

**REPORT ON THE  
2018 GRASSROOTS GRANTEE CONVENING**

**OF THE  
NORTHERN CALIFORNIA ENVIRONMENTAL GRASSROOTS FUND  
AND CALIFORNIA WILDLANDS GRASSROOTS FUND**

Held on November 15, 2018

At the Oakland First Unitarian Church  
Oakland, CA

**Funding for Grassroots Groups**

The 13<sup>th</sup> annual convening of grantees of the California Wildlands Grassroots Fund and the Northern California Environmental Grassroots Fund was held at the First Unitarian Church. Altogether 78 attendees (60 of which were grantees) attended the convening.

Although the amount of grantees registered was on par with previous years, our attendee count was lower because a handful of registrants were unable to make the Convening due to the unhealthy air quality caused by the devastating California wildfires.

This year, the training consisted of a variety of panelists from different organizations. In the spirit of the fundraising theme, the Reality Grantmaking Panel was re-introduced and proved to be an outstanding resource to attendees. Panelists included program officers from the Leonardo DiCaprio Foundation, The 11<sup>th</sup> Hour Project, and the Lisa & Douglas Goldman Fund. Laura Bergman from the Foundation Center introduced grant-seeking resources; Francisco Martinez of Bank of the West spoke about donor advised funds; author and nonprofit consultant Dalya Massachi led a 2-part crash course on grantwriting; and California Wildlands program officers Cathy Lerza and Megan Mubarak led a panel on how to craft budgets that further grassroots organizations' missions.

**Evaluation**

Similarly to the 2017 convening, we opted to collect evaluations in-person at the end of the convening.

In total, we received 53 evaluations, which amounts to approximately 88% of the grantees in attendance. This number is up substantially compared to the 51% response

rate in 2017 and 63% response rate received in 2016. This high response rate allowed us to more deeply analyze the impact of the convening, and we hope that the response rate remains this high at future convenings.

In total, 74% of all evaluation respondents reported this is the first convening that they have attended. This statistic is particularly exciting because it demonstrates the success of the Rose Foundation's event outreach and the enthusiasm of our new grassroots grantees.

### Overall Assessment

Of those who completed the evaluation, 91% said that the convening was "Extremely" or "Very" Useful (compared to 83% in 2017 and 89% in 2016). 89% of grantees reported that the convening served as a "Great" or "Good" opportunity to network.

### Selected quotes from what respondents liked best about the Convening:

*I loved the "peek behind the curtain" grantmaking session. It was so insightful to see into the process of funding grants.*

*The chance to learn from program officers about better ways to write grants was great. It's like learning from a schoolteacher on how to write a paper that they later grade!*

*The morning panel was incredibly helpful, learning the different perspectives and building a solid list of useful tips. Great topic this year!*

*All of the networking and online resources are at our fingertips! I also liked the access to trainers, and the interactive practice phone call in Dalya's session.*

*I appreciate the network, authenticity of support, and building a connection between the foundation and the grantee. The topic and tools were very relevant.*

*I liked feeling the community of other grassroots environmental groups and learning what funders want to know.*

### Selected quotes from what respondents liked least about the Convening:

*I had to leave at 4:45, so I missed the networking reception after the workshops. Maybe there should be another networking opportunity in the morning where we could introduce ourselves, etc.*

*Not sure about most folks' backgrounds but speaking from the perspective of someone who moves a lot in their daily life, sitting for 7+ hours was difficult and most any afternoon session will need to accommodate the after-lunch lull.*

*This was my first convening and it may be that in other years, the workshops had a more varied focus. It would have been more useful to have one workshop option that was about another dimension of nonprofit administration/fundraising, such as accounting.*

*I would have liked smaller breakout groups for better conversations.*

*The panel was interesting, however, there seemed to be a bit of separation between funders and grantees in terms of accessibility. This seemed to reinforce funding silos.*

*I liked everything, but panelists could have been more interactive and humorous to keep the attendees excited.*

#### Assessment of individual sessions

Note: Some respondents left evaluations for some segments of the training blank, due to the schedule.

#### **Meet the Money:** Reality Grantmaking Panel

Based on the evaluations, this workshop was one of the most valuable sessions to the grantees. 86% reported that this workshop was “extremely useful”, and 98% of grantees rated this section as “extremely” or “very useful”. Tara Dettmar of Tolowa Dunes Stewards commented, *“This was an incredibly useful panel. The content, the trainers, everything. I especially enjoyed the diversity of opinions which helped to drive home the importance of establishing relationships with funders.”*

#### **A Map to the Money:** *How to use Foundation Directory Online and other Grantseeking Tools*

Presented by Laura Bergman

86% of grantees rated this section as either “extremely” or “very useful”. Although over half of grantees rated the section as “extremely useful”, some grantees commented that the workshop’s technical difficulties and lack of interactivity brought their rating down.

#### **Where’s the Money Hiding?** *How to Find and Approach the Fastest-Growing sector in Philanthropy – Donor Advised Funds*

Presented by Francisco Martinez

91% of grantees rated this section as either “extremely” or “very useful”. While a handful of grantees commented that the session was a good overview of a complicated issue, some commented that the content made them feel disheartened due to the overall inaccessibility of donor advised funds.

**Connecting Money and Purpose: *How to Make the Budgets and Financials Work for YOU***

Presented by Megan Mubarak, Cathy Lerza

75% of grantees rated this section as “extremely useful”, and 25% rated it as “very useful”. Grantees noted that they really appreciated the panelist’s responsiveness to their questions and the dynamic brainstorming.

**Connecting to the Money: *Writing like Your Grant Depended on it***

Presented by Dalya Massachi

96% of grantees rated this section as either “extremely” or “very useful”. Many attendees commented that they enjoyed the workshop’s interactive role-playing, and would love to experience more activities like that at future convenings.

**Future Convening Topics**

The grantees offered a diverse array of responses to this section. Repeated responses were related to social media use and exposure, as well as how to create a sustainable grassroots organization that operates beyond the presence of the founder. Some grantees commented that they would like to experience a longer, potentially multi-day conference in order to attend all of the workshops offered.