

# Off-site Upcoming Learning & Training Opportunities

## October – Free Events

### Assessing Foundation Effectiveness: Three True-to-Life Stories

Offered by: Philanthropy New York

Date and Time: October 8, 2009, 2:30-5pm

Location: Philanthropy New York, 79 Fifth Ave., 4th floor, NYC

This is an OSI affinity group. There is no cost for OSI staff. Registration is required by October 6, 2009. Please register at:

[http://www.philanthropynewyork.org/issifiles/members\\_online/registration/regmulti.asp?action=confirm&mt=091008DM&af=NY&rn=0&CID=117&DID=28002](http://www.philanthropynewyork.org/issifiles/members_online/registration/regmulti.asp?action=confirm&mt=091008DM&af=NY&rn=0&CID=117&DID=28002)

Program Description: This session looks at how three foundations - [The Edna McConnell Clark Foundation](#), [Gap Foundation](#), and [Altman Foundation](#) - have tackled the complex job of assessing their effectiveness.

There is increasing internal and external interest in whether foundations are effective and how that might be determined. Yet, given the uniqueness of each foundation, the difficulties of assessment are many. Effectiveness is greatly affected by mission, types of programs, and many other variables, some of which are beyond a foundation's control. Each foundation will want to measure different elements, and many indicators are exceptionally difficult to track, especially within a reasonable timeframe.

Rather than discussing why assessment is important, this session examines how three foundations are actually figuring it out in different ways and with different emphases. In each case, outside assistance and the perspective of knowledgeable consultants has helped shape a reasonable strategy and implementation of assessment tools. During the panel discussion each foundation leader will be joined by a consultant who has helped the foundation with its respective efforts.

#### PRESENTERS

Chuck Hamilton (moderator), Senior Fellow, [Philanthropy New York](#)

Kelly Fitzsimmons, Director of Corporate Initiatives, [The Edna McConnell Clark Foundation](#)

Gail Gershon, Director, Employee Engagement, [Gap Foundation](#)

Karen Rosa, Vice President and Executive Director, [Altman Foundation](#)

Gary Walker, Chair, Evaluation Advisory Committee, [Edna McConnell Clark Foundation](#)

Hal Williams, Senior Fellow, [The Rensselaerville Institute](#) (for Altman Foundation)

Peter York, Senior Vice President and Director of Research, [The TCC Group](#) (for Gap Foundation).

### Diversity in Philanthropy: A Study of the New York Philanthropic and Nonprofit Sectors

Offered by: Philanthropy New York

Date and Time: October 13, 2009, 8:30-11:30am

Location: Philanthropy New York, 79 Fifth Ave., 4th floor, NYC

This is an OSI affinity group. There is no cost for OSI staff. Registration is required by October 6, 2009. Please register by October 9 at:

[http://www.philanthropynewyork.org/issifiles/members\\_online/registration/regmulti.asp?action=confirm&mt=091013C2&af=NY&rn=0&CID=117&DID=29155](http://www.philanthropynewyork.org/issifiles/members_online/registration/regmulti.asp?action=confirm&mt=091013C2&af=NY&rn=0&CID=117&DID=29155)

Program Description: In 2007, Philanthropy New York realized that our work regarding diversity had proceeded ungrounded by any research-based knowledge about the racial and ethnic demographics of New York-area nonprofits and foundations, their institutional data, and their organizational capacities. As part of the [New York Diversity In Philanthropy Project](#), and in partnership with the Foundation Center, surveys were created and sent to philanthropic organizations - including all Philanthropy New York members- and nonprofit organizations in the New York metropolitan area.

This briefing will examine the survey findings and provide an opportunity for attendees to understand the data, including its limitations and significance; ask questions about research methodology; and discuss the philanthropic sector's possible next steps.

### **Managing Up: Enhancing Organizational Communication**

Offered by: Philanthropy New York

Date and Time: October 14, 2009, 8:30-11am

Location: Philanthropy New York, 79 Fifth Ave., 4th floor, NYC

This is an OSI affinity group. There is no cost for OSI staff. Please register at:

[http://www.philanthropynewyork.org/s\\_nyrag/doc\\_event.asp?CID=117&DID=29447](http://www.philanthropynewyork.org/s_nyrag/doc_event.asp?CID=117&DID=29447)

Program Description: In most professional roles, you interact with managers, peers, and organizational leaders. How effectively you work with each individual depends heavily on your own skills. This workshop, led by consultant Deborah Howard, is designed for those interested in learning how to better communicate and work more effectively with supervisors and peers. It will provide participants with concepts and tools to enhance mutual understanding, communication, and effectiveness.

Attendees will:

- Understand what it means to “manage up.”
- Use exercises to identify how your perspective on a working relationship might differ from that of a colleague.
- Learn to identify different communication styles.
- Use case studies to practice techniques for managing various work scenarios.
- Identify steps you can take to work more effectively with colleagues.
- The skills that you will learn in this workshop can also be applied to working with those who report to you.

### **Foundations of Modern Philanthropy: Private Wealth to Public Good, 1889-2009**

Offered by: 2009 Carnegie Medal of Philanthropy & The Graduate Center, City University of New York

Date and Time: October 15, 2009, 8:30-11:30am

Location: Proshansky Auditorium, Graduate Center, City University of New York, 365 Fifth Avenue, New York, NY 10016

Please register at: <http://events.cuny.edu/eventDetail.asp?EventId=24479>

Program Description: 2009 Carnegie Medal of Philanthropy, in cooperation with the Graduate Center, City University of New York, presents a roundtable discussion with:

- Peter J. Johnson, Author of *The Rockefeller Century*, and *The Rockefeller Conscience* (both with J. E. Harr);
- David Nasaw, Author of *Andrew Carnegie*
- Patty Stonesifer, Special Advisor to the Trustees, Bill and Melinda Gates Foundation
- Jean Strouse, Author of *Morgan, American Financier*

### **Poverty and Welfare in the United States – A Human Rights Violation?**

Offered by: Association of the Bar of the City of New York

Date and Time: October 15, 2009, 6-8pm

Location: Association of the Bar of the City of New York, House of the Association, 42 West 44<sup>th</sup> Street

No cost to OSI. Please register at: <https://www.nycbar.org/EventsCalendar/register/?event=1221&price=901>

Program Description: How extensive is poverty in the United States and how well does our social welfare system perform in preventing and ameliorating poverty? Do our anti-poverty policies comport with Human Rights norms? Hear from a panel of experts on poverty, social welfare, and the application of human rights principles to issues of poverty and social welfare.

Moderator:

TIMOTHY CASEY, Senior Attorney, Legal Momentum

Speakers:

CATHERINE ALBISA, Executive Director, National Economic & Social Rights Initiative

MARTHA DAVIS, Associate Dean and Professor, Northeastern University School of Law

JANET GORNICK, Director of Luxembourg Income Study and Professor of Political Science & Sociology, CUNY-Graduate Center

### **Nonprofit Mergers Revisited: Lessons Learned**

Offered by: Philanthropy New York

Date and Time: October 22, 2009, 8:30 - 11am

Location: 79 Fifth Avenue 4th floor, NYC

Registration: Free to OSI. Please register by October 23 at:

[http://www.philanthropynewyork.org/s\\_nyraq/doc\\_event.asp?CID=117&DID=28475](http://www.philanthropynewyork.org/s_nyraq/doc_event.asp?CID=117&DID=28475)

Program Description: As nonprofits continue to face daunting economic challenges, funders are considering the long-term implications of the recession and searching for ways to better position the sector as a whole, as well as individual grantees. The topic of nonprofit mergers and collaborations continues to be of keen interest to funders nationally. These strategies can be quite successful, notwithstanding increased recognition of the complexities involved. The role that funders can play is similarly complex and requires commitment and care.

This session will examine some specific elements of mergers and collaborations: cost of supporting the process, the length of time it takes, challenges of blending organizational cultures, the implications for service delivery, sustainability, and ongoing funder involvement. David La Piana has spent twelve years studying this issue, and has consulted on more than 100 mergers. He will provide an overview of nonprofit mergers and other forms of capacity building partnerships currently attracting the attention of the funding community. He will then join a panel structured around two specific examples of the nonprofit merger process - one successful and the other terminated before completion - to consider lessons learned.

#### PRESENTERS

Don Crocker, Executive Director, **Support Center for Nonprofit Management**.

Chuck Hamilton, Senior Fellow, Philanthropy New York; former Executive Director, The Clark Foundation.

David La Piana, President, **La Piana Consulting**.

Ralph Rogers, Executive Vice Chair, **Food Bank for New York City**.

### **Why Fund Advocacy, Organizing, and Civic Engagement? Grantmaking for Community Impact**

Offered by: Philanthropy New York

Date and Time: October 27, 2009, 8:30 - 11am

Location: 79 Fifth Avenue 4th floor, NYC

Registration: Free to OSI. Please register by October 23 at:

[http://www.philanthropynewyork.org/issifiles/members\\_online/registration/regmulti.asp?action=start&mt=091027DM&af=NY&CID=117&DID=28356&token=4D82C2F0935C3BD0EB7A9D6F03E7A75D66AFD238BA11A06D24722593889E8AF1](http://www.philanthropynewyork.org/issifiles/members_online/registration/regmulti.asp?action=start&mt=091027DM&af=NY&CID=117&DID=28356&token=4D82C2F0935C3BD0EB7A9D6F03E7A75D66AFD238BA11A06D24722593889E8AF1)

Program Description: In turbulent times, nonprofit advocacy, organizing, and civic engagement are as essential to community impact as providing basic services. For more than a year, the National Committee for Responsive Philanthropy's Grantmaking for Community Impact Project has been researching the difference that nonprofits in communities around the country have made using these strategies, producing reports of community impact in New Mexico, North Carolina, and Minnesota. The results, including success stories and return-on-investment calculations, are a key rationale for why NCRP encourages grantmakers to devote at least 25 percent of their grant dollars to these strategies. NCRP brings the results of all three place-based reports together to make the case for increased philanthropic investment in advocacy, organizing, and civic engagement in New York. NCRP's experts will be joined by Abigail Disney, an experienced New York grantmaker, who will share how staff and trustees think about impact, how they got involved in these strategies, and the difference it has made for the local communities her foundation serves. Discussion will follow to explore the implications of NCRP's findings for New York and the obstacles and opportunities for New York funders seeking to support nonprofit advocacy, organizing, and civic engagement at higher levels.

#### PRESENTERS

- Abigail E. Disney, Co-Founder and Co-President, Daphne Foundation.
- Aaron Dorfman, Executive Director, National Committee for Responsive Philanthropy.
- Lisa Rangelilli, Senior Research Associate, National Committee for Responsive Philanthropy.