



**Fund the
People**

Sausalito, CA
June 28-30, 2017

Funder Retreat

*Bridging the Chasm:
Sustaining Grantee Leaders in the Trump Era*

Objectives: Participants will...

- Exchange experiences, ideas, challenges, and effective models for investing in the workforce of grantee organizations
- Understand Fund the People's framework for investing in grantee talent, including how talent-investment leads to increased equity, performance, impact, and sustainability
- Be able to apply new resources to integrate talent-investing into their ongoing work

Format: More intimate than a conference and more content-rich than a team-building retreat, Fund the People's unique professional development experience will feature both networking and substantial content. The convening will be professionally facilitated by Jessica Bearman. It will be highly participatory; use various formats for different types of learners and participants; and will draw from the experiences and perspectives of all participants and special guests.

Agenda: This high-level agenda describes the major topics of the Funder Retreat. It is subject to change based on the needs and interests of participants.

Day 1 – June 28 (3:30 pm – Dinner)

Why “Fund the People”?

- Opening: Welcome and framing, group introductions
- Why Fund the People? We'll share perspectives and underlying assumptions about why talent investment is critical and why it matters in creating an inclusive, high-performing, and sustainable nonprofit workforce.
- Networking Dinner

Day 2: June 29 (8:00 am – Dinner)

New Perspectives and Frameworks for Talent-Investing

- Nonprofit Voices on Talent-Investing. Nonprofit leaders representing local, regional and national organizations, will share perspectives and experiences that illustrate the value, challenges, and promising practices of investing in nonprofit professionals and teams. Speakers include representation from Chicago's Spanish Coalition for Housing, Hillel International, and the Bay Area-based Women's Community Clinic.
- Talent Investing for Equity and Effectiveness. This session will tap into the experience of several colleagues organizations, including the Bay Area Justice Funders Network, National Committee for Responsive Philanthropy, and California Philanthropy's Full Costs Project to explore how investing in the nonprofit workforce can advance organizational performance, equity and inclusion, and social justice.
- Bake it in. We will dig into Fund the People's framework for integrating investment in nonprofit talent into all types of foundation strategy and grantmaking practices.
- Building Trust, Understanding Need and Readiness. How do we build a relationship between funders and nonprofits with enough trust that we can have honest conversations about talent issues and needs? What does it take?
- Stories from the Field. Throughout our time together, we will hear stories from funders and their nonprofit partners about building trust, understanding need, models for investing in grantee talent, and methods for understanding the impact of this work.
- Networking Dinner

Day 3: June 30 (8:00 am – 2:00 pm)

Making the Case and Spreading the Word

- Myth Busting: We will look at compelling messages, useful data, and strategic communication designed to create a compelling case for talent investment.
- Peer Exchange: Open space to learn from and share on topics of interest and urgency.
- Action Planning. Structured time to consider next steps in developing, refining, or revamping your own, customized approach to talent-investment.

Participating Foundations (List in Development): We anticipate participation from diverse types of foundations, geographic locations, and issue focus areas. So far the following foundations will be represented at the Funder Retreat: Bush Foundation, Robert Sterling Clark Foundation, Evelyn & Walter Haas, Jr. Fund, Heising-Simons Foundation, Jim Joseph Foundation, David and Lucile Packard Foundation, Charles and Lynn Schusterman Family Foundation, Vitalyst Health Foundation, Raymond John Wean Foundation, B. Robert Williamson Jr. Foundation