



May 2008

Montgomery County Funders Meeting

DATE: Friday, May 9, 2008
TIME: 11:30 AM to 1:00 PM
LOCATION: North Penn Community Health Foundation, 2506 N. Broad Street, Suite 206, Colmar, PA

Following up on the group's inaugural meeting in April, this gathering of DVG's Montgomery County Funders will include discussion of:
- the frequency and format for future meetings;
- an examination of county issues of interest for future programming; and
- an overview of the Core Capacity Assessment Tool (CCAT)

>> For further information or to register, contact Lisa Bennett Stokes at lisa@dvg.org or 610-688-7277.

Cities in Transition: An Urban Revitalization Strategy for New Jersey

DATE: Tuesday, May 13, 2008
TIME: 9:30 AM to 12:00 PM
LOCATION: Thomas Edison State College/ Prudence Hall, 101 West State Street Trenton, NJ 08608 *

RSVP: * By 5/9 to Joan Burkhardt at jburkholtz@cnjg.org

***You must mention that you are a DVG member to receive free admission to this event.**

The Council of New Jersey Grantmakers, Geraldine R. Dodge Foundation, William Penn Foundation, and Funders' Network for Smart Growth and Livable Communities invite you to take part in an interactive funders' briefing and strategic discussion about new initiatives and opportunities for foundation investment and leadership in the redevelopment and revitalization of New Jersey's older cities and towns.

Cities in Transition: An Urban Revitalization Strategy for New Jersey is intended to stimulate ongoing thinking and discussion about how funders can help to position these communities as innovation laboratories by building on advantages inherent in their diversity, density, compactness, and proximity to major markets and transportation systems.

The agenda will feature a presentation on the public sector's vision for revitalizing New Jersey's older cities followed by a moderated panel discussion centering on a soon-to-be-released statewide report featuring a bold new urban transformation policy agenda and action plan.

Presenters will include:

- **Joseph Doria**, Commissioner, New Jersey Department of Community Affairs
- **Feather Houstoun**, President, William Penn Foundation
- **Alan Mallach**, Senior Fellow, National Housing Institute
- **Mark Murphy**, President, Fund for New Jersey
- **Diane Sterner**, Executive Director, Housing and Community Development Network of New Jersey
- **Peter Kasabach**, Executive Director, New Jersey Future

* >> For directions to Thomas Edison State College visit: <http://www.tesc.edu/aboutus/3493.php>

Assessing Nonprofit Organization Readiness for Capacity Building

DATE: Wednesday, May 14, 2008
TIME: 9:00 to 11:00 AM
LOCATION: North Penn Community Health Foundation, 2506 N. Broad Street, Suite 206, Colmar, PA 18915

RSVP: By 5/6 to Christina at christina@dvg.org

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Come meet fellow grantmakers and learn about how to assess nonprofit organization readiness for capacity building. This session will allow participants to learn how to assess nonprofit organization readiness for capacity building, and if they are not ready how to get them ready. Non-cash strategies that support capacity building will be included in the discussion.

Participating panelists include:

Nonprofit Perspective:

- **Shawn Lacy**, Executive Director, Family Support Services
- **John Strader**, Board Chair

Provider Perspectives:

- **Adrienne Jenkins**, Non Profit Center LaSalle
- **Don Kligerman**, Fairmount Ventures

Funder Perspective:

- **Russell Johnson**, North Penn Community Health Foundation
- **Shawn Mooring**, The Philadelphia Foundation

Outcomes from this session will include:

- A list of concrete considerations that could arm a program officer with interview questions before getting into details of a technical assistance project (e.g. how to identify a learning organization)
- A list of considerations for nonprofit organizations
- Funder-based practices for building capacity with out signing a check

This session is the first in a series of three.

*DVG thanks the **North Penn Community Health Foundation** for hosting this event.*

Family Philanthropy Online Monthly Teleconference:

Partnering with Advisors and Nonprofits for Inspiring and Transformational Impact

DATE: Thursday, May 15, 2008
TIME: 12:00 to 1:30 PM
REGISTER: Online via the DVG Members Area at <https://dvg.verveshare.com/> and click on the *FP Online* Button

- *Are you eager to leverage your whole portfolio's investment and your leadership?*
- *Would you like to be sure the intergenerational transfer of your values and wealth in intentional and specific?*

- *Do you want to learn about new trends worldwide in the legacy and transformative giving field of practice?*
- *Need tips for dialoguing with your advisors and family and community leaders about your giving and legacy gifts ahead?*

This teleconference features **Tracy Gary**, author of the just updated and released workbook for donors called, "*Inspired Philanthropy: Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy*," a widely used book in the donor and legacy education field about how to give strategically. Tracy is an inheritor herself, as well as a nonprofit entrepreneur, who has given away over \$2 million of her own money and multi-millions with others. She is now working on her 18th nonprofit start up, called Inspired Legacies and over the years has helped more than 3,000 donor families. Join us to hear about initiatives that Tracy is part of, such as Women Moving Millions, and be inspired to give just as boldly and strategically as Tracy has done for over 40 years.

Pennsylvania Health Funders Collaborative Convening

DATE: Monday, May 19, 2008
TIME: 9:00 AM to 1:00 PM
LOCATION: The Philadelphia Foundation, 1234 Market Street, Suite 1800, Philadelphia
RSVP: By 5/12 to Christina at christina@dvg.org

In July 2007, the Delaware Valley Grantmakers Health Conversion Foundation Affinity Group met to determine interest in collaborating on projects with potential health benefits throughout the region and possibly the state. All members saw the merit of "thinking regionally and acting locally", given the geographic reach of the participants. This group of funders identified a shared interest in improving access to and effectiveness of both behavioral health and primary care services through promotion of integrated delivery models. This focus has attracted a larger group of health funders, which has led to the formation of the Pennsylvania Health Funders Collaborative (PHFC).

Join us for the first formal meeting of the PHFC. The principal topics on the agenda will be:

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- Behavioral/Primary Health Integration Initiative presented by Joe Pyle of the Thomas Scattergood Behavioral Health Foundation
- Pennsylvania Fluoride Advocacy Project presented by Russ Johnson of the North Penn Community Health Foundation
- Pennsylvania Medicaid Policy Institute Update presented by Frazierita Klasen of the Pew Charitable Trusts

Attendees will have the opportunity to join the PHFC at the meeting, or can request the charter prior to the meeting by contacting Christina Edleman. * *You do not need to be a member of the PHFC to attend.*

DVG thanks **The Philadelphia Foundation** for hosting this event.

Webinar: New Media and Philanthropy: How Foundations are Using Web 2.0 and Beyond

Offered in partnership with our colleagues at the Donors Forum of South Florida

DATE: Wednesday, May 21, 2008
 TIME: 1:00 to 2:15 PM
 COST: \$40/person
 FORMAT: Webinar (PowerPoint/video via Internet and accompanying conference call)
 RSVP: By 5/16 to Christina at christina@dvg.org or 215-790-9700 x3

Wikis, blogs, podcasts, social-networking sites including myspace.com and LinkedIn, interactive

gaming and even fictional digital worlds such as SecondLife.com -- they are all quickly affecting philanthropy.

Learn about these new media technologies and how they are becoming an important tool for funders to understand and utilize in their grantmaking. We will also be presenting case studies by the Robert Wood Johnson Foundation and the John S. and James L. Knight Foundation demonstrating how they are using these new technologies to advance issue-specific grantmaking.

PRESENTERS:

Nora Paul, University of Minnesota

Nora Paul is Director of the Institute for New Media Studies at the University of Minnesota, a center for creation, innovation, and examination of content and messages and the effects of new media technologies.

Chinwe Onyekere, Robert Wood Johnson Foundation

Chinwe Onyekere is a Program Officer on the Pioneer Portfolio at the Robert Wood Johnson Foundation. Her responsibilities include work on "Health Games Research," an \$8.25 million initiative that funds research to enhance the quality and impact of interactive games that are used to improve health.

Gary Kebbel, John S. and James L. Knight Foundation

Gary Kebbel is Knight's Journalism Program Director. In this capacity, he is responsible for Knight's News Challenge, a \$25 million contest that awards grants worldwide for new ideas that use digital innovation to transform community news.

June 2008

Establishing a New Strategic Community Relations Program

Presented by DVG's Corporate Donors Forum

DATE: Thursday, June 5, 2008
 TIME: 9:00 to 11:00 AM
 LOCATION: Independence Blue Cross, G. Fred DiBona Jr. Building, 1901 Market Street, Conference Room 23 A (23rd floor), Philadelphia
 RSVP: By 6/3 to Christina at christina@dvg.org or 215-790-9700 x3

Since opening in 1973, Commerce Bank has always been committed to the community it serves. Although Commerce Bank had a large corporate giving program with signature programs, it became clear as the bank continued its fast-paced expansion, that despite the program's generous resources and expansion of outreach initiatives, the program lacked a strategic focus, thus limiting the bank's real ability to address community needs. Therefore, the Community Relations team decided to hire a third party to help them
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develop a strategic corporate citizenship program that aligns with business goals, generates measurable goals for the community and corporate bottom line, and meets employee interests.

Join **Paula Wengerd, the Vice President of Community Relations of Commerce Bank** to hear about the process she went through to restructure Commerce Bank's giving program. *DVG thanks the **Independence Blue Cross** for hosting this event.*

“But They Looked So Good on Paper...” – Reviewing Nonprofit Financial Statements and More

DATE: Wednesday, June 11, 2008
TIME: 9:00 to 11:00 AM
LOCATION: Connelly Foundation, One Tower Bridge, Suite 1450, 100 Front Street, West Conshohocken, PA
RSVP: For planning purposes, you must register by June 3 to Christina at christina@dvg.org or 215-790-9700 x3.

How well do you understand nonprofit financial statements? Do your grantees look financially “fit”? Can you identify problem areas and provide technical assistance? As grantmakers, you must strive to make the most informed decisions possible. To that end, we hope this session will equip you with the tools necessary to recognize the financial health and stability of your grantees.

Join **Lawrence T. Mangan, President, LTM Consulting Group, LLC** as he answers these questions and more. With over 19 years of experience as the chief financial officer for private foundations, including the Connelly Foundation and independent schools, Larry has overseen a large, sophisticated investment portfolio, with substantial allocations to alternative assets, and grant, administrative, operating and capital budgets in the hundreds of millions of dollars.

*DVG thanks the **Connelly Foundation** for hosting this event.*

Growing Opportunities: Will Funding Follow the Rise in Foundation Assets and Growth of AAPI Populations?

DATE: Wednesday, June 18, 2008
TIME: 10:00 AM to 12:00 PM (*Lunch served afterwards for those who want to stay and mingle!*)
LOCATION: Wachovia, 123 S. Broad Street, 5th Floor Board Room, Philadelphia
RSVP: By 6/9 to Christina at christina@dvg.org or 215-790-9700 x3

Asian American and Pacific Islanders are among one of the fastest growing populations in our nation, yet foundation giving to these communities has not kept pace. Be part of an honest dialogue among funders and representatives from the community about the continued disparate giving to AAPI communities, and the need for new strategies to change the dynamic. Asian Americans/Pacific Islanders in Philanthropy (AAPIP) will present findings from *Growing Opportunities: Will Funding Follow the Rise in Foundation Assets and Growth of AAPI Populations?* This report examines the country's top 20 national foundations' (including the Charles Stewart Mott Foundation, The Rockefeller Foundation, and the John S. and James L. Knight Foundation) grantmaking between 1990 and 2002 to AAPI communities. The briefing will also highlight the regional giving trends and growth of the AAPI community in the Philadelphia region.

Presenters:

- Peggy Saika, Executive Director, Asian Americans/Pacific Islanders in Philanthropy (AAPIP)
- Joe Lucero, Research Consultant, Asian Americans/Pacific Islanders in Philanthropy (AAPIP)

Panelists:

- Helen Cunningham, Executive Director, Samuel S. Fels Fund
- Gayle Isa, Executive Director, Asian Arts Initiative

After the program, you are invited to stay for a special lunch generously sponsored by The Philadelphia Foundation from 12:00 PM to 1:00 PM to network with leaders from the AAPI nonprofit community.

The program will be repeated in the afternoon from 1:00 to 3:00 PM for nonprofit leaders in the AAPI community.

AAPIP and DVG thank The Philadelphia Foundation and Wachovia for their generous support of this program.

DVG Arts Funders Roundtable and Brown Bag Lunch

DATE: Wednesday, June 25, 2008
TIME: 12:00 noon to 1:30 PM
LOCATION: The Independence Foundation,
Offices at the Bellevue, 200 South
Broad Street Suite 1101,
Philadelphia
RSVP: By 6/20 to Christina at
christina@dvg.org or by calling
215-790-9700 x3.

Join your colleagues for this informal roundtable discussion about the state of arts and culture funding in our region. Please come prepared to share updates on your organization's work, your thoughts on current issues and contribute your own topics for discussion.

*DVG thanks the **Independence Foundation** for hosting this event.*
