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## **Putnam Community Investment Consulting Partial Client Summary**

### **Robert Wood Johnson Foundation**

- Helped to design and launch a \$14 million Frontline Workforce Development Initiative focused on health and healthcare. Worked included clarifying program direction, drafting a Call for Proposals, convening a national advisory panel, organizing a series of regional conferences, and supporting initiative rollout.

### **The Cleveland Foundation**

- Supported development of a Youth Development Initiative for Cuyahoga County.
- Conducted a scan of potential philanthropic and public funding, organized site visits of Cleveland-area stakeholder to visit 4 cities with similar initiatives, helped to develop and facilitate a Task Force, conducted a literature review, and initiative development.

### **Charles and Helen Schwab Foundation**

- Designed a three-year funding initiative to support foster care youth.
- Researched, designed and developed grantmaking programs, strategies, and funding recommendations in the areas of substance abuse treatment, poverty prevention, homelessness, and youth development.
- Developed plan to transition 116 grantees following changes in Foundation priorities.
- Successfully recommended 27 grants totaling \$2.2 million dollars.
- Prepared seven position papers outlining the Foundation's position on substance abuse.

### **Northern California Grantmakers**

- Conducted needs assessment and strategic plan for disaster preparedness and response.

### **Pacific Forest and Watershed Lands Stewardship Council**

- Developed 2007 grantmaking plan for Youth Investment Program.
- Facilitated multiple grant review processes for Board and External Advisory Panel.

### **The James Irvine Foundation**

- Conducted a scan of foundation giving in California.
- Conducted a scan of leadership award programs and assisted the Foundation in creating a statewide leadership award program, based on recommendations from the scan. Conducted site visits with awards program finalists.

### **Stuart Foundation**

- Reviewed clusters of youth development grants to determine funding impact. Final reports presented to foundation board of directors.
- Analyzed five years of funding activity.
- Conducted a scan of the youth development field to assist the CEO and Board of Directors in making programmatic and budgetary decisions, and to better communicate the grantmaking program.

### **Blue Shield of California Foundation**

- Organized all aspects of a \$4 million funding initiative for community health clinics, including RFP development, dissemination, technical assistance, proposal review, and funding recommendations. One year later managed a renewal funding process for \$6.1 million.
- Reviewed grant applications and made funding recommendations.
- Reviewed interim and final reports for an initiative of 175 grantees and prepared reports.

### **The California HealthCare Foundation**

- Prepared a policy brief on a State of California proposal to streamline Medi-Cal eligibility.
- Conducted a feasibility study to determine the need for a Medi-Cal consumer's guide.
- Assisted CEO and Board of Directors to identify strategies for foundation-wide evaluation. This included conducting a scan of the field of philanthropy. Findings disseminated nationally.

### **The California Endowment**

- Conducted environmental scans and made program and funding recommendations in the areas of leadership development, substance abuse treatment, and community health.
- Contracted through Mauer Kunst Consulting to assess possible grantmaking opportunities in the areas of child and adolescent health and ethnic philanthropy, resulting in \$8.8 million in funding.
- Successfully reviewed and recommended grants totaling over \$700,000.

### **Westside Community Mental Health Center**

- Facilitated planning retreat for the agency's Leadership Team.
- Conducted preliminary research and planning to assist Westside in creating an Afro-centric mental health leadership and training program.

### **PolicyLink**

- Researched leadership development strategies and assisted in writing a report for an initiative by the Hewlett Foundation to increase leadership of color engaged in policy work.
- Analyzed data on regionalism, smart growth, and gentrification; edited and revised a report to guide program development for the Annie E. Casey Foundation.

### **The California Wellness Foundation**

- Investigated and prepared report outlining the potential for a new leadership recognition program; the Foundation's decision not to develop this program was based on report findings.
- Presented evaluation findings on Violence Prevention Initiative to the Board of Directors.