



**GEO National Conference
April 12-14, 2010
Pittsburgh**

Conference Program

[Last updated 12-15-09]

Monday, April 12, 2010

9:00 AM – 12:00 PM Conference Pre-sessions

Smarter Grantmaking Starts Here: Getting to Know the GEO Community (10:00 am – 12:00 pm)

Session Designer: Laurel Jacobsen, GEO

Description: GEO is a vibrant community of more than 350 grantmakers focused on supporting nonprofit effectiveness through investments in leadership, learning, appropriate financial structures and stakeholder engagement. In this session, participants will learn more about GEO's philosophy on smarter grantmaking and GEO's agenda for change. Through networking and small-group conversations, participants will meet like-minded peers and explore questions and challenges together. While this session is designed with new GEO members or first-time conference attendees in mind, anyone is welcome to come to meet new colleagues and dig deeper on issues related to smarter grantmaking.

Speakers: Courtney Bourns and J McCray, GEO

Creating a Learning Culture that Improves Impact

Session Designer: Marilyn Darling, Signet Research & Consulting, LLC

Description: Leaders who think about "becoming a learning organization" in a conventional sense may drive their organizations toward investing in ad hoc activities that do not ultimately improve grantmaking results. Creating a culture for learning that improves impact starts with leadership. This session, designed for foundation leaders and senior staff, will present new research findings on grantmaker learning practices. Participants will assess their own attitudes and practices toward learning and will have an opportunity to explore with peers what they are doing to increase impact through their culture and practices. Attendees will leave the session with a draft self-assessment they can use to stimulate a dialogue with their staff, and specific ideas for how they can improve their organizations' learning culture.

Speakers: Gayle Williams, Mary Reynolds Babcock Foundation; Jerry Paul, Deaconess Foundation; David Nee, William Casper Graustein Memorial Fund; Marilyn Darling, Signet Research & Consulting, LLC

On the Money (9:30 am to 12:00 pm)

Session Designer: Lori Bartczak, GEO

Description: The for-profit sector has a set of sophisticated financial instruments that have proven outcomes — not so in the nonprofit sector. While the nonprofit sector has grown increasingly

sophisticated in many dimensions of organizational effectiveness, the financial tools for managing operations, sustainability and growth have lagged behind. This is beginning to change. Grantmakers in search of best practices seek answers to basic questions: What is the right type of money to provide grantees in specific situations? How can funders support the long-term sustainability of their grantees? This workshop, based on GEO's *On the Money* publication, offers an opportunity for grantmakers to reflect with colleagues about how to do a better job supporting nonprofit success. Session content will focus on key financial challenges nonprofits face, promising financial tools grantmakers are using, and changes grantmakers can make to better support grantees.

Speakers: Nancy Burd, The Burd Group; Lois Greco, Wachovia Regional Foundation; Elizabeth George, Deaconess Foundation

Reducing the Burden: Streamlining Your Grants Application and Reporting Processes

Session Designer: Jessica Bearman, Bearman Consulting/Project Streamline

Description: Streamlining your grants application and reporting processes takes more than technical fixes -- there are often challenges related to organizational culture too. Through this highly interactive session, grantmakers will explore the phases of streamlining and develop their own pathway. We will a) explore current systems of application and reporting and consider whether they place unnecessary burdens on nonprofit partners; b) surface and check assumptions about the kinds of information necessary for effective and responsible grantmaking; c) identify cultural challenges to streamlining and ways to overcome them; d) share stories and lessons-learned about efforts to streamline grantmaking practices; and e) create action plans for beginning or advancing streamlining work.

Facilitator: Jessica Bearman, Bearman Consulting/Project Streamline

12:30 PM – 2:30 PM Standing in Their Shoes: How Widespread Empathy Leads to Better Decisions (*Opening Luncheon Plenary*)

Description: Increased empathy and understanding can help close the distance between grantmakers and grantees, strengthen program quality and maximize bottom-line results. When grantmaking staff see the world through other people's eyes, they forge deeper community connections, identify new opportunities to advance their missions and acquire the courage to take risks. Dev Patnaik, author of *Wired to Care*, will offer innovative ideas for how grantmakers can build empathy for the communities they serve, bring stakeholders into the center of their work and shape more effective collaborations.

Speaker: Dev Patnaik, Jump Associates

3:00 PM – 4:30 PM Conference Breakout Sessions Round A

A1: Leveraging Failure

Session Designer: Steven Isaacs, Robert Wood Johnson Foundation

Description and Speakers: TBD

A2: Foundations and Communities of Color: A Conversation About What's Working and What We Can Do Better

Session Designer: Anne Vally, The James Irvine Foundation

Description: The field is percolating with criticism that foundations do not do enough to benefit low-income communities and communities of color. How valid is this criticism? Can grantmakers do more to help communities of color? This session will explore several case studies and tap audience members' experiences to determine what is working and what needs to change in the way grantmakers and diverse communities relate and collaborate.

Speakers: Anne Vally, The James Irvine Foundation; Kari Mah, The William and Flora Hewlett Foundation; Steve Lew, CompassPoint Nonprofit Services; Tony Banegas, Arizona Community Foundation

A3: Strategic Philanthropy and Effective Grantmaker-Grantee Relationships

Session Designer: Paul Brest, The William and Flora Hewlett Foundation

Description: Effective nonprofit organizations deserve flexible funding and considerable autonomy to develop and implement their plans. But these nonprofits often depend on grantmakers that have their own passions, concerns and ideas. When is it appropriate for a grantmaker to be involved in a grantee's strategy, theory of change and measures of impact; and when should a grantmaker stand back? This session will engage the audience and panelists in a deep conversation exploring how tension is reconciled between the idea of nonprofit autonomy and the realities that justify grantmakers' imposition of restrictions, particularly around assessing impact.

Speakers: Paul Brest, The William and Flora Hewlett Foundation; Sean Stannard-Stockton, Tactical Philanthropy; Alexa Culwell, Stupski Foundation (moderator)

A4: How Social Media Enables Power Shifts at the Grassroots

Session Designer: Berit Ashla, The Tides Foundation

Description: In these tight economic times, nonprofit organizations and grantmakers need effective ways to engage and collaborate. Social media is changing how grantmakers and grantees reach out, inspire and obtain new supporters. Hear from talented leaders who are harnessing the power of social networks to increase support for nonprofits and make real change in communities traditionally marginalized or left out of key policy decision making. In a fast-paced conversation, panelists will describe their work in leveraging technology for effective relationship-building with nonprofit stakeholders and explore what grantmakers can do to help ease their grantees into this new reality.

Speakers: Berit Ashla, The Tides Foundation; Garlin Gilchrist II, Center for Community Change; Vivien Luk, The Forbes Funds; Joseph Mouzon, Tides Advocacy Fund

A5: The Emerging Culture of Civic Engagement Evaluation

Session Designer: Trish Tchume, Building Movement Project

Description: For years, organizations involved with civic engagement initiatives have bristled at the notion of evaluating their work — a process that sometimes leads to being quantified, compartmentalized and stripped of intangible value. But new models and tools — such as theories of change, developmental evaluation and embedded evaluators — offer funders and organizations the opportunity to shift their relationship and the culture around evaluating these initiatives. Building on recent conversations among practitioners, funders and researchers on the topic of civic engagement evaluation, participants will have the chance to get up to speed on the most current approaches to civic engagement evaluation.

Speakers: Audrey Jordan, The Annie E. Casey Foundation; Trish Tchume, Building Movement Project; Bo Thao, Asian American/ Pacific Islanders in Philanthropy; Ehren Reed, Innovation Network, Inc.

A6: Long-term Nonprofit Solutions to a Short-term Crisis

Session Designer: Leon Wilson, Nonprofit Finance Fund

Description: This is a time of immense change in the nonprofit arena. All of us are giving significant attention to matters of mission, financial stability and relevance to our constituents. Reduced reliance on government and other private dollars has meant an even more important role for grantmakers in assuring that nonprofits will continue to provide their essential services. This session will cover the sector's response to current and anticipated economic trends. Some of the key questions that will be answered in this highly interactive session are: What are some grantmakers doing to address the current nonprofit economic climate? What are probable long-term solutions? Are we in the midst of a crisis or a correction? Are there indicators suggesting a longer term negative impact on the nonprofit sector than the general economy? What are the measures to be taken that will lead to long-term nonprofit stewardship?

Speakers: Leon Wilson, Nonprofit Finance Fund; Geeta Pradhan, The Boston Foundation; Diana Bucco, The Forbes Funds

A7: Breakthroughs in Social Impact Measurement

Session Designer: Mark Kramer, FSG Social Impact Advisors

Description: Recent developments in web-based technologies have allowed the creation of new systems for measuring social impact across hundreds of organizations. These innovative initiatives carry implications for foundations beyond performance measurement and could change the way our sector views effectiveness. Participants will hear findings from research that uncovered three different types of social impact measurement systems and learn more about how a cross-sector collaboration to improve education in Cincinnati created shared goals and metrics and a platform for measuring results.

Speakers: Kathryn Merchant, The Greater Cincinnati Community Foundation; Jeff Edmonson, Strive; Nancy Zimpher, State University of New York; Mark Kramer, FSG Social Impact Advisors

A8: Philanthropy's Role in Revitalizing Pittsburgh

Session Designer: Leonor Alfonso, GEO

Description: Local grantmakers have played a vital role in helping remake this former steel town into a growing hub of economic, social and cultural activity. More jobs are available now than before, the environment is cleaner and poverty rates have dropped. Prominent foundations in the area have made broad and deep investments, including funds for innovations in green technologies, education, human services and the arts. Hear from leaders of these foundations about how they have turned their visions into reality through their grantmaking.

Speakers: TBD

4:30 PM – 5:30 PM Connection Space and Philanthropy's Tool Shed

Description: In response to feedback that one of the greatest benefits of GEO conferences is access to a community of like-minded colleagues, GEO is offering an open forum for attendees to connect with one another at the end of the day Monday and Tuesday. Use this time to meet with the colleagues you were hoping to see at the conference. Sign up to lead or join a roundtable discussion — sign-ups are posted at the registration area. Or visit Philanthropy's Tool Shed—an interactive exhibit of four tools designed to help grantmakers in their work.

6:00 PM – 8:00 PM Welcome Reception at the August Wilson Center
(pending)

Tuesday, April 13, 2010

8:30 AM – 10:30 AM **The Possibilities and Perils of Scale**

(Breakfast Plenary)

Description: Grantmakers often pride themselves in finding the most promising nonprofit programs and giving those organizations the support they need to scale up their services and expand impact. Yet some nonprofit leaders argue that the insular focus on individual organizations – a focus on building infrastructure and capacity and the fundraising work that goes along with that – gets in the way of the types of nonprofit collaboration and movement building that could have a greater impact. This session will explore the stories and perspectives of two nonprofit leaders – Bill Strickland, head of the Manchester Bidwell Corporation, a large organization that has significantly scaled and replicated its programs and Angelica Salas, leader of the Coalition for Human Immigration Rights of Los Angeles, working to build a movement at the grassroots level.

Speakers: Bill Strickland, Manchester Bidwell Corporation; Angelica Salas, Coalition for Humane Immigration Rights of Los Angeles; Grant Oliphant, The Pittsburgh Foundation (moderator)

11:00 AM – 12:30 PM **Conference Breakout Sessions Round B**

B1: How Movements Work and How to Support Them

Session Designer: Linda Wood, Evelyn & Walter Haas Jr. Fund

Description: "Social movements are a hidden underpinning of the American story," says Manuel Pastor, University of Southern California scholar and expert on social movements. Growing philanthropic interest and recent openness to investing in social movements, community organizing and policy change will require new relationships and new grantmaker approaches. This session will explore what makes a successful social movement, how to align with other funders on common goals, the capacities that need to be built, and the funding opportunities that exist. From their own experience as movement funders, panelists will share the specific roles funders can play and co-investment strategies that have been used for greater impact.

Speakers: Linda Wood, Evelyn & Walter Haas, Jr. Fund; Manuel Pastor, University of Southern California; Taryn Higashi, Unbound Philanthropy; Matt Foreman, Evelyn & Walter Haas, Jr. Fund

B2: Lessons from EMCF's Growth Capital Aggregation Pilot

Session Designer: Albert Chung, The Edna McConnell Clark Foundation

Description: The Growth Capital Aggregation pilot, led by the Edna McConnell Clark Foundation (EMCF), has brought together 23 funders to raise \$120 million in growth capital for three nonprofit organizations. This collaboration is unique, but not only because of the scale of the funds committed. The partners are highly aligned. The project uses one set of grant terms and payment schedules. One "lead co-investor" assumes administrative and reporting responsibilities for the co-investors. And a set of unified performance metrics allow grantees to focus on execution of business plans. The session will help grantmakers large and small think about how to develop co-investments strategies.

Speakers: TBD

B3: Connecting with Results-Driven Nonprofits

Session Designer: Susan Musinsky, Root Cause/Social Innovation Forum

Description: Traditionally, philanthropic investors and nonprofit organizations have often operated in silos. Grantmakers can improve the impact of their investments by engaging in a community of likeminded investors — including business leaders, local government leaders, and individuals — to

support nonprofit organizations that have demonstrated their ability to solve pressing social problems. In this interactive workshop, attendees will explore how to build an engaging community that enables investors and the nonprofit organizations they support to grow their social impact together. The session will share lessons learned from the implementation of a community-building approach to accelerate social impact developed by Root Cause's Social Innovation Forum. Participants will also explore other ways grantmakers can build effective, forward-thinking relationships with their grantees.

Speakers: Susan Musinsky, Root Cause/Social Innovation Forum; Phoenix Wang, The William and Flora Hewlett Foundation; Yvonne Moore, The Daphne Foundation; Lindsay Hyde, Strong Women, Strong Girls

B4: Nonprofit Funding Models

Session Designer: Liz London, The Bridgespan Group

Description: It has become increasingly clear that nonprofit funding strategies and financial sustainability are central to creating a vibrant and effective sector. Yet our understanding about these issues is far less sophisticated than our understanding of programs. In particular, conventional wisdom about the wisdom in funding diversification for nonprofits has not always served us well. Participants will hear key insights from Bridgespan's recent research on ten funding models that have most commonly supported successful nonprofit organizations and explore how those models might apply to their grantees' work.

Speakers: William Foster, The Bridgespan Group

B5: Leveraging Grantmaker Knowledge and Networks

Session Designer: Ted Chen, W.K. Kellogg Foundation

Description: While philanthropy's core business is to make grants to nonprofit organizations, we also generate new knowledge and networks from the work we fund. These "byproducts" are potentially as valuable as our money. Our knowledge and networks often go untapped because we rely heavily on written reports as the main means to transmit knowledge and information, which are not always the most effective. This session will address the central question, "What makes a knowledge product effective so that the benefit of new knowledge contributes to positive social change?" Panelists will explore examples of where knowledge transfer has been successful as well as new tools to increase the influence of our knowledge and networks.

Speakers: Suzanne Muchin, ROI Ventures; Rachel Bellows, ROI Ventures; Ted Chen, W.K. Kellogg Foundation, Fran Loosen, Think-Do-Learn Collective

B6: Leading from Within

Session Designer: Gayle Williams, Mary Reynolds Babcock Foundation

Description: Bold leadership comes from skilled visionaries who are grounded in deep self-knowledge about their values, gifts, shortcomings and vocational calling. These leaders guide their colleagues and organizations to new levels of mission-driven impact. But the exploration of "leading from within" is a fundamental and often ignored element in leadership. This session will explore connections between leaders' deep self-knowledge and organizational effectiveness.

Speakers: Terry Chadsey, Center for Courage and Renewal; Akaya Windwood, The Rockwood Fund; Colette Murphy, George Cedric Metcalf Charitable Foundation; Gayle Williams, Mary Reynolds Babcock Foundation

B7: Communications: Mission-Critical

Session Designer: Curt McPhail, Mary Black Foundation

Description: Communications are sometimes neglected activities in grantmaking organizations but can convey critical messages to key stakeholders and help fulfill their missions. Grantmakers can adopt a variety of communications capacities, decisions and strategies to support their programs and grantmaking. For example, Spitfire Strategies has developed a set of experience-based communications and strategy-building tools for social change; the FrameWorks Institute uses in depth research to

structure study circles aimed at building the capacity of organizations to use communications to create lasting social change. Hear from these two different communications groups about how they frame, build and deploy communication campaigns to help further social goals.

Speakers: Curt McPhail, Mary Black Foundation; Lynn Davey, Frameworks Institute; Kristen Grimm, Spitfire Strategies

B8: Institutionalizing Diversity: Effective Organizational Diversity Policies and Practices Within Philanthropy

Session Designer: Dianne Yamashiro-Omi, The California Endowment

Description: Foundations are incorporating diversity into their organizational policies and practices in various ways. This session will introduce participants to the Foundation Diversity Policies and Practices Toolkit, and representatives from foundations featured in the toolkit will discuss how and why they work to institutionalize diversity within their organizations. Attendees will discuss the challenges and opportunities foundations face in “walking the talk” of diversity policies and practices.

Speakers: Dianne Yamashiro-Omi, The California Endowment; Victor De Luca, Jessie Smith Noyes Foundation, Inc.

12:30 PM – 2:45 PM Leading in Challenging Economic Times

(Luncheon Plenary Session)

Description: Big challenges call for bold responses. The decisions foundation leaders make today about how to respond to the economic downturn have critical implications for the effectiveness and stability of the nonprofits we support. By showing strong leadership at a time of such global uncertainty, philanthropy could tap latent interest and entice others to help find innovative solutions to the problems we face. Join a moderated conversation with foundation leaders about the difficult decisions they’ve had to make in the face of this recession and how they’ve reached out to grantees and other stakeholders along the way.

Speakers: TBD

3:15 PM – 4:45 PM Conference Breakout Sessions Round C

C1: Organizational Culture and Effective Grantmaking (A CEO and Trustee Session)

Session Designer: Jim Canales, The James Irvine Foundation

Description: Leaders in philanthropy often engage in behaviors that can either encourage or discourage effectiveness, but grantmakers can create within their foundations the preconditions for success. How can grantmakers remain attuned to the needs of those they seek to serve? How do they avoid insularity and arrogance, and hold themselves accountable? This session will gather a small panel of CEOs to share their ideas and strategies — as well as challenges and obstacles — to fostering a culture that leads to effective philanthropy.

Speakers: Handy Lindsey, The Cameron Foundation; Mariam Noland, Community Foundation for Southeast Michigan; Jim Canales, The James Irvine Foundation; Stephen Heintz, Rockefeller Brothers Fund

C2: Scaling Social Innovations: Aligning Public and Private Goals and Resources

Session Designer: Carla Javits, REDF

Description: As grantmakers, it can be daunting to figure out how to work in synch with, and not just parallel to, government agencies or businesses. With different styles, language, imperatives, accountability, and methods, identifying the right levers for cooperative effort can be difficult. Finding common ground across the sectors can lead to powerful results. As the economic downturn constrains resources on all sides, finding ways to make these joint efforts work is more important than ever. The federal government has signaled its interest in fostering this kind of cooperation. This session will highlight successful

collaborations between sectors and engage attendees in a discussion about how to initiate and cultivate these partnerships.

Speakers: Carla Javits, REDF; Margaret Petruska, The Heinz Endowments; Robert Hohler, Melville Charitable Trust; Torie Osborn, United Way of Los Angeles

C3: Running on Empty

Session Designer: Richard Moyers, The Eugene and Agnes E. Meyer Foundation

Description: A 2008 Urban Institute study supported by the Meyer Foundation revealed that a majority of nonprofits serving the Greater Washington region had less than three months of operating expenses in reserve and nearly a third had no reserves whatsoever. The attitude and behavior of grantmakers can contribute to this chronic undercapitalization of nonprofits. Nonprofits believe they will be penalized for establishing reserves or submitting budgets that show a surplus and many foundations don't support endowments or other capital campaigns. Join a facilitated discussion about how grantmakers can help organizations understand the importance of reserves and adopt practices that support organizations in building a financial base.

Speakers: Richard Moyers, The Eugene and Agnes E. Meyer Foundation

C4: Social Networking and *The Story of Stuff*

Session Designer: Berit Ashla, The Tides Foundation

Description: Social networking is creating exciting shifts in how coalitions are built, power is distributed and decisions are made. Annie Leonard, author of *The Story of Stuff*, shows how we are all interconnected and how social networks can generate tremendous traction and engage people in dialogue about a particular issue. Grantmakers who better understand social networking theory can improve their grantmaking practices and more confidently adopt and fund social media innovations. Hear from talented leaders who are harnessing the power of social networking theory to make real change in communities traditionally marginalized or left out of key policy decision making.

Speakers: TBD

C5: Creative Disruption: Sabbaticals as Tools for Organizational Capacity Building

Session Designer: Carrie Avery, The Durfee Foundation

Description: A national study of sabbatical programs for nonprofit leaders shows that sabbaticals are a relatively inexpensive yet highly productive capacity-building tool that yields measurable results. Not only do sabbaticals have revitalizing effects on leaders, their beneficial impact is felt throughout the organization for many years. A planned disruption like a sabbatical can cause secondary staff to build capacity and leaders to experience the benefits of shared leadership. Further, funders that operate sabbatical programs find that the close relationship they develop with their grantees enhances their awareness about nonprofit leadership challenges and increases their effectiveness as grantmakers. Panelists will share specific examples of how sabbaticals have worked for nonprofits and grantmakers and will offer ideas for implementing successful, creatively disruptive sabbatical programs.

Speakers: Deb Linnell, Third Sector New England; Claire Peeps, The Durfee Foundation; Bill Watanabe, Little Tokyo Service Center

C6: The Funder's Role in Networks

Session Designer: Diana Scarce, Monitor Institute

Description: Networks deliver powerful results — stronger community ties, collective action, coordinated services, breakthrough innovations. For grantmakers, networks present an exciting vehicle for increased social impact. However, most foundations are oriented toward funding single organizations, and the practice of supporting networks requires charting new territory. How can a foundation catalyze networks? What is a foundation's role in the networks it supports? How does this role change over time? How can a grantmaker help networks increase their impact? How do you assess the impact of networks? Drawing on the learning and tools developed by a community of practice of network funders, launched by the Hawaii Community Foundation and the Monitor Institute, this session will address questions

grantmakers are asking themselves as they experiment with supporting and participating in social change networks.

Speakers: Diana Scarce, Monitor Institute; Barbara Kibbe, Monitor Institute; Chris van Bergeijk, Hawai'i Community Foundation

C7: Dashboards and Scorecards

Session Designer: Gale Berkowitz, The David and Lucile Packard Foundation

Description: Data visualizations such as dashboards, scorecards, network maps, and mashups are creeping into our work, whether or not we like them or are able to interpret them. The increased adoption of new reporting tools at foundations and nonprofits represents a shift in organizational culture and process and a move toward strategically (and sometimes creatively) infusing data into the way we communicate about operations and progress. This session will encourage attendees to explore these tools and hear from developers about how they really work.

Speakers: Gale Berkowitz, The David and Lucile Packard Foundation; Roberto Cremonini, Barr Foundation; Brett Jenks, Rare; Kevin Rafter, The James Irvine Foundation

5:00 PM – 6:00 PM Connection Space and Philanthropy's Tool Shed

Description: In response to feedback that one of the greatest benefits of GEO conferences is access to a community of like-minded colleagues, GEO is offering an open forum for attendees to connect with one another at the end of the day Monday and Tuesday. Use this time to meet with the colleagues you were hoping to see at the conference. Sign up to lead or join a roundtable discussion — sign-ups are posted at the registration area. Or visit Philanthropy's Tool Shed—an interactive exhibit of four tools designed to help grantmakers in their work.

6:00 PM – 8:00 PM CEO Reception and Dine Arouds

Wednesday, April 14, 2010

8:00 AM – 9:00 AM Continental Breakfast

9:00 AM – 10:30 AM Conference Breakout Sessions Round D

D1: Keys to Successful Capacity Building

Session Designer: Ruth Jones, Social Venture Partners International

Description: A decade after Social Venture Partners Seattle first put its capacity building approach into practice, 25 SVPs in the US, Canada and Japan are investing in hundreds of nonprofit organizations and supporting their ability to achieve results. The French American Charitable Trust (FACT) is in its seventh year of offering a comprehensive capacity-building program. This session will explore the similarities and differences between these two approaches and highlight lessons learned and the keys to their success. In small group discussions, participants will have an opportunity to dig deeper into the capacity-building process and better understand approaches to setting goals and measuring progress along the way.

Speakers: Lynn Coriano, Social Venture Partners Seattle; Stephanie Cherrington, Explorations in Math; Laura Livoti, French American Charitable Trust; Sarita Gupta, Jobs with Justice

D2: Investment Strategies for Maximum Impact

Session Designer: Lucy Bernholz, Blueprint Research and Design, Inc.

Description: With the advent of new players and new structural models, the ways in which grantmakers can advance social initiatives are growing dramatically. Direct support of political advocacy, investing in social media ventures, making use of L3Cs and making investments that yield both social and financial returns are just a few of the options. Join the pioneers of these strategies for a session that explores new funding options with the goal of broadening participant “toolkits” for investing in the causes they care about.

Speakers: Lucy Bernholz, Blueprint Research and Design, Inc.; Jackie Khor, Imprint Capital Advisors; Bart Houlahan, B Corporation

D3: Strategies for Investing in Nonprofit Leadership

Session Designer: Michelle Gislason, CompassPoint Nonprofit Services

Description: Leadership development is on the forefront grantmakers’ minds, particularly as our grantees steer their organizations in challenging times. But, knowing how to make the right investments to build the competencies and capacities of those leaders and organizations can sometimes be tricky. New research will inform your investments in executive coaching and leadership training. This session will take the form of a hands-on clinic for grantmakers to explore the different types of strategies they can use to help support the growth and learning of grantee leaders.

Speakers: Michelle Gislason, CompassPoint Nonprofit Services; Linda Wood, Evelyn & Walter Haas Jr. Fund; Steve Fitzgerald, Bank of America Foundation

D4: From Evaluation to Performance Measurement: Transforming Grantmaker-Grantee Partnerships

Session Designer: Anand Dholakia, Root Cause

Description: Grantmakers have the opportunity to enhance their own and their grantees’ learning, and to help establish standards around which all stakeholders can communicate, by transforming the grant monitoring and grantee engagement processes. This panel will introduce performance measurement as an approach to evaluation that can lead to continuous improvement for maximized social impact.

Drawing on Root Cause's work with a variety of nonprofits and their funders, speakers will offer a series of case studies and lessons learned about performance measurement. Attendees will discuss their own evaluation-related successes and challenges with colleagues and learn new approaches for partnering with grantees for enhanced learning.

Speakers: Jacob Harold, The William and Flora Hewlett Foundation; Anand Dholakia, Root Cause; Colette Stanzler, Root Cause

D5: Grantmakers' Role in Supporting Federal Stimulus Grantees

Session Designer: Lori Bartczak, GEO

Description: Nonprofits across the country are preparing to receive large influxes of cash from the federal stimulus package, and in some extreme cases stimulus money exceeds nonprofits' current total budget. While this influx of funding presents significant opportunities for furthering the causes we care about, it comes with significant challenges as well. What can grantmakers do to help high-performing nonprofits make the most of the stimulus package? Participants will develop a set of recommended actions grantmakers can take to support grantees in receiving stimulus money – including how to support nonprofit leadership and build grantee financial capacity.

Speakers: Garvester Kelley, Nonprofit Finance Fund; Natalie Levkovich, The Health Federation of Philadelphia

D6: Making Innovation Purposeful

Session Designer: Stephanie Clohesy, Clohesy Consulting

Description: In board rooms, the media and nearly every document that passes through philanthropy, the word “innovation” has become code for whatever is new or almost new. But if innovation is to lead to real-world solutions, philanthropy must understand it more methodically and develop it systematically. A disciplined approach to innovation requires commitment to process, culture and leadership. The co-authors of a Kellogg Foundation report, *Intentional Innovation: How Getting More Systematic about Innovation Could Improve Philanthropy and Increase Social Impact*, will introduce a conceptual framework that shifts assumptions about innovation from accidental to intentional. Attendees will explore how philanthropy can play a critical role in transferring systemic innovation practice to the nonprofit sector and assess their own organizations' commitment to innovation.

Speakers: Stephanie Clohesy, Clohesy Consulting; Gabriel Kasper, Monitor Institute

D7: Virtual Global Learning Networks

Session Designer: Victoria Dunning, Global Fund for Children

Description: Navigating distance, time and other differences in global giving can be challenging. [Insert example here.] A number of organizations are finding innovative solutions to bridge these gaps and build learning networks with partners. Join a group of international nonprofits to explore what has worked in virtual learning and networking and possible implications for the future of global and local philanthropy.

Speakers: TBD

D8: Program Design Collaboratives for Social Breakthroughs

Session Designer: Nelson González, Stupski Foundation

Description: In developing strategies and programs, grantmakers and grantees often struggle to ensure broad stakeholder engagement, reduce dependence on experts and avoid time-consuming and costly “pilots” to test strategies. User-centered, cross-sector design collaboratives focused on rapid cycles of program development provide an opportunity to transform the ways in which we develop breakthrough results. These approaches are not “top-down”; they are collaborative, integrate multiple perspectives and respond directly to user needs. This session will review lessons learned from new development methodologies for grantmakers and will explore how these program design methods might be applied more broadly in grantmaking organizations.

Speakers: TBD

11:00 AM – 12:30 PM Conference Breakout Sessions Round E

E1: Collective Leadership: Nurturing Vibrant Organizations and Catalyzing Community Change

Session Designer: Claire Reinelt, Leadership Learning Community

Description: As grantmakers continue to explore ways to support nonprofit effectiveness and impact, we need to think differently about leadership and investments in individuals. There is a growing recognition that to achieve large-scale change, we need to unleash collective leadership capacity within groups, organizations and communities; leverage networks using social media and collaborative technologies; and support individuals and organizations working across differences to develop shared purpose, vision and coordinated action. To understand what is needed to achieve this scale of collaborative action, the Leadership Learning Community has joined forces with key experts in the field to provide direction to the field with a publication on collective leadership. During this session presenters will share initial findings and evidence about the need for collective leadership, models and tools for effectively supporting it, and tools for evaluating the impact of collective leadership work.

Speakers: Deborah Meehan, Leadership Learning Community; Barbara Squires The Annie E. Casey Foundation; Miho Althea Kim, DataCenter; Dale Nienow, Center for Ethical Leadership

E2: Leveraging Philanthropy's Best Intentions for Collaborative Change

Session Designer: Curtis Ogden, Interaction Institute for Social Change

Description: The promise of collaboration in grantmaking lies in its potential to build trust and alignment among key stakeholders, access innovative thinking, create complex solutions to complex problems, and achieve greater scale and reach through network building. This said, often those who set out with good collaborative intent find the process to be daunting, results elusive, and relationships strained. In this session, staff from the Interaction Institute for Social Change (IISC) will build on the learnings from GEO's Change Agent Project by leading participants through an interactive exploration of key questions, core collaborative concepts and models, case examples, and the wisdom and experiences of those in the room to help maximize the power of collaboration to achieve deep and lasting results.

Speaker: Curtis Ogden, Interaction Institute for Social Change

E3: Building a Growth Capital Marketplace to Scale Up High-Performing Programs and Organizations

Session Designer: Cynthia Massarsky, Growth Philanthropy Network

Description: Both philanthropy and government have learned that we need a new model for making significant progress in spreading solutions to our most difficult social problems — a pathway for funders to collaboratively and systematically engage in funding the scale up of effective initiatives. Through a series of role playing exercises, participants will examine the difficulties nonprofits face in moving to scale and the challenges of collaborative funding. Participants will learn about the components of a new capital marketplace and syndication process in which they can participate immediately to identify and finance the expansions of growth-worthy and growth-ready nonprofits.

Speakers: Alex Rossides, Growth Philanthropy Network

E4: Nonprofit Next: Five Key Trends that are Converging to Reshape the Social Sector

Session Designer: David La Piana, La Piana Consulting

Description: Philanthropy is being transformed by a broad range of trends – generational shifts, economic and political uncertainty, technology and networking, increased diversity, changing nonprofit boundaries and virtual work. They represent opportunities to rethink how nonprofits operate and work with stakeholders. At the same time, the deep global recession will raise the stakes – and nonprofits unable to navigate these trends may fail. La Piana Consulting will share recent research with funders and thought leaders about the development of these trends and host a discussion to explore how they might change philanthropy.

Speakers: David La Piana, La Piana Consulting; Heather Gowdy, La Piana Consulting; Jim Canales, The James Irvine Foundation

E5: New Research into Grantmaking Learning Practices

Session Designer: Marilyn Darling, Signet Research & Consulting, LLC

Description: Grantmakers want and need to learn how to advance their missions in complex environments and changing times. The goal of learning is not "lessons learned." Rather, it's about taking actions that increase impact. This session will explore preliminary conclusions of current Signet research involving the learning practices of a number of grantmakers. The research suggests that grantmakers are better served by shifting away from conducting stand-alone learning activities. Learning and evaluation should be integrated into the grantmaking cycle, and we must increase support for quality learning within grantee networks. Participants will discuss their own experiences and insights about learning through grantmaking, and take away a draft self-assessment tool to reflect on their own organization's culture and practices.

Speakers: Marilyn Darling, Signet Research & Consulting, LLC; Blair Dimock, Ontario Trillium Foundation

E6: Overheads and Full Cost Recovery: Lessons from the UK

Session Designer: Seb Elsworth, ACEVO

Description: The UK-based Association of Chief Executives of Voluntary Organizations led a hugely successful campaign to encourage UK funders to fully pay for the cost of nonprofit services. Participants in this session will learn about ACEVO's campaign and will explore how the US nonprofit sector might be able to leverage ACEVO's success. Questions participants will discuss include the following: Is full-cost recovery the right approach for all grantmakers? What barriers need to be overcome among grantmakers? What role can grantmakers play in helping nonprofits better understand how to allocate their costs? How would the UK experience translate to the US nonprofit sector?

Speakers: Seb Elsworth, ACEVO; Kristen Burns, The Grable Foundation

E7: How Do We Know Advocacy Grants Are Working?

Session Designer: Astrid Hendricks, The California Endowment

Description: Advocacy and public policy grants are "upstream investments" that have the potential to leverage broader systematic change. But uncertainty about how to evaluate advocacy grants can be a barrier to participation in advocacy grantmaking. The last several years have seen a tremendous growth in the advocacy evaluation field — where few resources and little expertise existed before, multiple tools and a growing base of experience now exist. In this session, a panel of practitioners will share what they have learned in designing advocacy work evaluations that are useful, manageable and resource efficient. Facilitated small group discussions will give attendees the opportunity to drill into key evaluation questions relevant to their own work.

Speakers: Astrid Hendricks, The California Endowment; Jackie Williams Kaye, The Atlantic Philanthropies; Thomas Kelly, The Annie E. Casey Foundation; Tanya Beer, The Colorado Trust

12:30 PM – 2:30 PM Together We Can: Philanthropy and The Obama Administration *(Closing Plenary Luncheon)*

Description: The Obama Administration's commitment to supporting nonprofits and its new social agenda offer a unique opportunity to leverage the investments and knowledge of grantmakers working on the ground. Leaders from the Obama Administration (to be determined) will discuss the administration's plans, seeking to find ways to build on the deep knowledge that the GEO community has developed for making the kinds of social investments needed to strengthen nonprofits and effectively address the causes we care about.

Speakers: TBD