

# Motivate Your Audience with One of America's Top 25 Philanthropy Speakers



Need an outside expert to enlighten your board or foundation members? How about a provocative, engaging voice at your next big convening? Global philanthropy advisor Kris Putnam-Walkerly, author of *Confident Giving: Sage Advice for Funders* and the acclaimed Philanthropy 411 blog, regularly shares her knowledge and expertise on virtually every aspect of grantmaking with a variety of audiences. Recently named one of America's Top 25 Philanthropy Speakers, Kris has been a featured presenter and trainer for many foundation associations, affinity groups and individual foundation boards. She draws her insights and wisdom from more than a decade in the philanthropic arena, consulting to clients such as the Annie E. Casey Foundation, Robert Wood Johnson Foundation, Cleveland Foundation, and David and Lucile Packard Foundation, as well as myriad smaller foundations and individual philanthropists.

## SAMPLE TOPICS

Kris addresses both timely trends and perennially relevant ideas for philanthropic strategy and practice, all delivered in an entertaining and engaging way to help audiences transform their giving. Her sample topics include:

**Equity: Philanthropy's New Buzz Word or the Key to Achieving your Foundation's Mission?** - Equity is a trending topic in philanthropy, but many foundations are struggling to understand exactly what it means and how to address it. Kris will present the findings of an equity field scan her firm recently completed, and discuss how foundations are incorporating equity into their internal operations. *This session can also include a funder who can share their experience incorporating equity across their internal operations.*

**Poverty, Abundance and Delusional Altruism** - This provocative session will explain how many philanthropists and grantmaking foundations are "delusional" in their altruism, unknowingly operating with a poverty mentality that hinders talent, stalls creativity, and hijacks opportunity for systemic change. By contrast, an abundance approach to charitable giving allows philanthropists to give confidently for maximum impact and dramatic return.

**Transforming Your Philanthropy** - Philanthropic donors and foundations are often unwitting prey to their own waste, bureaucracy, internal policies, lethargy and forgotten common sense. Addressing and correcting these issues - often without incurring any cost - can greatly increase impact and reinvigorate your giving. In this session, Kris shares 5 ways to transform the entire grantmaking operation to create a more rewarding approach for all.

**Learn, Rinse and Repeat: Techniques to Continuously Learn and Improve** - Few philanthropists intentionally learn from their own experiences or build their organizational capacity to be strategic grantmakers. Kris explains learning techniques funders can incorporate into their exiting work, guaranteeing stronger outcomes and better deployment of resources.

**Essential Practices for Effective Grantmaking** - Today's options for effective grantmaking are more varied than ever, including public-private partnerships, social impact investing, program-related investing, crowdfunding and more. However, some basic core practices of grantmaking that should never go out of style. In this session, Kris will share 11 core practices of effective grantmaking and how to develop a structured process that fits your mission, goals, capacity, and style of operating.

**Grantmaking Essentials 2.0 - Smart Practices of Savvy Grantmakers** - So, you've been around your foundation for a while. You've mastered the basics — the essentials you need to create a solid grantmaking strategy and process. How do you take your work and your effectiveness to the next level? It's one thing to be competent; it's another to go beyond the basics and really hone your craft. This session Kris will explain nine smart grantmaking practices that will help you do just that.

**5 Best Practices of Extraordinary Grantmakers** - Extraordinary grantmaking only happens when a foundation's top leaders understand and nurture an environment in which the extraordinary can thrive. In this provocative session specifically for foundation CEOs and trustees, Kris will share key ways to create a culture of innovation, embrace an abundance mentality vs. a poverty mentality, streamline operations, intentionally learn and improve, and collaborate with other funders for impact.

*"Kris is great at making the complex easy to understand, and helps grantmakers shift their thinking. Her presentations to our board and funder network were engaging, informative and inspiring."*

- LaTida Smith, President,  
Moses Taylor Foundation

*"Kris's presentations are a compelling combination of solid best-practice information coupled with real-world examples from her work with numerous foundations."*

- Ret Boney, Executive Director,  
North Carolina Network  
of Grantmakers

*"Kris's presentation on grantmaking was one of the most valuable conference sessions I have ever attended. She fully engaged the group and made me think more strategically about our Foundation. I want to work more with her!"*

- Maureen Sheehan Massaro,  
Executive Director,  
Wilson Sheehan Foundation

## KRIS'S APPEARANCES

Kris has been asked to speak by many of the country's leading philanthropic organizations, including:

- Exponent Philanthropy
- Foundation Center
- Johnson Center for Philanthropy
- Philanthropy New York
- Southeastern Council of Foundations
- Northern California Grantmakers
- Philanthropy Northwest
- Philanthropy Ohio
- NC Network of Grantmakers
- Forefront
- NE Pennsylvania Grantmakers
- Colorado Association of Foundations



**Putnam Consulting Group**

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To learn more, contact Kris at 800.598.2102 or visit us at [putnam-consulting.com](http://putnam-consulting.com)



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### PRESS RELEASE

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### **Kris Putnam-Walkerly Named “Top 25 Philanthropy Speaker”**

CLEVELAND, May 19, 2016 — Kris Putnam-Walkerly, president of [Putnam Consulting Group, Inc.](#), was named as one of [America’s Top 25 Philanthropy Speakers for 2016](#) by Philanthropy Media and The Michael Chatman Giving Show. The Top 25 list was created from more than 25,000 survey responses from philanthropy experts, who submitted more than 1,000 nominees.

The criteria include thought leadership, excellence in communication, and significant contributions to the profession. Among her leading-edge approaches in the field is her concept of “Delusional Altruism”—misguided giving and lack of impact.

“This is a huge honor for me, and also resonates personally because I truly enjoy speaking about my passion —effective philanthropy,” said Putnam-Walkerly. “The fact that the list was formulated by others who share this passion makes it all the more humbling and inspiring.”

Putnam-Walkerly’s colleagues accorded the honor include U2 front man Bono, Ford Foundation President Darren Walker, W.K. Kellogg Foundation President LaJune Montgomery Tabron, PolicyLink President Angela Glover-Blackwell, Goodman Center founder Andy Goodman, and *Good to Great* author Jim Collins. “Kris is rightfully recognized with these peers as a huge contributor in her field,” says Alan Weiss, PhD, author of over 60 books on management excellence and himself in the National Speakers Association Hall of Fame®.

“Kris’s spot among the Top 25 is well earned,” said LaTida Smith, President and CEO of Moses Taylor Foundation, Scranton, PA. “Her recent presentations to our board and our area grantmakers association were engaging, informative and inspiring, and have set us all on a clearer path toward effectiveness. Kris is great at making the complex easy to understand, and helps grantmakers shift their thinking to embrace new possibilities and opportunities. We’ll derive value from her presentations for years, without a doubt.”



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### **About Kris Putnam-Walkerly**

Kris Putnam-Walkerly, MSW, is a global philanthropy advisor and president of Putnam Consulting Group, Inc. For over 16 years, top philanthropies have requested Kris's help to transform their giving and catapult their impact, including designing strategies that achieve results, streamline operations, assess impact, and allocate funds. Her clients include the Robert Wood Johnson, David and Lucile Packard, Winthrop Rockefeller, Annie E. Casey, Charles and Helen Schwab, and California HealthCare foundations, among dozens of others. She's helped over 50 foundations and philanthropists strategically allocate and assess over \$300 million in grants and gifts.

A thought leader in transformative philanthropy, Kris is the author of the forthcoming books *Confident Giving* and *Delusional Altruism*, and is a frequent contributor in the publications of leading philanthropy associations including the National Center for Family Philanthropy, Foundation Center, Southeastern Council on Foundations, Exponent Philanthropy, and AsianNGO Magazine. She provides expert commentary about philanthropy in the Wall Street Journal, Washington Post, Seattle Times, Washington Examiner, Entrepreneur.com, BusinessWeek.com, and others.

Prior to forming Putnam Consulting Group, she was a grantmaker at the David and Lucile Packard Foundation and an evaluator at the highly esteemed Stanford University School of Medicine.



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*Maureen Sheehan Massaro, Executive Director of The Wilson Sheehan Foundation*



Kris Putnam-Walkerly's presentation on grant making was one of the most valuable conference sessions I have ever attended. She fully engaged the group through storytelling and prompted deeper-level thinking that made me think more strategically about our Foundation. I want to work more with her!

*Nonet Sykes, Director, Race Equity and Inclusion, Annie E. Casey Foundation*

We trusted the Putnam team to create an honest retrospective about our work with race, both inside and outside the Casey Foundation — and they delivered beautifully. They made our staff and partners comfortable talking about a sensitive subject and allowed the spirit of our work to shine through. Now we have a way to share our story and use it to launch a new era of race equity and inclusion within Casey and beyond.



*Tina Markanda, Executive Director, Foundation for a Healthy High Point*



Kris is a wonderful and objective resource for professional coaching. She promotes thoughtful consideration of myriad issues to help determine the big picture, while simultaneously helping define strategic direction. Her clarity of thought helps each individual articulate his or her professional destination and develop the roadmap to get there.

*Juan Davila, Executive Vice President, Blue Shield of California*

Kris expertly managed our \$20 million grantmaking initiative to solicit, review, and select grantees to support Accountable Care Organizations (ACOs). Her consulting services are of exceptional quality and I highly recommend her.



*Angela Glover Blackwell, Founder and CEO, PolicyLink*



Today, everyone is trying to do more with less. You need consultants who are a quick study, who already have broad experience, and who can work with a variety of people. Putnam Consulting Group has all these qualities. We will definitely work with them in the future.

*Maisha Simmons, Senior Program Officer, Robert Wood Johnson Foundation*

Working with Putnam is extremely beneficial. Their attention to detail — specifically in analyzing and sharing information to support our decision making — helped us to stay organized and on time and really made an RFP process that was so overwhelmingly big seem well organized to all participants.



*Mark Smith, Former CEO, California HealthCare Foundation*



We've hired Putnam time and again for several projects, including objective evaluations of our own internal operations. The Putnam team stands out because they always take the time to really understand what we need, and they maintain their objectivity to make sound recommendations. I highly recommend them.

*Deborah Ellwood, CEO, CFLeads*

Kris led our board through a very comprehensive and thorough strategic plan refresh process that allowed us to confidently develop the next steps for our organization. It was just the right approach to amplify our impact.



*Lisa Bottoms, Program Director, The Cleveland Foundation*



We've received only positive feedback from our partners about Putnam Consulting Group. They helped me stay organized and ahead of the curve while organizing and planning one of the most comprehensive initiatives that our foundation has ever launched.

*Ret Boney, Executive Director, North Carolina Network of Grantmakers*

Kris's broad and deep knowledge of the philanthropic sector has been an asset as we work to help emerging foundations scale the learning curve. Her presentations are a compelling combination of solid best-practice information coupled with real-world examples from her work with numerous foundations.



*Allen Smart, Vice President, Kate B. Reynolds Charitable Trust*



The Putnam Team was instrumental in helping shape my big picture ideas into an actionable and sensitive representation of our major rural community health improvement initiative. The wealth of tools and connections they created to tell our story are things that we will use for years to come. We would definitely work with Kris and colleagues again.

*LaTida Smith, CEO, Moses Taylor Foundation*

Kris is great at making the complex easy to understand, and helps grantmakers shift their thinking to embrace new possibilities and opportunities. Her presentations to our board and grantmakers association were engaging, informative and inspiring, and have set us all on a clearer path toward effectiveness.





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### Potential Speaking Topics

#### About Kris Putnam-Walkerly

Kris Putnam-Walkerly, MSW, is a global philanthropy advisor who helps grantmakers achieve transformational impact. Kris is the author of *Confident Giving: Sage Advice for Funders*, and was recently named one of America's Top 25 Philanthropy Speakers. Her clients include the Commonwealth Fund, Robert Wood Johnson Foundation, Annie E. Casey Foundation, David and Lucile Packard Foundation, Charles and Helen Schwab Foundation, Heising-Simons Foundation, Cleveland Foundation, Avery Denison, Fujitsu, California HealthCare Foundation, Northern California Grantmakers, and dozens of other foundations and individual donors.

Kris regularly shares her knowledge on virtually every aspect of philanthropy with a variety of audiences, including seasoned and new funders. Kris has been a featured presenter at Exponent Philanthropy, North Carolina Network of Grantmakers, Southeastern Council of Foundations, Northern California Grantmakers, Northeastern Pennsylvania Grantmakers Forum, Philanthropy Ohio, Philanthropy Northwest, Donors Forum of Illinois, National Network of Consultants to Grantmakers, Iowa Funders Group, and Foundation Center – Midwest. She has also presented to and trained the boards of many foundations, including Moses Taylor Foundation, Ohio State Bar Foundation, The California Wellness Foundation, Cleveland Foundation, California HealthCare Foundation, and Stroke Awareness Foundation. Kris can speak on a wide range of topics in philanthropy. Below is a sample of options.

#### Topics

##### **Equity: Philanthropy's New Buzz Word or the Key to Achieving your Foundation's Mission?**

Equity is a trending topic in philanthropy, but many foundations are struggling to understand exactly what it means and how to address it. How are foundations incorporating equity into their work? What practices must they embrace internally in order to become truly equitable externally? What hurdles are they encountering on their equity journeys and how are they navigating through difficult conversations? This session will present the findings of an [equity field scan](#) our firm recently completed, and discuss several key points that the scan revealed about how foundations are incorporating equity into their internal operations. Participants will leave this session with a better understanding of what equity is and why it's important; the roles foundations can play; and how to find the right path to follow to a more equitable future. *This session can also include a funder who can share their experience incorporating equity across their internal operations.*

### **Poverty, Abundance and Delusional Altruism**

This provocative session will explain how many philanthropists and grantmaking foundations unknowingly operate with a poverty mentality that hinders talent, stalls creativity, and hijacks opportunity for systemic change. By contrast, an abundance approach to charitable giving allows philanthropists to give confidently for maximum impact and dramatic return. Participants will benefit from understanding how as grantmakers we all seek to be altruistic, but are “delusional” about how internal foundation bureaucracy, waste, under performance, a lack of speed, and lack of innovation are undermining the genuine impact grantmakers seek. Kris will share advice about how to achieve an abundance mentality; questions to test your abundance mindset; techniques for reducing your poverty mentality and increasing abundance; and real-world case examples to provide practice and inform discussion.

### **Is Your Philanthropy Respectful?**

There’s that old saying that when you work for a foundation, you automatically become better looking and smarter, and all of your jokes are funny. There’s no question that philanthropy involves an unequal power dynamic, and too few foundations pay attention to what others experience when dealing with them as grantees, partners or vendors. Good, old-fashioned “customer service” thinking can help foundation create a culture of mutual respect by understanding who their “customers” are, what they experience, how to improve that experience, and the ways poor treatment of others – even when unintentional – inhibits funders from accomplishing their missions. Participants also will learn what to do to become more respectful, using very simple techniques to improve their treatment of others and, in doing so, dramatically improve the effectiveness of their giving.

### **Streamline Your Philanthropy**

Philanthropic donors and foundations create unnecessary waste in their funding guidelines, application expectations, funding requirements, and approval processes. Worse, they are under the delusion that the less they spend on their own internal processes, the more efficient and effective they are. As a result, top talent is wasting time on administrative tasks rather than strategic thinking and partnership development, program staff waste months preparing materials for board meetings that board members never read, and grantees are left in the lurch for months while decision processes grind on. In this session, participants will learn 10 ways to streamline the entire grantmaking operation to create a more rewarding process for all.

### **Learn, Rinse and Repeat: Techniques to Continuously Learn and Improve**

Many philanthropists talk a good game about being strategic. They develop strategic plans, create logic models, and announce new funding initiatives. But few intentionally learn from their own experiences or build their organizational capacity to be strategic grantmakers. Philanthropic strategy development is an ongoing cycle that involves planning, testing, learning, modifying, implementing, evaluating, and planning some more (or jettisoning what simply doesn’t work). But most funders jump from planning to implementing, without learning and course correcting. In this session, Kris shares many techniques funders can incorporate into their exiting work to ensure that they build their learning muscle, guaranteeing stronger outcomes and better deployment of resources.

### **Strategic, Responsive, or Both?**

Every foundation likes to consider itself strategic. But what does “strategic grantmaking” really mean, and is it always the best course of action? This session will define responsive and strategic grantmaking, the pros and cons of each, when it’s appropriate to be responsive to community needs and when it’s best to identify and focus on specific issues, 4 ways foundations to combine strategic and responsive approaches, real-life examples of responsive and strategic grantmaking at other foundations, 5 mistakes to avoid when focusing your grantmaking, the role of the Board in strategic grantmaking, and identification of actionable next steps.

### **High Risk, High Return: How to Fulfill the Promise of ‘Research & Development’ Style Philanthropy**

Many funders are experimenting with philanthropy that counts money as only one of many assets. They achieve impact by developing deep knowledge, engaging with the community, taking bold risks, and constantly evolving their approach as they listen, learn, and stay close to the action. Discover the practices and mindsets of a “research and development” approach to philanthropy. In this session Kris will share the 12 tools and 5 mindsets of R&D philanthropy, and develop action steps that listeners can implement immediately.

### **4 Steps for Fostering Innovation**

Too often foundations request "innovative ideas" from their grantees but fail to accomplish the same thing internally – or even define what "innovation" means to them. The implied assumption is that innovation "just happens." Further, lack of a clear definition has come to imply that innovation must be a dramatic, game-changing, disruptive new idea or practice: the iPhone of early childhood education, the Post-It note of economic development. As a result, the expectations for innovation are so high and so fuzzy that most people naturally feel intimidated, not realizing that they too can create innovations and that innovation is not the exclusive domain of those who are smarter or more creative. However, the reality is the opposite. In this session, Kris will help grantmakers identify ways they can generate, vet, test, and implement innovative ideas as part of their ongoing practice.

### **Essential Roles of Foundation Boards**

If you’re new to board leadership in philanthropy, you’re bound to have more questions than answers. At this dynamic and provocative session for new board members, or boards of new foundations (such as health conversion foundations) participants will learn: how to manage – and exceed – expectations, essential roles of foundation boards and board members, six mistakes new foundation boards make and how to avoid them, and the power dynamic of being the funder.

### **Essential Practices for Effective Grantmaking**

The options for effective grantmaking are more varied today than ever. What used to involve simply making financial gifts to qualified nonprofits now has grown to include public-private partnerships, social impact investing, program-related investing, crowdfunding and many more avenues for achieving a foundation’s mission. Whether your foundation is just getting off the ground or has a venerated history that’s about to enter a new phase, you’ll have many choices to consider as you plan your way forward. However, there are some basic core practices of grantmaking that should never go out of style, regardless of a foundation’s grantmaking process, capacity, culture or history.

In this session, Kris will share 11 core practices of effective grantmaking and how to develop a structured process that fits your mission, goals, capacity, and style of operating.

### **Grantmaking Essentials 2.0 – Smart Practices of Savvy Grantmakers**

So, you've been around your foundation for a while. You've mastered the basics — the essentials you need to create a solid grantmaking strategy and process. How do you take your work and your effectiveness to the next level? It's one thing to be competent; it's another to go beyond the basics and really hone your craft. This session Kris will explain nine smart grantmaking practices that will help you do just that.

### **Extraordinary Grantmaking**

Making grants is a primary tool in the philanthropist's toolbox, so it should be done extraordinarily well. In this session, Kris will explain how participants can dramatically increase the impact of their grantmaking, five grantmaking mistakes to avoid, ways to shape their next funding initiative for success, six signs a funding initiative is in trouble, and tips for effectively using RFPs.

### **5 Best Practices of Extraordinary Grantmakers**

It's easy to think of grantmaking as the purview of program staff, but extraordinary grantmaking only happens when a foundation's top leaders understand and nurture an environment in which the extraordinary can thrive. This provocative session is designed specifically for foundation CEOs and trustees. In it, Kris will share key ways to create a culture of innovation, embrace an abundance mentality vs. a poverty mentality, streamline operations, intentionally learn and improve, and collaborate with other funders for impact.