

Guidelines for Planning a Members Briefing

Overview/Description

Philanthropy New York cultivates a spirit of learning, and our 150+ programs annually foster an open environment for discussion and debate among funders. The strategic goals of our programs are:

- To support the professional development of philanthropic staff
- To build institutional skills and knowledge and engage members in discussions about topics key to effective philanthropy
- To expose funders to new trends, initiatives and collaboratives

Through **Members Briefings**, groups of members may have the opportunity to initiate and produce issues-related programming that offers funders throughout the region additional opportunities to learn from one another and from distinguished leaders and resource persons outside the funding community.

Members Briefings proposals can be submitted year-round and will require final approval from Philanthropy New York, who can help to determine 1) Whether Philanthropy New York is the right partner and/or venue; 2) If Philanthropy New York members are the right audience; and 3) If neither of the first two, then help to identify the right partner(s)/venue.

Any group of three (3) or more member organizations can present a Members Briefing proposal. The briefings are **intended to be educational in nature and *not* a forum to highlight or raise money** for a particular organization or project. We request that the briefings be free-of-charge and open to our members and other funders. When submitting a Members Briefing proposal, please also consider the aforementioned strategic goals of Philanthropy New York programs.

If the Members Briefing is approved, **Philanthropy New York's role** is to provide at your request:

- **Consulting** in planning the briefing
- **Publicity, registration, and other logistical support** as detailed in these guidelines
- **Subject to availability, a Philanthropy New York conference room** to seat a maximum of 75 persons

The Role of the Sponsors

Before the briefing

- **Three co-sponsors.** Three member organizations must agree to co-sponsor the briefing and identify the grantmaker responsible for organizing it. Additionally, other funders and affinity groups are welcome to co-sponsor and provide additional publicity. Including Philanthropy New York Peer Networks or other affinity groups early in the planning process can provide expanded publicity and support for your briefing and is highly recommended.
- **Eight-week lead time.** Discuss the session with our staff (see *Preliminary Plan below*) at least eight (8) weeks in advance, reserving the date – and the Philanthropy New York conference room, if desired – so as not to conflict with other funder events.

- **Arranging for the site, equipment and refreshments.** Arrange for the location (the Philanthropy New York conference room or other venue) and food. If you wish, our staff may be able to help you identify a suitable caterer and an accessible space other than Philanthropy New York. Also arrange well in advance for any audio-visual equipment or special needs arrangements. We can provide upon request audio/visual conference tech.
- **Costs of the briefing.** The sponsors are responsible for all costs associated with the briefing.
- **Preliminary Plan.** To help us keep track of your program and to start putting program components in place, please submit a completed [Preliminary Plan form](#) as soon as possible.
- **Publicity.** Provide us with a description of the briefing to serve as the core publicity for:
 - The Philanthropy New York website
 - The monthly Calendar of Events
 - The weekly Events Digest

You should feel free to do additional publicity on your own, and you are encouraged to arrange for press coverage (our Communications staff may be able to help). **In our experience, the bulk of registrations often come in during the week prior to the event. However, if early registration seems low, you may want to conduct additional outreach by phone or email.**

- **Informing the speakers about the briefing.** Inform the speakers (and any additional resource people that you invite) in writing, as well as orally, about the goals of the briefing, the nature of the audience and the logistics of the session. A planning call is useful to get everyone aligned, and Philanthropy New York's Learning Services staff can set up the call and take part, providing general information about briefing formats, what has worked well in the past, size and make-up of audience, publicity, etc.

Representatives from nonprofit organizations should be alerted that this is not a fundraising session, though they are welcome to bring material about their programs and talk about their organization in the context of the briefing. There should also be clear communication regarding any honorarium or expense reimbursement.

- **Nonprofit and government speakers.** In addition to nonprofits, appropriate government officials can also be invited to speak. We may be able to assist in identifying them.
- **You are free to invite guests other than funders.** If you so decide, nonprofit and government agency representatives can also be invited as audience members – for their own information and to enrich audience discussion. *Our members generally expect that the audience will consist of funders only, so if non-funders are invited, the publicity should include a note to that effect.*

- **Roster and security list information.** Provide us with the names and contact information (title, organization, address, phone and email) of everyone to be included on the security list and roster: sponsors, organizers, speakers, special guests, etc.
- **Registration, nametags and roster.** Decide who will take the RSVPs, provide a list of the attendees and prepare stick-on nametags. We will be happy to take care of these tasks.
- **Resource materials.** You can enhance the value of the briefing by distributing background materials (articles, a resource list that includes books, website addresses, etc.). These will need to be reviewed by Philanthropy New York staff, as per the non-solicitation policy, and will require approval. Regarding PowerPoint presentations, the speaker can decide whether or not the slides should be shared on the website ahead of time.

At the briefing

- **A person in charge.** Delegate a moderator or one of the speakers to be in charge of running the session, including: starting the briefing, introducing and thanking the resource people and the event's organizers, keeping speakers on schedule, and facilitating the conversation and questions. The person in charge should also make sure the session ends on time, to respect the audience's schedules. We ask that the speaker, when introducing the program, acknowledges Philanthropy New York. We also welcome the speakers to encourage members to create their own briefings.
- **A person to welcome registrants.** Determine who will check people through security, welcome registrants and distribute nametags, rosters and other materials. If the briefing is held at Philanthropy New York, the staff will take care of these tasks.

After the briefing

- **If the session was not held at Philanthropy New York, please report back to us.** We would appreciate knowing how the session went, who actually attended (versus who registered), and whether there will be any follow-up activities. Please provide us with any handouts (including evaluation) and briefing minutes.
- **Give us your feedback regarding the Members Briefing process.** Your comments and suggestions are welcome and can be directed to Yi-Ching Lin, Director of Learning Services, at ylin@philanthropynewyork.org.

For more information about Members Briefings and other programming opportunities, contact Yi-Ching Lin, Director of Learning Services, 212-714-0699, ext. 210, ylin@philanthropynewyork.org.