

Grantmaking Basics: Grantmaker Education Workshops for 2004

Whether you are a charitable donor, a new grantmaker, or have prior grantmaking experience, you can benefit from these workshops. Participants at our 2003 Conference in Cooperstown gave these courses top marks, averaging a score of 4.6 on a scale of 1 to 5. Workshops are open to all types of funders including: staff, trustees and volunteers from private, public and community foundations; corporate foundations and giving programs; government officials or employees who distribute public funds; other philanthropic organizations; and individual donors.

Location

All workshops will meet at:

**Frontier Learning and Conference Center
2060 Brighton-Henrietta Townline Rd.
Henrietta**

This facility is generously provided by Frontier Communications of Rochester, Inc.

Registration

Workshop fees (per workshop):

- **\$40 Rochester Grantmakers Forum and Funders Alliance of Upstate New York members**
- **\$55 Non-members.**

Each workshop may be taken separately. Fee includes a light breakfast and workshop materials. Find course summaries inside.

Building A Philanthropic Community

Rochester Grantmakers Forum

Rochester Grantmakers Forum
919 Winton Road South
Rochester, NY 14618-1633

Non-Profit Org.
U.S. Postage
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Rochester, NY
Permit No. 726

Legal and Ethical Responsibilities of Investing in Community

Thursday, February 26, 2004, 8:30-11:30 a.m.

Presenter: Michael Cooney, Nixon Peabody LLP

This workshop will provide an introduction to the legal rules which govern donors and their relationships with grantees. It will explore the grantmaking process in the context of this relationship and help grantmakers insure that *their* money gets spent as *they* intend. Attorney Michael Cooney concentrates on matters related to non-profit and educational organizations, their corporate governance, fundraising, state regulation and taxation. His practice includes clients ranging from private colleges and universities, hospitals and health care systems, social clubs, trade associations, private foundations and religious organizations

Interpreting Nonprofit Financials

Thursday, March 11, 2004, 8:30-11:30 a.m.

Presenter: Joyce Martelli, CPA, Chief Financial Officer, Lifespan

This workshop will review financial statements, how to read agency budgets, comparing logic models to program budgets and the value of IRS form 990. Participants will learn about the nonprofit budgeting process and how to spot warning flags in financial statements for specific programs. Requires familiarity with 990 form, balance sheet and income statement, and basic understanding of net asset classifications (permanently, temporarily, and unrestricted). Joyce Martelli has over 15 years experience as a CPA and has chosen not-for-profit accounting as her area of specialization. She was a manager for a large local CPA firm and has audit and operational management experience in the area of nonprofits of various agencies.

Strategies for Program Evaluation

Thursday, March 25, 2004, 10:00 a.m.-12:30 p.m.

Presenter: Claire Higgins, Associate Executive Director, Council of Community Services of New York State

This workshop will explore the critical link between identifying program goals and developing appropriate evaluation strategies from needs assessment through process and outcome evaluation. Strategies and examples of each type of evaluation will be presented with typical data collection methods and tools. Participants will discuss how this information applies to the grantmaking and review process. Claire Higgins has primary oversight responsibility for the Council's Division of Planning, Evaluation, and Research. She has had a broad range of experience with health and human services delivery issues, program development and evaluation and grant development and review processes.



To register, please complete this form and mail with check made payable to Rochester Grantmakers Forum. We will also accept registration by fax (585.232.8413) or email (register@grantmakers.org) with a subsequently mailed check.

Name _____

Organization _____

Street Address _____

City/State/Zip _____

Email _____ Phone _____

Please select which workshop(s) you would like to attend and send in your payment accordingly:

Legal and Ethical Responsibilities Interpreting Financials Evaluation Total: \$ _____

(Per workshop: \$40 member; \$55 non-member)