

## Grantmaking Fundamentals Workshop Detailed Agenda

<i>Coffee and Registration</i>	8:00AM – 8:30AM
<p><b>The Philanthropic Landscape</b> Participants get to know one another and put their own foundation or giving program within the broader context of philanthropy.</p> <p>Learning Results</p> <ul style="list-style-type: none"> <li>• key facts and historic events in the development of philanthropy</li> <li>• the infrastructure that supports philanthropy</li> <li>• current trends and debates about philanthropy</li> </ul>	<p>8:30AM – 9:30AM</p> <p>Elisabeth Hyleck, Association of Baltimore Area Grantmakers</p>
<p><b>Developing Guidelines and Communicating Funding Priorities</b> Participants reflect on their organizations’ areas of interests and goals, as well as communicating with potential grantees and partners.</p> <p>Learning Results</p> <ul style="list-style-type: none"> <li>• establishing strong mission statements and grant guidelines</li> <li>• understanding types of grants and ways to give</li> <li>• communicating effectively with grantees</li> </ul>	<p>9:30AM – 10:30AM</p> <p>Ann Billingsley, Hoffberger Family Philanthropies and Jonalyn Denlinger, Association of Baltimore Area Grantmakers</p>
<i>break</i>	<i>15 minutes</i>
<p><b>Funding Recommendations and Due Diligence</b> Participants learn the art of grantmaking, balancing organizational values and goals, trustees’ interests, and best practices in due diligence to better review and recommend grant proposals.</p> <p>Learning Results</p> <ul style="list-style-type: none"> <li>• typical steps and best practices in the proposal review process</li> <li>• how to determine a proposal’s relevance and fit to your foundation culture</li> <li>• an introduction to nonprofit financial statements</li> <li>• best practices in presenting recommendations to the board and communicating with grantseekers and grantees</li> <li>• how to conduct a valuable site visit</li> </ul>	<p>10:45AM – 12:15PM</p> <p>Amy Gross Executive Director, France Merrick Foundation and Beth Harber, The Abell Foundation</p>
<i>lunch</i>	<i>30 minutes</i>

**ABAG's Guiding Principles and Ethics**

Participants are introduced to key legal and ethical issues in grantmaking through scenarios and ABAG's *Guiding Principles*.

- the basic rules of *expenditure responsibility*
- definition and how to avoid *self-dealing*
- the role of *conflicts of interest* policies
- strategies for managing common ethical challenges

12:45PM – 1:30PM

Mike Brannan, The Annie E. Casey Foundation and Elisabeth Hyleck, Association of Baltimore Area Grantmakers

**Maximizing Grant Impact**

Participants connect capacity building, advocacy, grantee engagement, and diversity/inclusion to effectiveness and identify leadership roles in philanthropy beyond delivering dollars.

Learning Results

- key strategies to leveraging grant dollars
- considerations for working with government
- the importance of diversity, equity, and inclusion to effective grantmaking

1:30PM – 2:30PM

Erika Seth Davies, The Baltimore Community Foundation, and Elisabeth Hyleck, Association of Baltimore Area Grantmakers

*break*

*15 minutes*

**Managing Your Grant Portfolio**

Participants discuss grant monitoring, evaluation, and closure – including what to do when grantees flounder.

Learning Results

- an overview of the types and purpose of evaluation
- the design of grant reports
- effective practices in working with nonprofits to support their success

2:45PM – 3:45PM

Misty Gibson, Meyerhoff Family Charitable Trusts and Jonalyn Denlinger, Association of Baltimore Area Grantmakers

**Continuing to Learn**

Participants discover additional resources for professional development and develop a personal learning agenda.

Learning Results

- opportunities and resources, both national and local, for continuous learning
- strategies for staying attuned to your grant interest area
- strategies for fostering personal satisfaction from your work

3:45PM – 4:00PM

Jonalyn Denlinger, Association of Baltimore Area Grantmakers