Giving Wisely: Practical Steps to Make the Most of Your Charitable Dollars

Instructor: Christine Sherry

Course Date: Saturday November 1, 2014
No credit or grade offered
10:00 am – 4:00 pm

Outline of the Day (Draft)

Morning session one:
- How the field of philanthropy is changing and emerging trends
- Review of the changing face of the nonprofit sector
- Introduction to key resources in the field

Morning session two: evaluating different kinds of philanthropic strategies
- The difference between charity and philanthropy
- Case studies of different kinds of philanthropic strategies, from direct service to funding research to advocacy to public private partnerships

Working lunch: How to develop a strategy in an area of interest
- How to identify areas of need within a given issue area
- How to find and use experts and learn what others are funding
- Case studies on carving out a niche area for funding where dollars have maximum impact

Afternoon session one: Choosing organizations and projects to fund
- How to assess groups and programs worth funding.
- How to evaluate different organizations in a given field
- Best practices in due diligence

Afternoon session two: Evaluating your impact and setting a course
- Evaluating your impact and those of the groups you support
- Setting a course going forward: interactive workshop

Conclusion and wrap up

Recommended Reading Assignment

Tierney and Fleishman, Give Smart: Philanthropy that Gets Results (Public Affairs 2011)