Special Event*
- *Global Philanthropy and Civil Society*
- *Grant Proposal Writing*
- *Mini-Intensive for New Philanthropists and Grantmakers*
- *Planned Giving*
- *Stewardship: The Art of Thanking Donors*
- *Summer Intensive Certificate in Fundraising*
- *The Annual Appeal*

**WHEN:** For more information on when these courses are offered and on how to register, please visit <http://www.scps.nyu.edu/index/continuingEducation.htm?sid=174&durl=PHLA>

**FEES:** Please check <http://www.scps.nyu.edu/index/continuingEducation.htm?sid=174&durl=PHLA> for fees for each selected course.

## Council on Foundations

### Essential Skills and Strategies for New Grantmakers Workshop

**DESCRIPTION:** The "Essentials Skills and Strategies for New Grantmakers" workshop is designed to jump-start the careers of grantmakers who have been in the field less than two years and refocus more seasoned grantmakers who seek to deepen their knowledge and sharpen their skills. Seating is limited to 50. The curriculum was created through a partnership between the Council of Foundations and the Forum of Regional Associations of Grantmakers. In 2006 NCG was one of the first Regional Associations of Grantmakers to pilot this curriculum.

#### Sessions

1. Being Grounded in Philanthropy
2. Navigating Legal and Ethical Issues
3. Making Sound Funding Recommendations
4. Communicating Funding Recommendations and Decisions
5. Managing Your Grant Portfolio
6. Maximizing Grant Impact
7. Strategies for Professional Excellence and Personal Satisfaction

Please visit <http://www.cof.org/ess/curriculum.cfm> for session materials.

**WHEN: October 9, 2012, 9am to 5pm**

Location: El Paso Convention & Performing Arts Center, One Civic Center Plaza, El Paso, TX 79901  
*Immediately preceding the Grantmakers for Children, Youth & Families Annual Conference, to which CSF Members receive discounted registration*

**December 6, 8:30 am-5:45 pm & December 7, 8:45 am-4:30 pm**

Location: Council on Foundations Offices - 2121 Crystal Drive, Suite 700, Arlington, VA 22202

**FEES:**

**Fees for October workshop:** \$99 (this version of ESS is a shortened but comprehensive version of the full curriculum)

To register, please go to: [http://www.c-s-](http://www.c-s-f.org/schedule/calendar.asp?Mode=CalendarViewDetails&ID=439&Month=9&Year=2012)

[f.org/schedule/calendar.asp?Mode=CalendarViewDetails&ID=439&Month=9&Year=2012](http://www.c-s-f.org/schedule/calendar.asp?Mode=CalendarViewDetails&ID=439&Month=9&Year=2012)

**Fees for December workshop:** Council on Foundations Members: \$469; Non-Members: \$579

Early Bird Registration: Register by November 6 and save. \$419 Council members; \$529 nonmembers

**Contact:** [leaders@cof.org](mailto:leaders@cof.org) or call 703-879-0768.

## Council on Foundations

### Grantmaking Basics Online

**DESCRIPTION:** Grantmaking Basics Online is both a guide and an interactive learning tool program. It offers eleven chapters which include:

- Welcome to the Working Week: Roles and Responsibilities, Obstacles and Opportunities in a Grantmaker's Life
- Panning for Gold: How to Review Grant Proposals
- Conducting Site Visits and Interviews: A Guide for Program Officers
- Numbers and Sense: Learning to Look at Nonprofit Finances
- Between You and Your Board: Decisions, Recommendations and the Art of Communications
- Getting Better All the Time: Cultivating Professional Skills throughout Your Career
- Ethics: How to Resolve Tough Decisions
- The Art of Convening: Working with Our Nonprofit Partners
- Values for Foundations: A Guide for Grantmakers
- Setting a Straight Course: Orienting New Staff to the Foundation and to Their Jobs
- Rewards of Research: The Continuing Education of an Effective Grantmaker

**WHEN:** You can subscribe to Grantmaking Basics Online at any time by completing a subscription

<http://memberservices.cof.org/GrantmakingBasicsOnline/Docs/GrantmakingBasicsOnlineCourseSubscriptionForm.pdf>

**FEES:** COF Member Self-Study - \$80

- Access to Grantmaking Basics Online for 2 years
- Complementary copy of *Grantmaking Basics: A Field Guide for Funders*

### Grantmaking Basics Mentor Program

**DESCRIPTION:** This program connects experienced grantmakers with those just beginning their career. Grantmakers are matched based on similar interests and values in areas such as foundation focus, grant program areas, type of foundation, position and interests. Mentors act as coaches to help Protégés (mentees) understand the core skills needed to succeed as grantmakers. The duo will work together to achieve the learning objectives of Grantmaking Basics Online (see above). You'll

- Understand the grant review process
- Decipher the complexities associated with financial reports
- Organize and implement successful site visits
- Effectively evaluate and measure foundation performance
- Increase your performance at work
- Cultivate the art of board communications

- Identify professional development options for your career
- Learn to resolve tough decisions
- Discover how nonprofit partners work together
- Find out why values are essential to foundations and grantmakers
- Orient new hires to the foundation and their jobs
- Use research effectively in your grantmaking

**WHEN:** You can subscribe to the Grantmaking Basics Mentor Program at any time by completing a protégé subscription and profile form. To register please go to <http://memberservices.cof.org/GrantmakingBasicsOnline/Docs/GrantmakingBasicsOnlineCourseSubscriptionForm.pdf>

**FEES:** \$125 for participation in the Mentor Program and the Grantmaking Basics Online Course.

## Emerging Practitioners in Philanthropy (EPIP)

### **Philanthropology:**

Philanthropology is a four-module curriculum designed to be a graduate-level introduction to the field of philanthropy. Each module includes different workshops and toolkits. The four modules are:

1. Understanding Philanthropy – The History and Tradition of Philanthropy in the United States
2. Social Justice Philanthropy – An Introduction to Social Justice Philanthropy, and an advanced workshop looking more closely at Racial Equity Grantmaking
3. Navigating Power Dynamics – Power dynamics that exist the nonprofit sector between donors/funders, grantees, and grantmakers
4. Intergenerational Learning – Increasing learning opportunities for knowledge exchange between the generations

**WHEN:** EPIP offers iterations of each module at the EPIP Annual National Conference and at EPIP Chapter sites. They can also bring one or more modules in-house. Please reach out to Cristina Parnetti ([cparnetti@sorosny.org](mailto:cparnetti@sorosny.org)) if you are interested in Philanthropology.

## Grantmakers for Effective Organizations (GEO)

### **Evaluating Place Based Initiatives (Community of Practice):**

**DESCRIPTION:** A day of peer learning and discussion about what it takes to measure progress toward sustainability of comprehensive, systemic and collaborative approaches to community change. The day features:

- **Discussion with experts**, including David Chavis and Scott Herbert from Community Science who will discuss issues relating to the strategic planning for and measurement of scale and sustainability in place-based efforts.
- **Facilitated small group work** on the essentials of successful community initiatives, including: nurturing community collaboration and civic engagement, building community evaluation capacity, working with data intermediaries, sharing data and using data for performance improvement.
- **Peer-exchange** with representatives from GEO member organizations and federal agencies regarding critical issues in evaluating place-based grantmaking.

**WHEN:** Friday, July 20, 2012, 10 am to 4 pm in Washington DC.

**FEES:** This event is open only to GEO members. Registration is free. Space is limited. To register, please contact Jess Maloney ([Maloney@geofunders.org](mailto:Maloney@geofunders.org)) by July 2.

## **Strategic Co-Funding: A Grantmaker Convening**

**DESCRIPTION:** Join 150 grantmakers for a convening to explore different approaches to strategic co-funding, presented by GEO as part of the *Scaling What Works* initiative. This day-long convening, designed for grantmakers currently involved in or interested in being part of strategic co-funding partnerships, will offer participants opportunities to deepen their knowledge and advance their practice around key areas such as:

- building trust;
- developing joint strategies, goals and common processes (e.g., due diligence, reporting);
- coordinating with public systems, policy and funders; and
- collectively raising, administering and evaluating pooled grant dollars.

**WHEN:** Oct. 29, 2012

**LOCATION:** GEO: 1725 DeSales Street, NW, Suite 404, Washington, DC 20036

**FEES:** Priority registration opens for GEO members July 25 – August 8 @ \$350. Late registration Sept.13 – Oct. 29 @ \$450. Note that each GEO member organization is limited to two registrations. If an organization would like to register more than two individuals, they need to send the contact information for the individuals to [registration@geofunders.org](mailto:registration@geofunders.org) and they will be added to a wait list. If space should remain available after August 8 these individuals will be accommodated on a first come first served basis, according to GEO's wait list removal policy and dependent on space availability.

## **The Johnson Center for Philanthropy (at Grand Valley State University)**

**DESCRIPTION:** Established in 1992 with support from the Kellogg Foundation, the Dorothy A. Johnson Center for Philanthropy is an academic center focused on increasing the efficiency and effectiveness of the charitable sector. The Center is a unit of the College of Community and Public Service at Grand Valley State University in Grand Rapids, MI. Instructors include a mix of consultants, academics and foundation practitioners.

The Center's Grantmaking School provides three advanced education courses in the area of grantmaking and philanthropy:

- 1) Advanced Grant Portfolio Management
- 2) Advanced Proposal Analysis
- 3) Grant Financial Analysis

### **1) Advanced Grant Portfolio Management**

This is an intensive two-day learning experience designed to help individual grantmakers and their foundations develop or refine a strategic lens to grantmaking and leverage improved program results for deeper impact. Beginning with mapping the elements of a theory of change framework, you will use this as a guiding template to build and inform your grantmaking strategy. From there, you and your colleagues will move through a series of individual and group activities, allowing for both interactive and personal reflection throughout the session.

**Key concepts include:**

- Building and working with a strategic change framework,

- The many ways foundation professionals can and should add value to their grantmaking,
- Grantmaker techniques and cautions in providing value and ensuring alignment,
- The role of strategic communications in ongoing strategy development,
- The role of evaluation in strategic grantmaking,
- Capacity building: principles, design, and relevance, and
- Leadership core competencies needed for effective grantmaking.

Advanced Grant Portfolio Management is designed for foundation program staff or other grantmaking professionals with three to five years of experience. Classroom size is limited to 30 participants, allowing for deeper engagement and discussion with both colleagues and instructors.

#### **TUITION AND SCHOLARSHIPS:**

Tuition for Advanced Grant Portfolio Management is \$1,295, exclusive of travel and lodging. Alumni of The Grantmaking School receive a \$250 discount. Scholarships are available for qualifying organizations. Members of Emerging Practitioners in Philanthropy (EPIP) and Friends of the Family members of the National Center for Family Philanthropy (NCFP) are eligible for a discount.

**WHEN:** Please visit <http://www.gvsu.edu/jcp/advanced-grant-portfolio-management-a-framework-for-strategic-grantmaking-180.htm> for upcoming dates for this course.

#### **2) Advanced Proposal Analysis**

The Grantmaking School recognizes that for most grantmakers, working with applicants and proposals is the bread-and-butter of their career and how they spend much of their time. In response, Advanced Proposal Analysis intentionally focuses on the essential skills of proposal review, recommendations, project management, and other core competency areas. We strongly believe that mastering this work is the key to excellence in grantmaking

#### **Key concepts include:**

- Assessing proposals more efficiently,
- Spotting financial red flags,
- Finding and closing any gaps in your due diligence process,
- Using specialty grants within your organization's mission,
- Assuring transparent and ethical behavior,
- Grantee relationship management, and
- Capturing the knowledge from grantmaking.

Classroom size is limited to 30 participants, allowing for deeper engagement and discussion with both colleagues and instructors.

#### **TUITION AND SCHOLARSHIPS:**

Tuition for Advanced Proposal Analysis is \$1,295, exclusive of travel and lodging. Alumni of The Grantmaking School receive a \$250 discount. Scholarships are available for qualifying organizations. Members of Emerging Practitioners in Philanthropy (EPIP) and Friends of the Family members of the National Center for Family Philanthropy (NCFP) are eligible for a discount.

**WHEN:** Please visit <http://www.gvsu.edu/jcp/advanced-proposal-analysis-a-critical-examination-of-complex-issues-128.htm> for upcoming dates for this course.

#### **3) Grant Financial Analysis**

Excellence in grantmaking is not limited to program knowledge. It requires a comprehensive understanding of nonprofit organizations, including their financial statements, budgets, reserves, policies and processes for resource management.

In fact, we all know that financial issues impact programmatic results. As a part of routine due diligence, many grantmaking organizations conduct a financial review after the programmatic review. We strongly believe only the assigned program officer has the ability to understand fully the context, implications and impact of financial issues upon the success of any grant.

In response, we created Grant Financial Analysis. This course does not attempt to transform program officers into financial professionals. Instead, our intent is to provide grantmakers with the necessary knowledge and skills to conduct a comprehensive and effective analysis of organizational and programmatic financial information to improve funding decisions.

**Key concepts include:**

- Creating a culture of comprehensive grant analysis,
- The relationship of financial condition to effective grantmaking,
- Fundamentals of grant financial review and analysis,
- Connecting grant budgets to funded program activities,
- The role of organizational capacity in producing program results, and
- Financial accountability in the post-grant process.

Grant Financial Analysis is designed for all grantmaking professionals with at least two years of grantmaking experience. Classroom size is limited to 30 participants, allowing for deeper engagement and discussion with both colleagues and instructors.

**TUITION AND SCHOLARSHIPS:**

Tuition for Grant Financial Analysis is \$1,295, exclusive of travel and lodging. Alumni of The Grantmaking School receive a \$250 discount. Scholarships are available for qualifying organizations. Members of Emerging Practitioners in Philanthropy (EPIP) and Friends of the Family members of the National Center for Family Philanthropy (NCFP) are eligible for a discount.

**WHEN:** Please visit <http://www.gvsu.edu/jcp/grant-financial-analysis-181.htm> for upcoming dates for this course.