

Grantmakers' Fundamentals Workshop Series 2024-2025 Agenda



A four-part professional development workshop series taught by our region's experienced practitioners, presented by Maryland Philanthropy Network

[Session 1](#): November 18, 2024, 1:00 - 3:00 PM EST

Welcome & Introductions

The Philanthropic Ecosystem

Participants get to know one another and locate their own foundation or giving program within the broader context of philanthropy.

We will cover

- History and current data about foundations and the philanthropic sector
- Charitable giving trends with national and local philanthropies
- Current movements and debates in philanthropy

Working your Guidelines and Communicating Funding Priorities

Participants reflect on their organizations' areas of interests and goals, as well as communicating with potential grantees and partners.

We will cover

- Aligning grant guidelines and types of grants to your values
- Rationale, tips, and tools for communicating to the public and your communities

[Session 2](#): December 9, 2024, 1:00 - 3:00 PM EST

Making Sound Funding Recommendations and Due Diligence

Participants learn the art of grantmaking, balancing organizational values and goals, trustees' interests, applicant relationships and best practices in due diligence to better review and recommend grant proposals.

We will cover

- how to determine a proposal's relevance and fit for your foundation culture
- unconscious bias in your proposal review process
- best practices in presenting recommendations to the board
- communicating with grantseekers and grantees as partners
- Considerations around valuable site visits

Legal and Ethical Issues

Participants are introduced to key legal and ethical issues in grantmaking through scenarios.

We will cover

- 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

Session 3: January 13, 2025, 1:00 - 3:00 PM EST

Nonprofit Finance

Participants will learn how to read and understand financial statements to assess the health of an organization. They will also learn what questions to ask and understand how to interpret the numbers based on a nonprofit organization's lifecycle or business model. Participants will:

- have an increased understanding of the basic components of nonprofit financial statements; what to look for when reviewing nonprofit financial statements including key metrics; and tools and tips to assist in the review process.
- practice reviewing financial statements and be more comfortable with the process.
- have an increased understanding of role of Financial Due Diligence in grantmaking and its intersection with equity considerations.

Session 4: February 3, 2025, 1:00 - 3:00 PM EST

Maximizing Grant Impact

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

We will cover

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

Managing Your Grant Portfolio

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

We will cover

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

Continuing to Learn

Participants discover additional resources for ongoing development.

We will cover

- Opportunities and resources, both national and local, for continuous learning
- Networks to support your work
- Strategies for fostering personal satisfaction from your work