

SUPPORT CENTER FOR NONPROFIT MANAGEMENT

CONSULTING ■ TRANSITION MANAGEMENT ■ TRAINING
for nonprofit & philanthropic organizations

Meet the **CORPORATE** Grantmakers

Friday, December 11, 2009
8:30 AM - 12:00 PM
Rutgers, New Jersey

Phone: 212-924-6744
Fax: 212-924-9544
www.supportcenteronline.org
www.executiveleadership.org

New York Office:
305 Seventh Avenue
@ 27th Street
11th Floor
New York, NY 10001-6008

New Jersey Office:
185 West State Street
New Jersey State Library
Trenton, NJ 08625-1101
Phone: 609-278-0482

SCHEDULE

- 8:30-9:00** Registration
- 9:00** Welcome:
Don Crocker, Executive Director,
Support Center for Nonprofit Management
- 9:10-10:30** Panel Discussion, Moderated by Mark Valli
- 10:30-10:45** Break
- 10:45-12:00** Panel Discussion and Audience Q&A Continues
- 12:00** Session Ends

PANELISTS QUESTIONS

1. How do you evaluate the performance of your grantees? And how do you evaluate the success of your own programs?
2. Many smaller nonprofits often feel that funders overlook them in favor of larger organizations. What can a smaller organization do to pique your interest?
3. For those of you who do not accept unsolicited proposals, how can grant seekers increase their chances of being invited to submit a proposal? What are some of the best ways to approach and build a relationship with you or another foundation? Are there things that a nonprofit should avoid doing?
4. If you are not able to provide funding, can a nonprofit make a request for an in-kind donation or volunteer support for a project? If your company has an employee volunteer program, please speak about how nonprofits should request help.
5. Does your company sponsor special events? Would sponsorship requests be approved by you/corporate foundation or by another department (e.g. marketing, public relations)?
6. To what extent does your corporation encourage employees to sit on local nonprofit boards? Do you have a system in place to receive and process feedback from employees who do so? How does this affect your giving strategies?
7. What, specifically, have agencies “done right” when seeking your support? What makes a proposal stand out? And, on the flipside, what are some of the most common mistakes that nonprofits make?
8. If you could convey one “take-home message” to help nonprofits better understand the challenges faced by funders in today’s economic environment, what would it be?

MARK VALLI

President, New Jersey After 3

ADDRESS & PHONE: 391 George Street,
New Brunswick, NJ 08901
732-246-7902



HOW BEST TO CONTACT: mvalli@njafter3.org

INTERESTS:

(e.g., Fields of interest, areas funded, types of support or service, geographic region, exclusions, etc.)

New Jersey After 3, Inc. is a private, non-profit organization dedicated to expanding and improving afterschool opportunities for New Jersey's families. NJ After 3 partners with local organizations and public schools to support student learning and expand learning time through evidence-based after-school programs for students in grades K-8.

In response to critical community challenges throughout the state,
New Jersey After 3 provides the following public supports: It

- 1) keeps children safe and constructively engaged between the hours of 3pm and 6pm;
- 2) Expands student learning time and improves student achievement;
- 3) Promotes positive youth development, including the areas of service learning, health and art;
- 4) Supports working families by alleviating childcare concerns so that parents and guardians will find and retain full-time jobs.

CONTRIBUTIONS/SERVICE SUMMARY:

(e.g., 2008 disbursements, average grant size or range, summary of technical assistance etc.)

NJ After 3 provides training, technical assistance, content, and general operating grants of over \$10,000,000 to a statewide network of nonprofit agency partners who implement our research based program model in public schools. These programs currently serve more than 12,000 children and families throughout more than 100 urban, rural and suburban communities. For organizations interested in applying for funding through NJ After 3, please sign up at our website www.njafter3.org.

New Jersey After 3 Continued.....

PANELIST BIOGRAPHICAL INFORMATION:

Mark Valli is the founding President & CEO of New Jersey After 3, Inc. – the nation's first statewide public/private partnership created to expand and improve afterschool opportunities. Currently New Jersey After 3 provides an evidence-based network of afterschool programs to 12,000 students in over 110 schools across New Jersey.

Currently Mark serves on several Boards and Commissions: He Chairs the New Jersey Center for Nonprofit Corporations; serves on the Board of Leadership New Jersey Graduate Organization; serves on the New Jersey Crime Prevention Coordinating Council; serves on the Steering Committee of the New Jersey Afterschool Network; serves on the New Jersey Council of Education Equity and Diversity; and serves on the Advisory Board of the Capital One Community Renewal Fund.

Mark was most recently recognized:

- As a recipient of the 2009 New Jersey Child Assault Prevention (NJ CAP) Award
- With a Distinguished Service Award by Child Development Center (2008)
- As one of New Jersey's 40 Top Business Leaders Under 40, by NJBiz (2007),
- By the Five Sector Alliance with a 2007 Lifetime Achievement Award for the extraordinary role he plays in New Jersey's Education Sector (2007).

Previously Mark served as Vice President of New Jersey Community Development Corporation (NJCDC). During his five year tenure with NJCDC, he was responsible for corporate and foundation outreach, representing the agency at various public events, and coordinating efforts with other organizations on various state-wide initiatives.

Before joining NJCDC, Mark spent six years as one of two founding staff people with the New Jersey Commission on National & Community Service. The State Commission is responsible for funding the state's AmeriCorps programs, which have provided over 2,000,000 hours of structured and supervised community service.

Mark also spent 2 years working for a management consulting firm that specialized in non-profit facilities and energy management.

Mark holds a Masters in Public Administration at Rutgers University and graduated Phi Alpha Alpha. Mark previously graduated from Swarthmore College with honors in history and political science.

ETTA DENK

Sr. Vice President, Market Manager
Bank of America



ADDRESS & PHONE: 750 Walnut Avenue
Cranford, NJ 07016
908-709-6050

HOW BEST TO CONTACT: Etta.r.denk@bankofamerica.com

INTERESTS:

(e.g., Fields of interest, areas funded, types of support or service, geographic region, exclusions, etc.)

2009 Local Foundation Giving Focus Areas

COMMUNITY DEVELOPMENT/NEIGHBORHOOD PRESERVATION

- Supporting organizations that help to ensure that low-income residents of NJ have the opportunity to access safe, decent affordable housing. Specific funding opportunities include: home buyer education, foreclosure prevention activities, neighborhood stabilization, affordable housing development, supportive housing.
- Supporting organizations that help to ensure that low-income residents of NJ have the opportunity to achieve self-sufficiency. Specific funding opportunities include: workforce development programs that help individuals train for higher skill level jobs, workforce development programs that promote green job training, and programs that address sectoral workforce development needs.

EDUCATION

- Supporting organizations that help to ensure that low-income youth of NJ have the opportunity to obtain a quality education and achieve academic success. Specific funding opportunities include: early childhood development organizations / programs that focus on helping children enter kindergarten successfully, k-12 initiatives that specifically address academic attainment, dropout prevention programs, and after school programs that have a direct connection with the school in response to academic achievement. In order to be considered, programs should operate for the duration of the school year.

ARTS AND CULTURE

- Supporting organizations that contribute to the vitality of neighborhoods through cultural enrichment opportunities. Specific funding opportunities include: access to arts in under-served communities, arts education for youth in areas where the public education system does not provide, and cultural experiences that enhance community involvement. Support of exhibits will be considered on a case-by-case basis. In order to be considered, arts education programs should operate for the duration of the school year.

CONTRIBUTIONS/SERVICE SUMMARY:

(e.g., 2008 disbursements, average grant size or range, summary of technical assistance etc.)

Grants in 2009: Approximately \$3 million awarded to 150 organizations

Average grant: Approximately \$15,000

PANELIST BIOGRAPHICAL INFORMATION:**Etta Denk**

- 18 years with JPMorgan Chase in community development, community relations, philanthropy
- 2 years with Bank of America in philanthropy, sponsorships, community development services, volunteerism
- Board service includes: Bergen County WIB, Paterson Restoration Corp., Housing & Community Development Network, Project Live

ELLIOTT D. LEE

Vice President-New Jersey
JPMorgan Chase Foundation

The logo for JPMorgan Chase & Co. is displayed in white serif font on a dark blue rectangular background.

ADDRESS & PHONE: 483 Bloomfield Ave, Fl.2
Montclair, NJ 07042
973-783-8267

HOW BEST TO CONTACT: elliott.d.lee@chase.com

INTERESTS:

(e.g., Fields of interest, areas funded, types of support or service, geographic region, exclusions, etc.)

Community Revitalization, focusing on the areas of Community Development, Pre-k-12 Public School Education, and Arts and Culture. Target geographic areas: northern half of the state with particular focus on Orange and Paterson.

CONTRIBUTIONS/SERVICE SUMMARY:

(e.g., 2008 disbursements, average grant size or range, summary of technical assistance etc.)

2008 grants in NJ: \$1.3 million
Grant range: \$10,000 to \$110,000
Make TA grants

PANELIST BIOGRAPHICAL INFORMATION:

Elliott D. Lee is Vice President-New Jersey, for the JPMorgan Chase Foundation. Before joining the foundation in June, 2008, he was Deputy Executive Director of Community Training and Assistance Center (CTAC), a Boston-based national nonprofit consultancy that provides technical assistance to community-based organizations and to large urban school districts seeking to improve student learning and achievement.

Elliott has devoted most of the last 21 years to work in the field of philanthropy. From 2001-2006, he was a Program Director at the Geraldine R. Dodge Foundation, which funds arts, education and environment programs across New Jersey. Before that, Elliott served a total of seven years as a program officer for the Victoria Foundation, which supports a wide range of educational, youth and community development programs in Newark, NJ. From 1996 to 1998, Elliott took time away from his foundation work to run the Center for Non-Profit Corporations. In the late 1980s, he was Director of Public Affairs at Local Initiatives Support Corporation.

Prior to his work in the non-profit sector, Elliott was a journalist for 10 years, first as a researcher-reporter at *Newsweek Magazine*, then as associate and then managing editor of *Black Enterprise Magazine*, and finally as an editor and reporter for six years at *The Wall Street Journal*. In 1982-83, Elliott was one of 10 journalists chosen to participate in the Bagehot Fellowship in Business and Economic Journalism program at Columbia University's Graduate School of Journalism.

Elliott, who earned BA and MA degrees from Princeton University, has served on the boards of numerous local, state and national organizations. In addition to his board work, Elliott has volunteered as a group facilitator, most recently for a national third-sector initiative to engage the poorer residents of New Orleans in efforts to redevelop the city.

ELLEN W. LAMBERT

Executive Director, Office of Corporate Philanthropy
Executive Vice President, The Merck Company Foundation



ADDRESS & PHONE: 908-423-2044

HOW BEST TO CONTACT: ellen_lambert@merck.com

INTERESTS:

(e.g., Fields of interest, areas funded, types of support or service, geographic region, exclusions, etc.)

Education, health, community programs

CONTRIBUTIONS/SERVICE SUMMARY:

(e.g., 2008 disbursements, average grant size or range, summary of technical assistance etc.)

Grants in 2009: \$52 million

Grants range: \$500-\$10 million

PANELIST BIOGRAPHICAL INFORMATION:

Ellen W. Lambert has primary operational responsibility for the Office of Contributions and The Merck Company Foundation (TMCF), which together provide cash contributions of some \$60 million annually to a wide range of organizations worldwide. Major initiatives supported by TMCF include the African Comprehensive HIV/AIDS Partnership in Botswana, the Merck-China HIV/AIDS Partnership, Merck Vaccines Network – Africa, the Merck Institute of Science Education, the UNCF/Merck Science Initiative, the Merck/AAAS Undergraduate Science Research Program, the Merck Childhood Asthma Network, the Merck Alliance to Reduce Disparities in Diabetes and the Program on Pharmaceutical Policy Issues. The Office of Contributions also manages the Partnership for Giving, Merck blood drives, employee volunteerism activities and (in collaboration with Merck sites) the Neighbor of Choice and Champions for the Environment programs.

Ellen works closely with Merck management and programmatic leadership to ensure alignment of our philanthropic investments with the Company's strategic goals and to create shared value for Merck and for the communities and societies in which we operate. Ellen is also responsible for relationship management with key internal and external partners involved in Merck's cash grantmaking and related corporate responsibility activities, as well as representing Merck on issues related to corporate philanthropy.

Merck Continued.....

PANELIST BIOGRAPHICAL INFORMATION:

Ellen W. Lambert

Ellen has more than 25 years of experience in philanthropy. Before coming to Merck, she was Executive Director, Roche Foundation, and Director, Corporate Relations and Contributions, at Roche, where she managed the U.S. corporate contributions program. Among her accomplishments at Roche were the development of a Web-based grants management tool to streamline grant compliance processes and to coordinate aggregate spending; and the establishment of the Roche Pro Institute, a New Jersey high school student mentor/scholarship program providing urban students opportunities to work year-round with corporate mentors on identifying and developing professional interests and skills.

Before joining Roche, Ellen was Executive Director of the Healthcare Foundation of New Jersey, a \$160 million private foundation with a mission focused on vulnerable populations and the Jewish Community. While at the Healthcare Foundation, she initiated a five-year, \$5 million statewide program supporting neighborhood health centers, which led the way to supporting Federally-qualified health center growth in New Jersey; and developed a \$4.2 million Center for Humanistic Medicine at the New Jersey Medical School, created to change the way medical students learn doctoring. Before moving to the Healthcare Foundation in 1998, Ellen was Executive Director of the Beth Israel Medical Center Foundation in Newark (1997-1998) and held positions of increasing responsibility in community relations and development at Irvington General Hospital, Cerebral Palsy of New Jersey, Seton Hall University, Matheny School and Hospital, and Special Olympics New York. She also served as a corporate bankruptcy attorney at Cole, Schotz, Meisel, Forman & Leonard in Hackensack.

Ms. Lambert has a B.A. from the Newhouse School of Communications at Syracuse University (1973), an M.A.T. from Tulane University in New Orleans (1976) and a J.D. from Seton Hall University School of Law in Newark, New Jersey (1991).

MARION C. O'NEILL
Manager, Corporate Contributions
PSEG and PSEG Foundation



ADDRESS & PHONE: 80 Park Plaza, 10C
Newark, NJ 07102

HOW BEST TO CONTACT: Marion.oneill@pseg.com

Also see the PSEG website for other funding contacts in
Corporate Responsibility, Regional Public Affairs and Urban Development

INTERESTS:

(e.g., Fields of interest, areas funded, types of support or service, geographic region, exclusions, etc.)

Environment, Education and Community and Economic Development where PSEG has business interests

PSEG assigns grants for assessment using location (state or county) and scope (local v statewide)

CONTRIBUTIONS/SERVICE SUMMARY:

(e.g., 2008 disbursements, average grant size or range, summary of technical assistance etc.)

Average grant size is approximately \$6,500 and in 2008 the Foundation and corporation donated over \$8 million.

PANELIST BIOGRAPHICAL INFORMATION:

Marion O'Neill is the Manager—Corporate Contributions for Public Service Enterprise Group, a diversified energy company headquartered in New Jersey and one of the ten largest electric companies in the United States. Its principal subsidiaries are: Public Service Electric and Gas Company, PSEG Power and PSEG Energy Holdings. PSEG's areas of funding include education, the environment, and community and economic development. In addition to managing the Gifts data base, she manages the PSEG Foundation, budgets for each operating company and several corporate budgets, employee programs such as educational matching gift, and power of giving, oversees contributions governance and policy issues, assists in developing philanthropic strategy integrated with corporate operating needs, manages external events for senior management, works to communicate contributions activities through the website, press conferences and other appropriate venues.

Ms. O'Neill began her career at PSEG in governmental affairs and has served as the manager of legislative and regulatory issues for the gas business and manager of legislative issues in the federal affairs department. She worked with trade associations, business colleagues and congressional staff in New Jersey and Washington to develop legislative and regulatory initiatives relevant to business strategy.

Marion holds a B.A. in English from Montclair State College and an MBA from Fairleigh Dickinson University. She serves on the Board of the Newark Day Center, and recently resigned from the Marino Fund and Mount Saint Dominic Academy Boards of Trustees. She is a volunteer with the St. Thomas More Student Television and Notre Dame Church. She has two children, ages 24 and 15.

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What We Do

Support Center is dedicated to improving our society by increasing the effectiveness of the nonprofit sector.

Our services are designed to strengthen nonprofit and philanthropic leaders & their organizations so that they can better serve their clients and communities.

Web: www.supportcenteronline.org | www.executiveleadership.org

Consulting / Coaching

- Strategic Planning
- Board Development & Governance
- Fund Development
- Financial Management
- Fostering Accountability
- Organization Development & HR
- Executive coaching

Executive Transition Management

- Succession Planning
- Transition Planning
- Comprehensive Executive Search
 - > Search, Recruitment, Screening & Hire
- Interim Executive Leadership
- Executive and Board Coaching

Turnaround Services

- Organizational Assessment
- Organization Restructuring Consulting
- Financial Assessment & Recommendations
- Partnership Assessment & Development
- Mergers: Feasibility Analysis & Guidance
- Turnaround & Reinvention Facilitation
- Business Process & Systems Improvement

Grantmaker Services

- Consultation on Grantmaking Strategy & Grantee Effectiveness
- Enhancing Grantee Effectiveness & Performance
- Consulting & Turnaround, Transition Management & Training Services for Grantees

Training / Professional Development

- Professional Development Workshops
- Certificate Programs
- Customized Training & Conference Facilitation
- Meet the Grantmakers Panel Discussion Series

Room Rentals

- Training and conference rooms are available to rent at reasonable prices.

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