BUILDING GRANTEE RESILIENCE
In celebration of our 25th Anniversary, Community Memorial Foundation is turning silver into gold through a series of opportunities aimed at: increasing local impact and furthering the Foundation’s vision of community transformation.

We honor 25 years of partnership by celebrating the strength and resilience of our grantee partners through two complimentary components:

1. An enhanced capacity building program
2. A special anniversary year grant opportunity

By strengthening our grantees’ organizational sustainability, we aim to empower our local sector to increase positive health outcomes for the next 25 years.
Community Memorial Foundation’s 2020 Capacity Building Program encompasses three phases.

**PHASE I | Leadership Institute Workshops**

The Foundation will host a series of workshops for grantee staff and board. The program will be facilitated by Fiscal Management Associates (FMA), a national organization with a 20-year history of strengthening grantee operations. (Trainer bios provided herein.)

**PHASE II | Self-Assessment & Working Session**

Following the final Leadership Institute workshop, grantees will complete a self-assessment and can participate in a working session, where they will be guided in crafting a Resilience Plan that addresses financial planning and increases organizational sustainability through one or more actions.

**PHASE III | RFP & Resilience Plan**

Organizations participating in the special 2020 grant opportunity will be required to submit an RFP, which will include their Resilience Plan. FMA has provided a Resilience Plan template (included herein) to help identify strengths and areas of improvement.
PHASE I

LEADERSHIP INSTITUTE WORKSHOPS

The Leadership Institute consists of three in-person workshops. Each workshop will be presented three times, allowing representation for up to 30 organizations/90 people per session.

Workshops are intended for leadership teams of up to 3 people, including staff and board; groups are encouraged to bring their most senior leaders and to attend all three trainings consistently. All workshops will be held at the La Grange Country Club.

Register for all events at CMFDN.ORG/25
### WORKSHOP 1

**Introduction to Financial Resilience and Planning**

This workshop introduces participants to the values, practices and resources needed to achieve financial resilience, including developing an inclusive budgeting process and developing tools for multi-year financial planning.

**Workshop Dates & Times:**
- April 15, 2020 1:00 PM – 4:00 PM
- April 15, 2020 5:00 PM – 8:00 PM
- April 16, 2020 8:30 AM – 11:30 AM

### WORKSHOP 2

**Understanding True Cost**

This workshop breaks down the annual operating budget to help participants better understand the nuance between direct, indirect and overhead costs. The goal is to be more capable of articulating the “true cost” of individual programs and overhead to funding sources and other key constituents.

**Workshop Dates & Times:**
- April 22, 2020 1:00 PM – 4:00 PM
- April 22, 2020 5:00 PM – 8:00 PM
- April 23, 2020 8:30 AM – 11:30 AM

### WORKSHOP 3

**Performance Management**

This workshop introduces key concepts and best practices on internal monitoring; managing financial results; and using reports to make resilience and mission-focused decisions.

**Workshop Dates & Times:**
- May 13, 2020 1:00 PM – 4:00 PM
- May 13, 2020 5:00 PM – 8:00 PM
- May 14, 2020 8:30 AM – 11:30 AM

### GRANTEE BOARD TRAINING

**Financial Resilience For Board Members**

This workshop provides an overview of financial resilience specifically for board members of grantee organizations. Board members will learn how to support their organizations in developing the practices and resources associated with financial resilience.

**Grantee Board Training Date & Time:**
- May 14, 2020 4:30 PM – 7:30 PM
PHASE 2

SELF-ASSESSMENT & WORKING SESSION

Organizations will conduct a self-assessment to identify strengths and areas of improvement that will point to explicit action steps for their Resilience Plan.

SELF-ASSESSMENT & WORKING SESSION

FMA will also provide a 3-hour working session, where grantees can receive coaching, consultation and peer learning to complete their plan.

CMF Training Room | 15 Spinning Wheel Road, Lower Level

Session Dates
June 9 – 11, 2020
Details to Follow

PHASE 3

25TH ANNIVERSARY GRANT OPPORTUNITY

The Foundation will commemorate its 25th Anniversary by offering $20,000 in general operating support to strengthen organizational sustainability.

To qualify, an organization must:
• Have received funding from the Foundation within the past 3 years
• Attend at least two Leadership Institute workshops
• Submit a Resilience Plan
• Demonstrate a $5,000 allocation aimed at supporting organizational sustainability
• Complete a 12-month progress report

Questions?
Please see the Q&A sheet provided herein or contact Foundation staff at 630.654.4729.
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