

MEMBER-LED BRIEFING GUIDELINES

I. OVERVIEW

Through **Member-Led Briefings**, groups of members may themselves initiate and produce issue-based 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.

Any group of three (3) or more member organizations can present a Member-Led Briefing. 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. Briefings should seek to enrich intellectual discourse on the topic at hand.

San Diego Grantmakers (SDG)'s role is to provide at your request:

- **Consulting** in planning the briefing
- **Publicity, registration, evaluation and other logistical support** as detailed in these guidelines
- **Subject to availability, the SDG conference room** to seat a maximum of 30 persons, or assistance in sourcing another space

II. 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 SDG Collaboratives early in the planning process can provide expanded publicity for your briefing and is highly recommended.**
- **Eight-week lead time.** Discuss the session with our staff at least eight (8) weeks in advance, reserving the date – and the SDG conference room, if desired – so as not to conflict with other events.
- **Arranging for the site, equipment and refreshments.** Arrange for the location (the SDG 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 SDG. Also arrange well in advance for any audio-visual equipment or special needs arrangements. We can provide upon request: a project and screens to be hooked up to your laptop; and audio/visual conference tech.
- **Costs of the briefing.** The sponsors are responsible for all costs associated with the briefing. If this is an issue, please discuss with SDG.
- **Preliminary Plan.** To help us to start putting program components in place, please submit a completed **Planning Form** as soon as possible.
- **Publicity.** Provide us with a description of the briefing at least 4-6 weeks in advance of the program to serve as the core publicity for:
 - The San Diego Grantmakers website
 - The monthly Events Calendar
 - Targeted, tailored social media posts and email communications

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

Please note that we do not do mailings of paper invitations. We will supply at your request a mailing list of our members – in the form of an Excel file or paper labels, with one contact person per organization.

- **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 teleconference is useful in getting everyone aligned, and SDG's Senior Director of Learning and Programs 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.

- **Government speakers.** In addition to nonprofits, appropriate government officials can also be invited to speak. We may be able to assist in identifying them.
- **Registration, nametags and roster.** SDG would be happy to take RSVPs, provide a list of the attendees and prepare stick-on nametags.
- **Resource materials.** You can enhance the value of the briefing by distributing background materials (articles, a resource list that includes books, website addresses, etc.). Information can also be posted ahead of time on our website and highlighted by a follow-up email to attendees after the program. 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 speakers 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. We ask that when introducing the program the welcomer (if not an SDG staff person), acknowledges San Diego Grantmakers and this is a Member-Led Briefing and encourages members to create their own briefings, and welcomes the speakers.
- **A person to welcome registrants.** Determine who will welcome attendees as they arrive. A San Diego Grantmakers staff person can help to do this.

After the briefing

- **Thank you email and evaluation.** SDG typically sends out a thank you email and evaluation. Please let us know if you have any special questions or materials you would like for us to include in this evaluation or email, respectively.
- **If the session was not held at San Diego Grantmakers, please report back to us.** We would greatly 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 briefing minutes.
- **Give us your feedback regarding the Member-Led Briefing process.** Your comments and suggestions are welcome and can be directed to Beeta Jahedi, Senior Director of Learning and Programs.

For more information about Member-Led Briefings and other programming opportunities, contact Beeta Jahedi, Senior Director of Learning and Programs at 858-875-3336 or beeta@sdgrantmakers.org.