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Member Briefing Guidelines and Planning Tips Fall 2005

Is there a topic you'd like to explore in depth with other grantmakers? Would you like to bring GFE programming to your community? Take charge of your professional development by organizing a member briefing.

GFE member briefings are an opportunity for you to create the programs on the topics you want, the way you want them. They are one-time, one-day (or less) educational sessions designed by members around topics of interest. Member briefings are designed and hosted by GFE members, with professional support from GFE staff.

Member briefings enhance your learning and networking in many ways:

- You define the topic and learning format for the briefing.
- You deepen your ties with other grantmakers by working with at least two other GFE members to sponsor the session.
- You can build a shared knowledge base and ongoing network with grantmakers around the country who are engaged in your topic of interest and identify opportunities for co-funding or other collaborations.
- You can start a dialogue that will continue to inform your grantmaking for years to come.
- You will have the support and experience of GFE's professional staff to help you execute your member briefing, assisting in both content development and logistics.

GFE solicits proposals for member briefings twice each year, with the goal of sponsoring 2-3 briefings throughout the year. Member briefing proposals are reviewed and approved by the GFE Program Committee, which seeks meetings that consider emerging or especially challenging education issues confronting a number of funders. The committee also seeks programs that help attendees become more effective education grantmakers. Member briefings approved by the Program Committee receive design, logistical and marketing support from GFE staff.

A recent example of a member briefing was the February 2005 program, *Philanthropy's Role in Fostering Partnerships: Collaborating with Unions, School Districts and Communities*. A group of grantmakers affiliated with the Working Group on Education Organizing organized the meeting to examine ways that grantmakers can support collaborations between teachers' unions, district administrators and community members to close student achievement gaps. The program organizers developed case studies of two notable collaborations, which were used as a jumping off point for identifying lessons on how funders can facilitate such efforts.

We ask that member briefings avoid designing programs that showcase the work of a single foundation or serve as funding "pitches," but instead provide a diverse and balanced exploration of the issues.

The GFE Program Committee is especially interested in infusing GFE's recently-released *Principles for Effective Education Grantmaking* (available online at <http://www.edfunders.org>) into all GFE programs. We encourage you to review the principles and identify ways that your program proposal can help to explicate one or more of these eight principles.

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Principles for Effective Education Grantmaking

- *Discipline and Focus: In education, where public dollars dwarf private investments, a funder has greater impact when grantmaking is carefully planned and targeted.*
- *Knowledge: Information, ideas and advice from diverse sources, as well as openness to criticism and feedback, can help a funder make wise choices.*
- *Resources Linked to Results: A logic-driven “theory of change” helps a grantmaker think clearly about how specific actions will lead to desired outcomes, thus linking resources with results.*
- *Effective Grantees: A grantmaker is effective only when its grantees are effective. Especially in education, schools and systems lack capacity and grantees (both inside and outside the system) may require deeper support.*
- *Engaged Partners: A funder succeeds by actively engaging its partners— the individuals, institutions and communities connected with an issue— to ensure “ownership” of education problems and their solutions.*
- *Leverage, Influence and Collaboration: The depth and range of problems in education make it difficult to achieve meaningful change in isolation or by funding programs without changing public policies or opinions. A grantmaker is more effective when working with others to mobilize and deploy as many resources as possible in order to advance solutions.*
- *Persistence: The most important problems in education are often the most complex and intractable, and will take time to solve.*
- *Innovation and Constant Learning: Even while acting on the best available information—as in Principle #2—a grantmaker can create new knowledge about ways to promote educational success. Tracking outcomes, understanding costs and identifying what works—and what doesn’t—are essential to helping grantmakers and their partners achieve results.*

How do I organize a briefing?

To submit a proposal, first find at least 2 additional GFE member organizations that are willing to co-sponsor, help plan and attend the briefing. Then, provide answers to the 10 questions indicated in the call for proposals/memo from GFE Program Committee Chair Jay Sherwin, and submit your proposal to GFE by the deadline.

If your program is accepted, you should then:

- Identify a key contact person to work directly with GFE staff.
- Identify a topic that interests you and is likely to interest other funders. Decide on the outcomes you hope to achieve. Consider speakers and formats that can help you reach your learning outcomes and provide opportunities for audience interaction. GFE staff is happy to help brainstorm ideas with you.
- Identify how the program can advance effective education grantmaking practices, referencing GFE’s *Principles for Effective Education Grantmaking*.
- Decide who you want to invite. Briefings should be open to all GFE members, and you may want to extend the invitation to others as well, such as member of your regional association, policymakers or nonprofit/community leaders.
- Attend to the details (either yourself or by working with an event planner/consultant and/or GFE staff). Reserve a venue and arrange for refreshments and audio-visual equipment well in advance. Make sure that all the co-sponsors are clear about speaker honoraria or expense reimbursements. GFE is happy to provide in-kind support for some aspects of the planning (see below), but sponsoring organizations are responsible for all hard costs.
- Promote the event. GFE will help you get the word out through our website, newsletter and listserv to maximize attendance. GFE can also track the RSVPs, provide a list of attendees, make nametags, and develop an evaluation form if you wish.

- Make sure the speakers are clear about the goals of the briefing, nature of the audience, and logistics of the session – put it in writing. Also, you'll want to ensure that grantseeker presenters understand that this is not a fund-raising opportunity, although they are welcome to talk about their organizations in the context of the conversation.
- After the briefing, we would also like to hear your assessment of how it went, and to see any evaluation forms. The information collected assists GFE in its program delivery.

How can GFE staff help me?

GFE staff can help you by:

- identifying ideas for topics and speakers for the member briefing with sponsors; we can also help you brainstorm a format for the session that will deliver your objectives.
- providing feedback about the timing of the member briefing to ensure the program is relevant and not duplicative of recent or future events.
- promoting the member briefing on the GFE website, through our listserv, and (if time allows) in the GFE newsletter.
- providing sample planning materials, including an announcement; speaker confirmation and thank you letters; and evaluation forms.
- providing a contact list of funders in the region, and sending an announcement to GFE members via e-mail.
- collecting RSVPs, creating an attendance list and supplying nametags.
- serving as fiscal agents for work that is contracted out to writers, event planners, etc.
- attending briefings whenever possible (travel budgets may preclude on-site participation).

GFE can provide these basic forms of support to members at no cost. Members who need more active event management assistance (such as securing a location, recruiting speakers, developing an agenda, generating and mailing invitations, coordinating on-site logistics) may need to provide additional resources to cover expenses and staff time and/or to hire a separate event planner/consultant.

Helpful tips for planning a briefing:

- Plan your session by thinking about the goals of the briefing, and return to them often.
- Link your program to GFE's new *Principles for Effective Education Grantmaking*, considering ways your program can help education funders become more proficient.
- Consider program formats that encourage dialogue and audience participation, and leave unstructured time for networking. Be sure to identify ways to help people get to know one another and make connections.
- Brief speakers about your goals, time allotted for their presentations, the audience and the level of formality of the session.
- Develop a detailed agenda for the event to ensure that you've accounted for everything and that you've left enough time for questions and discussion.
- Provide all relative information in the program announcement including starting and ending times and whether space is limited.
- Identify other topical resources that would be helpful for your audience and consider providing additional handouts or continuing to facilitate an online discussion on GFE's Knowledge Center (our new knowledge management system goes online in fall 2005).
- Think about ways to document information from the member briefing for members who are unable to attend. The GFE newsletter and website are both useful ways to reach the membership.

