

Grantmakers
for Effective
Organizations
presents



**Smarter Grantmaking.
Stronger Nonprofits.
Better Results.**

**2012 GEO
NATIONAL
CONFERENCE**

Held in partnership with Philanthropy Northwest

CONFERENCE PROGRAM

MARCH 12-14, 2012 | THE WESTIN SEATTLE

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Smarter Grantmaking. Stronger Nonprofits. Better Results.

2012 GEO NATIONAL CONFERENCE

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Sonya Champion, Champion Foundation (co-chair)

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Elizabeth Warman, Boeing Company

Heyward Watson, Impact Capital

Amy White, Pride Foundation

Grantmakers for Effective Organizations is a community of more than 370 grantmakers challenging the status quo in their field to help grantees achieve more.

Understanding that grantmakers are successful only to the extent that their grantees achieve meaningful results, GEO promotes strategies and practices that contribute to grantee success. We help grantmakers improve practices in areas which, through years of work in philanthropy, have been identified by innovators in the field as critical to nonprofit success: Learning for Improvement, Collaborative Problem-Solving, The Money, Stakeholder Engagement and *Scaling What Works*. More information on GEO and a host of resources and links for grantmakers are available at www.geofunders.org.

GEO Board of Directors

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Kathleen P. Enright, Grantmakers for Effective Organizations (ex officio)



WELCOME

The GEO community is united by a shared commitment to achieving better results. Recognizing that current practices in philanthropy are not doing enough to make progress on the issues they care about, GEO members strive to find more efficient and effective ways to grow their impact.

Welcome to Grantmakers for Effective Organizations' 2012 National Conference, held in partnership with Philanthropy Northwest. You are joining more than 650 philanthropic leaders here in Seattle for three days packed with engaging sessions, diverse perspectives and tools to help you make faster progress on some of society's most pressing challenges.

Responding to the extended economic downturn and diminished public support requires that grantmakers work hard to ensure that nonprofits have a chance to grow stronger. Big challenges call for bold responses. The decisions foundation leaders make today have critical implications for the effectiveness and stability of the nonprofits we support and the communities we serve. Because the scale and complexity of the issues we face require a coordinated response, many in philanthropy are experimenting with innovative partnerships to catalyze social

change. By sharing smarter grantmaking practices that contribute to stronger nonprofits, together we can achieve better results and create more impact in 2012 and beyond.

With this conference we offer a range of perspectives and new ideas to help you access the wisdom and knowledge inherent in our field. The conference planning committee designed a program that focuses on four core areas that are critical to nonprofit success: supporting effectiveness, evaluation and learning, scaling impact and collaborative problem-solving.

Previous conference attendees have valued the opportunities to connect with colleagues and dig deeper on key issues. On this year's program we're introducing some new formats, like short talks and facilitated conversations, designed to help you learn from the wisdom and experience of like-minded peers.

We hope you will take advantage of the expanded networking opportunities, like the networking lunch, dine-arounds and other special events to connect with peers and to continue the conversations sparked at the conference. You will also have the chance to discover Seattle and explore effective philanthropy in action through the welcome reception on Monday evening at the new Bill & Melinda Gates Foundation campus and site visits on Tuesday afternoon to local nonprofits.

This conference is only possible through the support of our sponsors, the creative contributions of our planning committee and the hospitality of our host committee. We hope you will find answers to some of your most burning questions and a network of peers that you can connect with for continued learning beyond the conference.

Thank you for joining us in Seattle, and we hope you enjoy the experience.

Kathleen P. Enright
President and CEO
Grantmakers for Effective
Organizations



A handwritten signature of Kathleen P. Enright in black ink on a white background.

Sidney Hargro
Executive Director,
Community Foundation
of South Jersey
Conference Planning
Committee Chair



A handwritten signature of Sidney Hargro in black ink on a white background.

SESSION TRACKS & SOCIAL MEDIA GUIDE

CONFERENCE SESSION THEMES

Choose from more than two dozen interactive and engaging breakout sessions. Conference sessions fall into content tracks that cover topics identified by GEO and experts in the field as contributing to smarter grantmaking. Each track is marked in the program with one of the icons below:



SUPPORTING EFFECTIVENESS sessions explore how grantmakers can improve practices to build grantee capacity and better support nonprofit sustainability.



SCALING IMPACT sessions offer strategies and knowledge about how we can help nonprofits achieve better and more results.



EVALUATION AND LEARNING sessions help grantmakers and their partners better use evaluation to foster learning and make real-time improvements in their work.



NETWORKING sessions allow for peer interaction and connections to help you turn learning into action.



COLLABORATIVE PROBLEM-SOLVING sessions focus on how grantmakers can best partner with other funders, grantees, corporations and government agencies to solve problems and grow impact.

SOCIAL MEDIA GUIDE FOR GEO'S 2012 NATIONAL CONFERENCE

Stay connected and keep track of what is happening at the National Conference. Our online resources ensure that you don't have to miss a single opportunity while you're here.



TWITTER

@geofunders

Follow GEO for the latest conference information and developments.

#2012GEO

Use this hashtag to join and track Twitter conversations related to the conference.

2012 Presenters

Want to connect with a conference presenter on Twitter? Check out the "2012 Presenters" list available from the @geofunders Twitter account.



FACEBOOK

Facebook.com/

grantmakers.for.effective.organizations

Get updates, check out conference photos, view the day's schedule and share your experience.

SOCIAL MEDIA HELP DESK

On Tuesday, during the networking lunch or facilitated conversations, visit the help desk (Grand Foyer) for an informal Q&A session with the leading nonprofit technology experts from NPower Northwest. Bring your social media questions and quandaries, and let NPower point you in the right direction.

BLOG

Beth's Blog: www.bethkanter.org

Visit the online headquarters for thoughtful reflections and comments on conference sessions. Share your thoughts and observations with your peers using the comment feature.

ATTENDEE ROSTER

www.geonationalconference.org/registration/who-is-attending

Browse the online attendee list to connect with like-minded colleagues. Conference participants will receive a copy of the roster with contact information included via email.

SESSION RESOURCES AND SPEAKER BIOS

www.geonationalconference.org/program-and-schedule/interactive-sessions-and-resources

Download speaker presentations and handouts, read speaker bios and search the program.

HAVE A CONFERENCE PHOTO, VIDEO, STORY OR IDEA TO SHARE WITH THE GEO COMMUNITY?

Send it to Danielle Yates, GEO's manager of marketing and communications, at **yates@geofunders.org**.

ADDITIONAL RESOURCES FOR GRANTMAKERS

www.geofunders.org

Visit GEO's website for more learning opportunities and resources, including GEO publications.

SCHEDULE AT A GLANCE

SUNDAY, MARCH 11, 2012

Registration is open from 5:00 p.m. – 6:00 p.m.
in the hotel lobby.





5:00 p.m. – 7:00 p.m. | Meet and Greet

 Lobby Bar at the Westin

MONDAY, MARCH 12, 2012

Registration is open from 8:00 a.m. – 5:15 p.m.
in Grand Foyer.

9:00 a.m. – 12:00 p.m. | Pre-Conference Workshops

-  W1: Getting to Know the GEO Community
(10:00 a.m. – 11:30 a.m.) *Grand I (Grand Level)*
-  W2: Designing Pathways to Collaborative Impact
Vashon (San Juan Level)
-  W3: Building Capacity for Evaluation and Learning
St. Helens (Mezzanine Level)
-  W4: Scaling Impact: The Grantmakers' Role
(10:00 a.m. – 12:00 p.m.) *Fifth Avenue (Grand Level)*

1:00 p.m. – 3:00 p.m. | Opening Plenary Luncheon

How Not to Grant
Grand II and III (Grand Level)

3:30 p.m. – 5:00 p.m. | Breakout Sessions Round A

-  A1: Six Ways Donors Catalyze Results
Grand I (Grand Level)
-  A2: Leveraging the Collective Power
of Board Advocacy
Vashon (San Juan Level)
-  A3: Learning in Public
Cascade II (Mezzanine Level)
-  A4: Lessons from the Field on the Finance of Scaling
Fifth Avenue (Grand Level)
-  A5: Intertwining Services Funding with Policy
Initiatives to Achieve Systems Change
Cascade AB (Mezzanine Level)
-  A6: Supporting Washington's Nonprofit Ecosystem
St. Helens (Mezzanine Level)
-  A7: Helping Transform a Field Towards Sustainability
Cascade C (Mezzanine Level)

6:00 p.m. – 8:00 p.m. | Welcome Reception

 Reception at the Bill & Melinda Gates Foundation








TUESDAY, MARCH 13, 2012

Registration is open 7:30 a.m. – 5:15 p.m. in Grand Foyer.


8:30 a.m. – 10:00 a.m. | Breakfast Plenary Session

Imagine: How Creativity Works
Grand II and III (Grand Level)
(Breakfast buffet available starting at 8:00 a.m.)

10:15 a.m. – 11:45 a.m. | Breakout Sessions Round B

-  B1: Changing Our Mindset for Collective Impact
Fifth Avenue (Grand Level)
-  B2: Supporting Grantee Financial Sustainability and Growth
Cascade AB (Mezzanine Level)
-  B3: A New Media and Tech Tools Session for Non-Techies
Grand I (Grand Level)
-  B4: The Key to Advancing Change is Building
an Effective Network
Cascade II (Mezzanine Level)
-  B5: Strength and Sustainability in Nurse-Family Partnership
Cascade C (Mezzanine Level)
-  B6: Embrace Complexity! Practical Evaluation
in Complex Communities
Vashon (San Juan Level)
-  B7: Incorporating Beneficiary Perspectives Into Foundation
Decision-Making
St. Helens (Mezzanine Level)

12:00 p.m. – 1:15 p.m. | Networking Lunch

 Lunch and Book Signing
Grand II and III (Grand Level)
Social Media Help Desk
Grand Foyer

1:15 p.m. – 3:00 p.m. | Short Talks

Round 1: 1:20 – 1:45

- 1A. Jeff Bradach, The Bridgespan Group
Cascade II (Mezzanine Level)
- 1B. Andy Goodman, The Goodman Center
Grand I (Grand Level)
- 1C. Shirley Sagawa, sagawa/jospin
Fifth Avenue (Grand Level)

Round 2: 2:00 – 2:25

- 2A. Sanjeev Khagram, Innovations for Scaling Impact
Cascade II (Mezzanine Level)
- 2B. John Berdes, Craft3
Grand I (Grand Level)
- 2C. Katherine Fulton, Monitor Institute
Fifth Avenue (Grand Level)

Round 3: 2:40 – 3:00

- 3A. Mary Jean Ryan, Community Center for Education Results
Cascade II (Mezzanine Level)
- 3B. Eugene Eric Kim, Groupaya
Grand I (Grand Level)
- 3C. William Bell, Casey Family Programs
Fifth Avenue (Grand Level)

3:00 p.m. – 3:30 p.m. | Break

3:30 p.m. – 5:00 p.m. | Facilitated Conversations

Grand II and Grand III (Grand Level)

3:30 p.m. – 6:00 p.m. | Site Visits to Local Nonprofits

Off-site

6:00 p.m. – 8:30 p.m. | Dine-Arounds

 *Off-site*

CONTINUED...

SCHEDULE AT A GLANCE








WEDNESDAY, MARCH 14, 2012

Registration is open 7:00 a.m. – 3:00 p.m. in Grand Foyer.


8:00 a.m. – 9:00 a.m. | Continental Breakfast

 Grand II and III (Grand Level)

9:00 a.m. – 10:30 a.m. | Conference Breakout Sessions Round C

-  C1: Collaboration is Hot in Cleveland
St. Helens (Mezzanine Level)
-  C2: The Hard Truth About Strategic Learning in Five Minutes
Vashon (San Juan Level)
-  C3: Multi-Level Grantmaking:
Creating an Environment for Sustainability
Cascade AB (Mezzanine Level)
-  C4: Soaring Successes and Fantastic Failures of Mission
Investing (CEO Roundtable)
Cascade II (Mezzanine Level)
-  C5: Using Networks to Go to Scale
Fifth Ave (Grand Level)
-  C6: 360 Degree Problem-Solving by Working Together
Grand I (Grand Level)
-  C7: Building the Capacity of Capacity Builders
Cascade C (Mezzanine Level)

11:00 a.m. – 12:30 p.m. | Conference Breakout Sessions Round D

-  D1: Reinventing Evaluation for Social Innovation and Change
Grand I (Grand Level)
-  D2: Building Community Capacity for a Healthy Nonprofit
Ecosystem
Vashon (San Juan Level)
-  D3: Leadership and Learning: Two Sides of the Same Coin
Cascade AB (Mezzanine Level)
-  D4: Boundary Spanning Leadership
St. Helens (Mezzanine Level)
-  D5: Can't We All Play Nice? Reducing Government
Barriers to Working with Nonprofits
Cascade II (Mezzanine Level)
-  D6: Applying Seven Proven Levers to Scale Impact
Fifth Avenue (Grand Level)
-  D7: Strategies to Engage Nonprofit Leaders in Design
and Implementation
Cascade C (Mezzanine Level)

1:00 p.m. – 2:30 p.m. | Closing Plenary Luncheon

A Movement Builder's Perspective on How Grantmakers
Can Grow Impact
Grand II and III (Grand Level)

AMBASSADOR PROGRAM

GEO conferences create lasting connections that strengthen grantmakers' work and build community. GEO's Ambassador Program facilitates and deepens both first-time and seasoned participants' networking experiences. Folks that are new to GEO are making the most of the conference by tapping the knowledge of a seasoned GEO conference participant. *If you're new to GEO or this conference and have questions, feel free to ask anyone with an Ambassador label on their name tag — they are happy to help!*

BOOK SIGNING

Darell Hammond will sign copies of his new book, *KaBOOM! How One Man Built a Movement to Save Play*, in Grand II and III during the networking lunch.

PHOTO BOOTH

Visit the photo booth during the Welcome Reception to capture your reactions to grantmaking faux pas or share any commitments to changes in practice you would like to make when you get home.

GEO MEMBER LOUNGE

Looking for a quiet spot to connect with others in our community?

Find your peers in the Member Lounge located in the Grand Crescent (Grand Level, near the registration foyer).

The Member Lounge is open:

- Monday (8:00 a.m. – 5:00 p.m.)
- Tuesday (7:30 a.m. – 5:15 p.m.)
- Wednesday (7:00 a.m. – 1:00 p.m.)

SUNDAY MARCH 11

MONDAY MARCH 12

5:00 p.m. – 7:00 p.m.

Meet and Greet

Westin Lobby Bar

Get a head start on your networking by connecting with colleagues before the conference begins. Meet members of GEO's membership, host and planning committees at this informal meet and greet held at the lobby bar in the Westin. The only cost to you is the price of your dinner or drinks.

9:00 a.m. – 12:00 p.m.

Pre-Conference Workshops

(Breakfast is on your own)

W1: Getting to Know the GEO Community (10:00 a.m. - 11:30 a.m.)

Grand I (Grand Level)

*Session Designer: Jason Twiss,
Grantmakers for Effective Organizations*

GEO is a vibrant community of approximately 370 grantmakers focused on smarter grantmaking, stronger nonprofits and better results. Where does your organization fit in? Kick off your conference experience by attending this session where participants will learn more about GEO's philosophy, our agenda for change and how we support the work of our members. Through networking and interactive discussion, you will meet like-minded peers and share common questions and challenges you're encountering in your work. 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 learn more about what GEO and the conference have to offer.

Speakers:

*Jason Twiss, Grantmakers for Effective Organizations
J McCray, Grantmakers for Effective Organizations*

W2: Designing Pathways to Collaborative Impact

Vashon (San Juan Level)

*Session Designer: Marianne Hughes, Interaction Institute
for Social Change*






In a complex world, where problems are not well defined and solutions not clear, a more innovative and collaborative approach to problem-solving is required. It is essential that we build capacity to see the whole of the problem, and that we design and facilitate processes that build alignment around shared vision and commitment to collective action. Grantmakers are increasingly stepping into their roles as convenors of collaborative problem-solving initiatives. IISC's Pathway to Change is a collaborative problem-solving framework that helps grantmakers and others conduct stakeholder analyses to determine who needs to be engaged, host conversations to create alignment and design roadmaps to move their efforts forward. During this session participants will reflect on examples where funders have successfully used this methodology and will apply the Pathway framework to a current work situation and learn the frameworks and tools needed to design and facilitate collaborative change.

Advanced registration is required.

Speaker:

Marianne Hughes, Interaction Institute for Social Change

LEGEND

-  SUPPORTING EFFECTIVENESS
-  EVALUATION AND LEARNING
-  COLLABORATIVE PROBLEM-SOLVING
-  SCALING IMPACT
-  NETWORKING

For more details about session tracks, see page 2.

GEO CONFERENCES ARE PAPER-LITE

In an effort to be responsible toward our environment and increase the quality of our resources, GEO has limited the printed materials we provide on-site. GEO will not provide printed copies of speaker resources, speaker bios or the attendee roster. These resources are available electronically through our website at www.GEONationalConference.org.

MONDAY MARCH 12

🕒 W3: Building Capacity for Evaluation and Learning

St. Helens (Mezzanine Level)

*Session Designer: Jessica Wechter,
Grantmakers for Effective Organizations*

High-performing nonprofit organizations seek and use data and feedback to continually assess and improve their work. And, behind these efforts are supportive grantmakers who embrace the role they can play in helping grantees make effective use of information. These grantmakers acknowledge that before nonprofits can expand their impact, they must understand what works. They also realize that a prerequisite to identifying what is working in their own philanthropic efforts is helping grantees learn what is working for them on the ground. This workshop is based on a curriculum developed in 2011 by Innovation Network, in partnership with GEO's *Scaling What Works* initiative, to help grantmakers support nonprofits in their efforts to evaluate, learn and grow impact. Participants will discuss evaluation readiness, culture and practice on the behalf of grantmaker and grantees, and explore approaches and tools for building evaluation capacity. **Advanced registration is required.**

Speakers:

*Johanna Morariu, Innovation Network
Ehren Reed, Innovation Network*

🕒 W4: Scaling Impact: The Grantmakers' Role (10:00 a.m. - 12:00 p.m.)

Fifth Avenue (Grand Level)

*Session Designer: Emily Wexler,
Grantmakers for Effective Organizations*

There is significant research on the nonprofit life-cycle and also a growing body of evidence about key practices that enable high performing nonprofits to scale their impact. However, there is far less information regarding the role of grantmakers in supporting these nonprofits — and existing information often contradicts how traditional philanthropy operates. As a result, GEO initiated a collaborative research effort with Taproot Foundation, Ashoka, TCC Group and Social Impact Exchange to identify the parallel practices and actionable tools that grantmakers can use to support nonprofits as they move through periods of transition in their organizational life and grow their impact. Attend this interactive session to get a sneak peek at early insights emerging from the research and engage with other attendees about how it applies to your own work.

This discussion-based session is free to all conference attendees, but advanced registration is required.

Speakers:

*Meghan Duffy, Grantmakers for Effective Organizations
Nancy Murphy, Grantmakers for Effective Organizations*



1:00 p.m. – 3:00 p.m. Opening Plenary Luncheon — How Not to Grant

Grand II and III (Grand Level)

Today's target: a grantmaking organization that has more good intentions than good practices. Hosts Stacy and Clinton share some grantmaking do's and don'ts to keep your organization relevant, effective and stylish.

Featuring:

- *Opening Remarks from Handy Lindsey, The Cameron Foundation, and Suzanne Walsh, Bill & Melinda Gates Foundation*
- *Facilitated by Albert Ruesga, Greater New Orleans Foundation, and Andrew McMasters, Wing It Productions*
- *Actors from Jet City Improv (no nonprofit practitioners were harmed in the making of this session)*

3:30 p.m. – 5:00 p.m. Breakout Sessions Round A

🕒 A1: Six Ways Donors Catalyze Results

Grand I (Grand Level)

*Session Designer: Leslie Crutchfield,
author of Forces for Good and Do More Than Give*

In their newest book, *Do More Than Give: The Six Practices of Donors Who Change the World*, authors Leslie Crutchfield, John Kania and Mark Kramer offer a set of "catalytic practices" grantmakers can adopt for greater impact, including asking grantees what they need, supporting networks and advocating for policy change. Attendees at this session will learn how a variety of foundations have successfully catalyzed change and receive nuts-and-bolts advice from peer practitioners about the benefits and trade-offs inherent in taking a more catalytic approach.

Speakers:

*John Kania, FSG
Emily Tow Jackson, The Tow Foundation
David Wertheimer, Bill & Melinda Gates Foundation*

MONDAY MARCH 12

A2: Leveraging the Collective Power of Board Advocacy

Vashon (San Juan Level)

Session Designer: Sonya Champion, Champion Foundation

The nonprofit sector's health and vitality requires a vibrant public-private partnership, but few boards truly understand and advocate for the public sector support needed to achieve their mission. The 10 – 20 million board members leading the 1.4 million nonprofits in the U.S. could do more to support the crucial public policy and advocacy needs of our sector. The Board Advocacy Project in Washington seeks to build awareness of the importance of public policy and advocacy work among board members of homelessness and affordable housing organizations. Join a dynamic, facilitated discussion on the sector's most current advocacy issues and explore whether board advocacy should be considered a requirement of good governance.

Speakers:

Diana Aviv, Independent Sector

Sonya Champion, Champion Foundation

Kollin Min, Bill & Melinda Gates Foundation

A3: Learning in Public

Cascade II (Mezzanine Level)

Session Designer: Kathy Reich, The David and Lucile Packard Foundation

Foundations spend millions of dollars each year on evaluation and learning activities, yet they rarely make evaluation results public. And often foundations make decisions based on these results without consulting key stakeholders or asking for their help in interpreting evaluation findings. There is an alternate approach emerging: sharing what an organization learns while it is in the process of learning — “learning in public.” Using the David and Lucile Packard Foundation's Organizational Effectiveness program evaluation as an example, this session will examine the emerging practice of conducting evaluation activities in a public space — online and in real time, to maximize feedback from stakeholders and benefit not just an individual foundation's work, but the field as a whole.

Speakers:

Beth Kanter, Zoetica

Jared Raynor, TCC Group

Kathy Reich, The David and Lucile Packard Foundation

A4: Lessons from the Field on the Finance of Scaling

Fifth Avenue (Grand Level)

Session Designer: David Greco, Nonprofit Finance Fund

As philanthropy tries to respond to the massive cuts in government funding and continuing economic uncertainty, it is clear that foundations will not be able to make up the funding shortfalls. Consequently, the need now is to explore ways to deploy limited resources more effectively. As grantmakers look for ways to increase impact, what are some of the challenges — both culturally and operationally — that can stymie change? This session will explore some innovative ideas and real-world lessons from grantmakers who are changing their grantmaking practices and making a difference.

Speakers:

Keavy Cook, The Ford Family Foundation

David Greco, Nonprofit Finance Fund

A5: Intertwining Services Funding with Policy Initiatives to Achieve Systems Change

Cascade AB (Mezzanine Level)

Session Designer: Lynda Frost, Hogg Foundation for Mental Health

Grantmakers looking to increase their impact are increasingly funding or even initiating policy work. Too often these policy initiatives are separate from services funding. Yet comprehensive interventions with a base of services funding and policy work at a number of levels provide the opportunity for foundations to not only advance their own goals, but also to build and advance the work of the larger field of organizations coalescing around a common goal. This session explores three integrated health care initiatives (from Maine, Texas, and California) that combine services funding and policy work in an effort to achieve true systems change. Participants will explore specific policy tools and techniques, assess the potential and challenges of these tools and work in small groups in applying this approach to new issue areas of interest.

Speakers:

Lynda Frost, Hogg Foundation for Mental Health

Becky Hayes Boober, Maine Health Access Foundation

Karen Linkins, Desert Vista Consulting

 SUPPORTING EFFECTIVENESS

 EVALUATION AND LEARNING

 COLLABORATIVE PROBLEM-SOLVING

 SCALING IMPACT

 NETWORKING

MONDAY MARCH 12

💰 A6: Supporting Washington's Nonprofit Ecosystem

St. Helens (Mezzanine Level)

Session Designer: Sally Gillis, Social Venture Partners Seattle

In the fall of 2009, seven grantmakers came together to fund a study on capacity building in Washington state that explored the needs of communities, identified gaps in capacity and recommended strategies for strengthening the local nonprofit community. In order to ensure action on the recommendations, the group came together again to form the Statewide Capacity Collaborative, an effort to coordinate collective and individual capacity-building strategies focused on helping move real, systemic change for nonprofits across the state. Through conversations with a panel of grantmakers involved in the effort and small group conversations, participants will gain understanding of the essential elements of a healthy nonprofit ecosystem and brainstorm ways to bring key elements back to their own communities.

Speakers:

Jennifer Bright, Social Market Strategies

George "Jock" Edwards, Sherwood Trust

Melanie Matthews, Champion Foundation

Paul Shoemaker, Social Venture Partners Seattle

💰 A7: Helping Transform a Field Towards Sustainability

Cascade C (Mezzanine Level)

*Session Designer: Brenda L. Solórzano,
Blue Shield of California Foundation*

In order for a nonprofit community to achieve long-term sustainability more than just money is required — leadership, self-assessment, peer networks, engagement in policy activities, adaptability and a learning culture are also essential. Blue Shield of California Foundation has been working to build the long-term sustainability of community clinics and domestic violence providers in California, individually and as fields. Their approach has included providing core support grants, developing leadership programs tailored to grantee needs and providing complimentary capacity-building support. Through this session, participants will hear from foundation program staff and grantees, dig deeper into the comprehensive strategies used and the multifaceted role it has played, and explore lessons in helping these two distinct fields work towards long-term sustainability.

Speakers:

Bess Bendet, Blue Shield of California Foundation

Marty Lynch, LifeLong Medical Care

Brenda L. Solórzano, Blue Shield of California Foundation

Nilda Valmores, My Sister's House

💰 SUPPORTING EFFECTIVENESS

🔄 EVALUATION AND LEARNING

🤝 COLLABORATIVE PROBLEM-SOLVING

📈 SCALING IMPACT

👥 NETWORKING

6:00 p.m. – 8:00 p.m.

👥 Welcome Reception at the Bill & Melinda Gates Foundation

co-hosted by the Bill & Melinda Gates Foundation



The GEO Conference Host Committee welcomes you to Seattle, as we kick off the National Conference at the new Bill & Melinda Gates Foundation campus — across from the Seattle Center in the heart of the city. Join us for an evening of networking, conversation and light refreshments with the Seattle Space Needle as the backdrop.

The reception will feature opening remarks from Bill Gates Sr., co-chair of the Bill & Melinda Gates Foundation, and live entertainment provided by Gansango Music and Dance and the world renowned Garfield High School Jazz Combo.

Want to learn more about the Gates family, the foundation staff and the individuals who have been touched by the foundation's work? Take a self-guided tour of the foundation's brand new Visitor's Center between 6:40 p.m. and 8:00 p.m.

For those wishing to explore the Seattle Monorail system, GEO staff members will be leaving from the hotel lobby beginning at 5:30 p.m. Complimentary Monorail tickets will be available at the registration desk on Monday, March 12. Shuttle bus service is also available; with the first bus departing the Westin at 5:45 p.m. Return service to the Westin will begin at 8:15 p.m.

***Don't forget to wear your conference badge
and bring your photo ID!***

***Only conference attendees and their pre-registered
guests will be allowed to enter.***

TUESDAY MARCH 13

8:30 a.m. – 10:00 a.m. Breakfast Plenary Session — Imagine: How Creativity Works

Grand II and III (Grand Level)

Did you know that the most creative companies have centralized bathrooms? That brainstorming meetings are a terrible idea? That the color blue can help you double your creative output? From the bestselling author of *How We Decide* comes a sparkling and revelatory look at the new science of creativity. Shattering the myth of muses, higher powers, even creative “types,” Jonah Lehrer demonstrates that creativity is not a single “gift” possessed by the lucky few. It’s a variety of distinct thought processes that we can all learn to use more effectively. Lehrer reveals the importance of embracing the rut, thinking like a child, and daydreaming productively, then he takes us out of our own heads to show how we can make our neighborhoods more vibrant, our organizations more productive, and our schools more effective.

*Featuring an introduction from
Sonya Campion, Campion Foundation*

Speaker:



Jonah Lehrer, author of
Imagine: How Creativity Works

10:15 a.m. – 11:45 a.m. Breakout Sessions Round B

B1: Changing Our Mindset for Collective Impact

Fifth Avenue (Grand Level)

*Session Designer: Ken Thompson,
Bill & Melinda Gates Foundation*

As our understanding of what it means to collaboratively create large-scale social change matures, grantmakers’ approach to problem-solving must evolve. For example, grantmakers need to share power with other stakeholders rather than having direct control over goals and approaches, support an ecosystem of actors rather than individual nonprofits, and reward alignment and systemic results rather than individual efforts. Through a series of small group activities, discussion with funders participating in collective impact and findings from new research on this topic, participants will dive deep into the experience of funding collective impact, understand the tensions and challenges faced in funding these efforts and discuss ways to embrace the mindset changes needed to be an effective collective impact funder.

Speakers:

Fay Hanleybrown, FSG

Ken Thompson, Bill & Melinda Gates Foundation

B2: Supporting Grantee Financial Sustainability and Growth

Cascade AB (Mezzanine Level)

Session Designer: Liz London, The Bridgespan Group

Despite the aspirations many grantmakers have of doing “big” things with their grants, in reality their dollars occupy a small share of the funds behind the largest nonprofit success stories. One of the most common and important challenges we encounter is how to have a lasting positive effect on grantees’ financial sustainability and growth despite the time-delimited nature of our direct support. Far too often, grantees exit a grantmaker’s portfolio in the same or worse financial shape as when they entered it. To get the most bang for our buck, foundations need to take grantees’ funding pursuits as seriously as their programmatic pursuits. This session will offer participants concrete guidance on how they can better support the financial sustainability of their grantees and amplify the impact of their investments during the grant period as well as in the years that follow.

Speakers:

Peter Kim, The Bridgespan Group

Susan Wolf Ditkoff, The Bridgespan Group

B3: A New Media and Tech Tools Session for Non-Techies

Grand I (Grand Level)

Session Designer: Jeff Perlstein, ZeroDivide

Communities and organizations are using low-cost technologies to amplify their social impact and engage stakeholders in dynamic ways. In addition to these programmatic results, many organizations are making savvy use of new technologies to significantly increase their operational efficiency. ZeroDivide’s recent research shows that while funders are highly curious about the opportunities presented by new technology tools, they generally lack expertise in this realm and are unclear about effective funding strategies to support their grantees in this work. Join funder colleagues and leading topical experts in an engaging conversation to dig deeper and learn more about successful grantmaking approaches that have enhanced nonprofits’ sustainability and program delivery with appropriate technology solutions.

Speakers:

Laura Efurd, ZeroDivide

Sidney Hargro, Community Foundation of South Jersey

Jane Meseck, Microsoft

TUESDAY MARCH 13

B4: The Key to Advancing Change is Building an Effective Network

Cascade II (Mezzanine Level)

Session Designer: Jane Donahue, Deaconess Foundation

Lately, there's been a lot of buzz about networks and the benefits of collective efforts. While the tenets of networked action are compelling, lessons are just emerging about what it takes to initiate and sustain a successful network and what role funders play in this new landscape. This session will feature the work of two thriving networks: the St. Louis Regional College Access Network, a consortium of nonprofit providers, educators, funders and businesses; and Intersect for Ability, a foundation-initiated effort that includes 11 Chicago-area nonprofits serving individuals with developmental disabilities. Deaconess and Coleman Foundations — the lead foundations in these efforts — will lead participants in an exploration of the processes and practices needed to move from the initial concept of a network to the brass tacks of aligned service delivery among nonprofit providers.

Speakers:

Jane Donahue, Deaconess Foundation

Clark McCain, Coleman Foundation

Allison Williams, Wyman Center

B5: Strength and Sustainability in Nurse-Family Partnership

Cascade C (Mezzanine Level)

Session Designer: Thomas Jenkins, Nurse-Family Partnership

At a certain developmental point, neither philanthropy nor government alone can succeed in taking effective programs to scale given our finite resources. By combining program implementation expertise, start-up funding, community organizing and policy work at multiple levels of government, the Edna McConnell Clark Foundation and its co-investors were able to enlist government support and sustainably scale the Nurse-Family Partnership program to high-need communities in the Carolinas and nationwide. Session participants will explore lessons from the NFP example and share practical ideas about the design of collaborative ventures and how funders can effectively join forces to successfully scale programs.

Speakers:

Thomas Jenkins, Nurse-Family Partnership

Tina Markanda, The Duke Endowment

Woody McCutchen, The Edna McConnell Clark Foundation

B6: Embrace Complexity! Practical Evaluation in Complex Communities

Vashon (San Juan Level)

Session Designer: Jessica Bearman, Bearman Consulting

Foundations and government funding agencies are increasingly interested in funding comprehensive community initiatives or place-based work — and measuring its impact. But how do you evaluate such complex efforts in ways that are meaningful for communities and funders alike? GEO has convened a year-long community of practice, bringing together private foundations and federal grantmakers and evaluators, to tackle this question. During this lively session, speakers and participants will explore the top challenges inherent in evaluating place-based grantmaking — and discuss practical strategies that have worked to engage communities and colleagues, share data and results and embrace the complexity of real world efforts. They will also reflect on the benefits and challenges of taking part in a cross-sector learning community.

Speakers:

Jessica Bearman, Bearman Consulting

Marie Colombo, The Skillman Foundation

Sarah Zevin, Department of Education

B7: Incorporating Beneficiary Perspectives Into Foundation Decision-Making

St. Helens (Mezzanine Level)

Session Designer: Rhonnel Sotelo, Stuart Foundation

The idea that grantmakers can learn and improve by listening to the ultimate stakeholders of our work sounds simple and is hardly radical. But, there are very few examples of funders rigorously collecting feedback from the intended beneficiaries of their grantmaking in order to inform their thinking about funding strategies — and how they might be improved. Research by the Center for Effective Philanthropy has shown that funders who collect beneficiary feedback report that they have a better understanding of how their strategies are actually working and a more accurate understanding of the impact of their grantmaking compared to funders who don't collect such feedback. During this interactive session, participants will explore two diverse approaches for incorporating beneficiary perspectives and spend time debating the applicability and lessons learned from both of these efforts for their own work.

Speakers:

Stephany Bryan, Hogg Foundation for Mental Health

Valerie Threlfall, Center for Effective Philanthropy's

YouthTruth Initiative

 SUPPORTING EFFECTIVENESS

 EVALUATION AND LEARNING

 COLLABORATIVE PROBLEM-SOLVING

 SCALING IMPACT

 NETWORKING

TUESDAY MARCH 13

12:00 p.m. – 1:15 p.m.

Networking Lunch

Grand II and III (Grand Level)

Grab a boxed lunch and a table to continue your conference conversations with colleagues.

After lunch, get your signed copy of *KaBOOM! How One Man Built a Movement to Save Play* by Darell Hammond.

1:15 p.m. – 3:00 p.m.

Short Talks

In a new format, GEO will host the following series of short presentations from leaders within and outside of philanthropy on provocative, innovative or challenging ideas. Short talks are followed by facilitated conversations, where you can ask your burning questions or dive deeper on topics presented during short talks.

TIME SLOT	CASCADE II (MEZZANINE LEVEL)	GRAND I (GRAND LEVEL)	FIFTH AVENUE (GRAND LEVEL)
Round 1: 1:20 - 1:45	Jeff Bradach	Andy Goodman	Shirley Sagawa
Round 2: 2:00 - 2:25	Sanjeev Khagram	John Berdes	Katherine Fulton
Round 3: 2:40 - 3:00	Mary Jean Ryan	Eugene Kim	William Bell

1A. Cracking the Code on Scale in a World of Declining Resources

Cascade II (Mezzanine Level)

What's wrong with this picture: we have a growing body of knowledge about what works — to help first time teen-age mothers and their children lead better lives, to help homeless people get off the streets for good, to achieve significant increases in academic performance among the most disadvantaged kids. And yet the number of people in need of these solutions is growing faster than the number who can take advantage of them. This situation is made all the more dire by the massive cuts in government spending that are upon us. If proven programs are to reach the growing number of people who need them at a time when resources are increasingly constrained, we will need to abandon our twentieth century mindsets about funding and scale, and build a true constituency for what works.

Speaker:

Jeff Bradach, The Bridgespan Group



1B. How We Decide: Computers vs. Filters

Grand I (Grand Level)

Sometimes your brain functions like a computer, taking in information, carefully evaluating it and objectively arriving at a decision. But other times it works more like a filter, with emotions and stories dictating which facts will be let in and which will be ignored. When you want to influence the decision-making of a particular audience, it's worth knowing how they will respond — computer or filter — and Andy Goodman will review some fascinating brain science research that will help you know what to expect the next time you reach out.

Speaker:

Andy Goodman, The Goodman Center



1C. The Role of National Service and Volunteers in Advancing Social Change

Fifth Avenue (Grand Level)

While we struggle to address complex social problems at a time of economic challenge, a critical and cost-effective part of the solution is poised and ready, argues Shirley Sagawa in her new book, *The American Way to Change*. Volunteering is on the rise, and there is every reason to believe that more people would serve if only they were asked. Unfortunately, service — by volunteers and national service participants — is often left out of the public problem-solving tool box. It is time to get serious about solving the problems that are holding us back as a nation by making it possible for ordinary citizens to play a part. Sagawa will offer suggestions of how we can manage this important labor force effectively and what grantmakers can do to help leverage the true potential of volunteers.

Speaker:

Shirley Sagawa, sagawa/jospin



2A. Innovations for Scaling Impact: What Have We Learned and Where Do We Go Now?

Cascade II (Mezzanine Level)

Going to scale is a priority of stakeholders across public and private sectors around the world. It is an increasing focus of grantmakers in the U.S. and abroad. Have we learned anything about scale over the past several years? What good practices beyond program replication or organizational growth have emerged to scale impact? Sanjeev Khagram will argue that the time is ripe for foundations to catalyze a field wide collaborative research, development and continuous improvement system that can drive innovations for scaling impact.

Speaker:

Sanjeev Khagram, Innovations for Scaling Impact



TUESDAY MARCH 13

2B. From Risk to Reward: A CDFI's Approach to Risk in Lending

Grand I (Grand Level)

In a time when most traditional financial institutions are restricting their lending practices, Craft3, formerly known as Enterprise Cascadia, manages a loan portfolio of \$140 million, and these loans primarily go to individuals and organizations that would not be eligible for a loan from a bank. The community development financial institution has a loan delinquency rate of less than 2.5 percent — results unheard of in today's recession. By embracing risk in lending, Craft3 has been able to provide much-needed financing to businesses and nonprofits that in turn help the CDFI advance its mission to create economic equity and a healthy environment in rural and urban communities in Oregon and Washington. John Berdes, president and CEO, will share the organization's philosophy behind lending, how they assess impact and what grantmakers can learn from this model.

Speaker:



John Berdes, Craft3

2C. Growing Social Impact in a Networked World

Fifth Avenue (Grand Level)

Foundations and their grantee partners are facing huge challenges every day. Wicked social and environmental problems are constantly changing and seemingly intractable. In order to make progress, social change makers can — and need to — act in ways that are larger than themselves. This means building resilient networks in addition to strong organizations. In this session, Katherine Fulton will describe the changing context in which we are working and explore ways grantmakers can grow impact by tapping the power of networks.

Speaker:



Katherine Fulton, Monitor Institute

- SUPPORTING EFFECTIVENESS
- EVALUATION AND LEARNING
- COLLABORATIVE PROBLEM-SOLVING
- SCALING IMPACT
- NETWORKING

3A. How to Make "Collective Impact" a Reality: A Perspective from the Front Lines

Cascade II (Mezzanine Level)

In 2010, Mary Jean Ryan founded the Community Center for Education Results, which is staffing the regional collective impact initiative called The Road Map Project. The Project is aimed at getting dramatic improvement in student achievement — cradle through college/career in South Seattle and South King County. As the work has advanced over the past two years — and as interest in the notion of "collective impact" has grown in the field — Ryan has noticed the many different important roles a grantmaker can play in this type of approach. Hear Ryan's perspective on the power that funders have in catalyzing collective approaches and why, now more than ever, grantmakers need to be bold and embrace new ways of working.

Speaker:



Mary Jean Ryan,
Community Center for Education Results

3B. From "Funders" to Changemakers

Grand I (Grand Level)

Foundations gave about \$40 billion to U.S. charitable organizations in 2010, a non-trivial amount to be sure, but only 13 percent of charitable giving overall and an even smaller percentage of funds needed to solve our most difficult problems. If we really care about maximizing our impact, then we need to shift our mindsets from foundations as "funders" to foundations as "changemakers." What strengths are we underleveraging or, worse, impeding? How can we realistically shift our mindsets and behaviors so that we can make a bigger impact on the world?

Speaker:



Eugene Eric Kim, Groupaya

3C. Grantmakers' Role in Advancing Policy: Lessons from Casey Family Programs

Fifth Avenue (Grand Level)

As an operating foundation, Casey Family Programs provides direct services to children and families, systems improvement consultation and research, and educates policymakers on the needs of children and families in the foster care system. To facilitate its work, the foundation, among other things, recognizes the need for improvements in federal child welfare finance. Through its work with jurisdictions in all 50 states, Washington, D.C., Puerto Rico and federal agencies, the foundation has had made some significant achievements advancing its public policy agenda. Dr. William C. Bell, president and CEO of Casey Family Programs, will share stories of the foundation's success and offer suggestions for grantmakers working to advance policy agendas.

Speaker:



William Bell, Casey Family Programs

TUESDAY MARCH 13

3:00 p.m. – 3:30 p.m. Break

3:30 p.m. – 5:00 p.m. Facilitated Conversations

We've heard from you that one of the greatest benefits of GEO conferences is being able to connect with a community of like-minded colleagues. During this session you can:

- **Continue a conversation with a short talk speaker:**
 - Mary Jean Ryan, Community Center for Education Results *Cascade II (Mezzanine Level)*
 - Eugene Eric Kim, Groupaya *Grand I (Grand Level)*
 - William Bell, Casey Family Programs *Fifth Avenue (Grand Level)*
 - Jeff Bradach, The Bridgespan Group *Grand II and III (Grand Level)*
 - Andy Goodman, The Goodman Center *Grand II and III (Grand Level)*
 - Sanjeev Khagram, Innovations for Scaling Impact *Grand II and III (Grand Level)*
 - John Berdes, Craft3 *Grand II and III (Grand Level)*
 - Katherine Fulton, Monitor Institute *Grand II and III (Grand Level)*
 - Shirley Sagawa, sagawa/jospin *Grand II and III (Grand Level)*
- **Form or join a small group discussion to explore a shared topic of interest. Head to *Grand II and III* to join one of the conversations listed below or to see what other options are available. If you want to host a facilitated conversation, please add your name and topic to the list in the registration area by 1:00 p.m. on Tuesday.**
 - Answers to Your GEO Membership Questions — Jason Twiss and Laurel Ahrnsbrak, Grantmakers for Effective Organizations
 - Capacity Building in Transition — Annie Hernandez, The Lumpkin Family Foundation
 - Thinking Bigger About Advocacy: Building Field-Level Capacity — Deborah Schachter, New Hampshire Charitable Foundation, and Nancy Csuti, The Colorado Trust
- **Meet with the colleagues you were hoping to see at the conference to discuss a topic of your choice.** *Grand II and III (Grand Level)*

3:30 p.m. – 6:00 p.m. Site Visits to Local Nonprofits

See page 14 –15 for details.

6:00 p.m. – 8:30 p.m.

Dine-Arounds

Off-site

Join a group of your colleagues for an informal, participant-led conversation over uniquely fresh Pacific Northwest culinary delights at a local establishment. The only cost to you is the price of your dinner, at a reasonably priced restaurant located within walking distance of the hotel. Interested in participating or hosting a dine-around? You can view location options and sign-up to join or host a group in the registration area. *Diners should meet in the lobby area for a departure time of 6:00 p.m.*

Dining options:

Black Bottle

A casual tavern committed to great eating and drinking at fair prices. Every dish is made fresh-to-order using local and sustainable ingredients whenever possible. (\$\$)

BlueAcre Seafood

A quintessential American seafood restaurant drawing upon the vast array of wild seafood available from the United States coastal waters as well as carefully chosen sustainably-farmed freshwater species, oysters, clams and mussels. (\$\$\$)

Lola

A Tom Douglas restaurant featuring modern Mediterranean and North African cuisine with a homemade flare featuring local ingredients. (\$\$\$)

The Pink Door

Situated in the quaint post alley of Seattle's Pike place market, Pink Door is dedicated to fresh and local Italian-American food since 1981, providing a warm, lively respite from the ordinary world. (\$\$)

Umisake House

A unique Japanese cuisine restaurant in the Belltown area of Seattle featuring the highest quality seafood available in the Northwest, a large izakaya-style tapas menu, and boasting a sake list of over 60 imported Japanese bottles. (\$\$)

SITE VISITS

Smarter Grantmaking.
Stronger Nonprofits.
Better Results.



2012 GEO
NATIONAL
CONFERENCE

Tuesday Afternoon Site Visits, 3:30 p.m. – 6:00 p.m.

Participants will return in time for Dine-Arounds.

Nonprofit site visits are a key way in which conference attendees can get a flavor for the work being done in Seattle. The idea is for attendees to be able to take the time to reflect and walk in the shoes of nonprofit leaders, reflect on what they are learning at the conference and put ideas into perspective. Organized by members of the Seattle host committee, these site visits offer an opportunity to explore some of the leading nonprofits in the Seattle area. Learn about the missions, strategies, challenges and accomplishments of these organizations and how they operate within Seattle's innovative philanthropic community.

- Register for site visits at the registration desk in *Grand Foyer*.
- Space is limited, so sign-up early.
- Please arrive promptly at 3:15 p.m.
- Buses for the site visits will depart from the front of the hotel near the valet stand at 3:30 p.m.

Questions?

Contact Andy Freeze at freeze@geofunders.org or visit the registration desk.



LEVERAGING FUNDING FOR MAXIMUM IMPACT

Site: I-LABS

Host: Bill Henningsgaard, SVP Seattle Partner

Combining state-of-the-art brain-imaging technology and the study of behavior, the Institute for Learning & Brain Science (I-LABS) makes groundbreaking discoveries about the developing brain and the importance of the first five years of life and learning. With the support of local philanthropy, I-LABS created a Translation, Outreach and Education (TOE) division to translate scientific research findings in relevant and actionable ways to non-scientific audiences and key stakeholders. TOE also helps shape the policy and practice of early childhood education at the local and national levels by working in collaboration with Thrive by Five Washington (the state's public-private partnership) and other entities to disseminate and frame the findings for these audiences. The site visit to I-LABS will explore how local funders, including Boeing and the Bezos Family Foundation, worked to increase the visibility of I-LABS and expand awareness of the research across the region and nation. Attendees will explore the role funders can play in leveraging relationships, partnerships and investments in complementary initiatives to coordinate efforts.

COMMUNITY REVITALIZATION THROUGH COLLABORATION

Site: High Point

Host: Adrienne Quinn, Medina Foundation

The West Seattle neighborhood of High Point has won more than 20 awards at the local, state, national and international levels. High Point is one of Seattle Housing Authority's redeveloped mixed-income communities (federal HOPE VI program). The neighborhood's old, worn out public housing units have been replaced with new, energy efficient homes, quiet streets and more than 20 acres of open spaces — including parks, playgrounds, and jogging trails. A Seattle Public Library branch and medical and dental clinic are on-site.

Located in the heart of the neighborhood is Neighborhood House's High Point Center, a home for anti-poverty services. Neighborhood House is an organization dedicated to helping people attain self-sufficiency, and the programs they offer include Head Start, Early Head Start, youth tutoring, English as a Second Language classes, job training, adult education and many others. In addition, King County's first low-income credit union, Express, has designated hours at the High Point Center, ensuring that residents have access to fair and affordable banking options.

Come take a tour and hear from public and private leaders who helped make High Point possible.

DYNAMIC ADAPTABILITY

Site: Wing Luke Museum

Host: Jim McDonald, Paul G. Allen Family Foundation

Dynamic Adaptability: Arts and Culture Puget Sound was a series of four conferences for cultural sector leaders sponsored by the Paul G. Allen Family Foundation, The Boeing Company, 4Culture, Seattle Office of Arts & Cultural Affairs and The Seattle Foundation, held in partnership with Philanthropy Northwest and Grantmakers in the Arts. This initiative was a response to a March 2009 study about the effects of the recession on area cultural institutions and their needs at the time. In interviews for that study, cultural leaders asked for more opportunities to gather with colleagues, exchange ideas and learn about ways of managing the rapid changes they were experiencing. This site visit will explore how the PGAFF worked with other Seattle funders to meet the needs of the local arts community. Attendees will hear from grantmakers as well as local cultural leaders whose input was essential in creating the conference series.

ENVIRONMENTAL NONPROFIT CONSOLIDATION

Site: Vance Building

Host: Sam Whiting, The Boeing Company

Since early 2010, several Seattle environmental groups have merged, including Islandwood with Homewaters Project and EarthCorps with Friends of Hylebos. In fact, EarthCorps has now merged four times in the last eight years. The mergers provided both larger agencies, Islandwood and EarthCorps, more program work to draw in a broader base of donors and volunteers. The topic of mergers comes up frequently in the nonprofit sector as funding diminishes and groups often compete for the same resources and serve the same missions. This site visit will explore the role funders can play in nonprofit consolidation and hear from local nonprofit leaders on the benefits of sharing resources. Attendees will visit the historic Vance Building, originally built in 1929 and recently rehabbed to be LEED-certified, which currently houses more than 20 local environmental nonprofits.

WEDNESDAY MARCH 14

8:00 a.m. – 9:00 a.m.

Continental Breakfast

Grand II and III (Grand Level)

9:00 a.m. – 10:30 a.m.

Conference Breakout Sessions Round C

C1: Collaboration is Hot in Cleveland

St. Helens (Mezzanine Level)

*Session Designer: Denise San Antonio Zeman,
Saint Luke's Foundation of Cleveland, Ohio*

In response to requests from local nonprofits for help in learning how to approach collaboration, a group of 17 grantmakers in Cleveland pooled their resources to develop and implement a three-phase project to strengthen human service offerings in their area. In the end, eight nonprofits strategically restructured their operations into four, and a network of consultants was formed to support collaboration efforts. Drawing on the insights of a diverse panel of organizations involved in the collaboration and the conclusions of a written case study, participants will explore what works in supporting nonprofit strategic restructuring from the perspective of funders, nonprofits and consultants.

Speakers:

*Linda D. Johaneck, Domestic Violence and Child Advocacy Center
Amy Morgenstern, Main Stream Enterprises, Inc.
Denise San Antonio Zeman, Saint Luke's Foundation of Cleveland, Ohio
Deborah Vesey, Deaconess Community Foundation*

C2: The Hard Truth About Strategic Learning in Five Minutes

Vashon (San Juan Level)

Session Designer: Tanya Beer, Center for Evaluation Innovation

Many foundations are trying to incorporate strategic learning into their grantmaking strategies, particularly strategic philanthropists who recognize that complex problems require dynamic and transformative solutions. Strategic learning promises that lessons that emerge from evaluation and other data sources will be timely, actionable, and forward-looking, and that strategists will gain insights that help them make their next move in a way that increases their likelihood of success. As a concept, strategic learning is an easy sell. But as a real-life practice, it is much messier and more complicated. Our session will reveal the hard truths and the hidden successes about trying to achieve strategic learning in real-life practice. A fast-paced, innovative storytelling format will force 10 presenters, including grantees, program staff, and evaluators, to focus their experience into usable kernels of wisdom and unexpected insight.

Facilitator:

Tanya Beer, Center for Evaluation Innovation

C3: Multi-Level Grantmaking: Creating an Environment for Sustainability

Cascade AB (Mezzanine Level)

*Session Designer: John Summers,
Fiscal Management Associates, LLC*

Capacity-building grants often focus only at the organizational staff level, without much attention to the institutional and external environments in which staff operate and which fundamentally affects whether capacity gains in fact lead to organizational sustainability and mission success. This session will explore the efforts of the Wallace Foundation's Strengthening Financial Management initiative in Chicago to work at both the micro (staff and institutional) and macro (government policy, regulatory environment) levels to address the challenges nonprofits face in their financial and business management. Participants will delve into the successes and challenges of integrating micro- and macro-level approaches and consider ways to promote the sustainability of the organizations they support.

Speakers:

*Nancy Devine, The Wallace Foundation
Valerie Lies, Donors Forum
Hilda Polanco, Fiscal Management Associates, LLC*

C4: Soaring Successes and Fantastic Failures of Mission Investing (CEO Roundtable)

Cascade II (Mezzanine Level)

Session Designer: Peter Berliner, PRI Makers Network

Moving established organizations from traditional philanthropy into new ways of doing business can be exciting and challenging. Grantmaking investments made in the pursuit of both financial and social returns can provide broader impact than grantmaking alone, but there is no one way to do this type of investing. Through this moderated discussion, battle-tested foundation leaders will share their successes, failures and adventures in building mission investing programs. Hear about how they decided to use investment strategies to accomplish philanthropic objectives, addressed tough issues such as resource allocation and risk, and managed the challenge of engaging their trustees, staff, and other key constituents in their journey.

Speakers:

*Peter Berliner, PRI Makers Network
Diane Kaplan, Rasmuson Foundation
Richard Woo, The Russell Family Foundation*

WEDNESDAY MARCH 14

C5: Using Networks to Go to Scale

Fifth Avenue (Grand Level)

Session Designer: Leslye Louie, Civic Ventures

One option for taking great ideas to scale is a network approach, where a nonprofit develops a strong program model and high-quality open-sourced tools that support program creation and operation, financial models, partnerships and evaluation, and then engages partners to replicate the program and adapt it for their communities' unique needs. This session will draw on the experiences of Civic Ventures and its Encore Fellowships Network, which has expanded to six states in less than 18 months using a network approach. Two funders, the Packard Foundation and the California HealthCare Foundation, and Civic Ventures, the creator of the network, will discuss how they've engaged in the network to implement the program in local communities — and the rewards and challenges of taking a networked approach to scaling up a promising program.

Speakers:

Leslye Louie, Civic Ventures

Brian Eule, The David and Lucile Packard Foundation

Melissa Schoen, California HealthCare Foundation

C6: 360 Degree Problem-Solving by Working Together

Grand I (Grand Level)

Session Designer: Anastasia Stathopoulos, REDF

Undertaking collaborative, cross-sector problem-solving is an increasingly popular approach to expanding impact. Federal funding from the Social Innovation Fund, paired with private grantmakers' support, is supporting the replication of New York's successful Center for Employment Opportunities program in other parts of the country. Through an engaging "fish bowl" format, participants will hear and discuss the history and progress of this case example and how it is focusing on funding results, and will explore the ways in which government, grantmakers, intermediaries and nonprofits can work together to solve a problem in the communities they serve.

Speakers:

Carla Javits, REDF

Mindy Tarlow, Center for Employment Opportunities

Charles "Chuck" Harris, The Edna McConnell Clark Foundation

C7: Building the Capacity of Capacity Builders

Cascade C (Mezzanine Level)

Session Designer: Christopher "Kit" Gillem, M.J. Murdock Charitable Trust

An array of organizations across the country provide consulting, training, peer exchange and coaching services to help nonprofits enhance their management and governance. But how can capacity builders enhance their own organizational performance and ensure the delivery of high quality services? Funders can play a key role in supporting these capacity builders to strengthen the effectiveness of the assistance they provide. Hear insights from two seasoned grantmakers about their recent efforts to enhance the capacity-building ecosystems in their regions and explore with your peers how to build quality, sustainable business models for capacity-building service providers.

Speakers:

Fred Ali, Weingart Foundation

Paul Connolly, TCC Group

Christopher "Kit" Gillem, M.J. Murdock Charitable Trust

11:00 a.m. – 12:30 p.m. Conference Breakout Sessions Round D

D1: Reinventing Evaluation for Social Innovation and Change

Grand I (Grand Level)

Session Designer: Hallie Preskill, FSG

Leading grantmakers have been pushing the field to adopt more catalytic and systems-focused approaches to grantmaking. While this transformation is beginning to take hold — as evidenced by an increasing number of funders engaging in advocacy and policy work, cross-sector collaboration and systems change — the sector's approach to evaluation is not keeping pace. It seems funders are still struggling to find an evaluation approach that is well suited for social innovation in complex environments. In this session, participants will engage in learning, reflection and dialogue about "developmental evaluation," the experiences of grantmakers who are implementing the approach in their work and the ways in which it could add value to their current evaluation portfolio.

Speakers:

Mayur Patel, John S. and James L. Knight Foundation

Hallie Preskill, FSG

 SUPPORTING EFFECTIVENESS

 EVALUATION AND LEARNING

 COLLABORATIVE PROBLEM-SOLVING

 SCALING IMPACT

 NETWORKING

WEDNESDAY MARCH 14

D2: Building Community Capacity for a Healthy Nonprofit Ecosystem

Vashon (San Juan Level)

Session Designer: David Landers, Philanthropy Northwest

Community foundations — particularly those serving communities in rural areas — play a distinct and important role in supporting a healthy community. Whether small or large, staffed or unstaffed, community foundations address local challenges by embodying their area's virtues and marshaling resources. During the past year, nine community foundations in Washington state have been part of a new effort reframing how a funder can approach capacity building. Philanthropy Northwest's Community Foundation Initiative provided funding and technical assistance to a variety of community foundations for executing local strategies that ultimately built the capacity of a community, not a single nonprofit. Join us to discuss what community foundations are learning about capacity building, some of the unique opportunities and challenges found in rural areas and how community foundations can be partners with private and public funders in capacity-building efforts.

Speakers:

Barbara Dingfield, The Giving Practice

Lawson Knight, Blue Mountain Community Foundation

Marie Sauter, Bill & Melinda Gates Foundation

Norma Schuiteman, The Community Foundation of South Puget Sound

D3: Leadership and Learning: Two Sides of the Same Coin

Cascade AB (Mezzanine Level)

Session Designer: Marilyn Darling, Fourth Quadrant Partners

Being a learning organization is not easy, but it does not need to be as complicated as we make it. We make learning complicated by seeing it as something separate or something that takes precious time away from the task at hand. By adopting a set of tools and a philosophy about leading, we can strengthen our supervision, leadership, learning and self-evaluation abilities as well. Hear from one nonprofit leader who sees her responsibility for leadership and learning as two sides of the same coin, and engage in a conversation with your peers about how to bring your leadership and learning agendas closer together and help your grantees do the same.

Speakers:

Marilyn Darling, Fourth Quadrant Partners

Becky James-Hatter, Big Brothers Big Sisters Eastern Missouri

D4: Boundary Spanning Leadership

St. Helens (Mezzanine Level)

Session Designer: Lynn M. Fick-Cooper, Center for Creative Leadership

For philanthropic and nonprofit organizations to solve current problems, realize new opportunities and grow their impact, leaders must collaborate to think and act beyond current "group boundaries." Where disparate groups intersect, there is significant potential to create a nexus that unleashes possibilities and inspires results. But, it is not easy to lead outside our "box" on the organizational chart, across the lines of stakeholder interests or beyond the borders of the groups we represent. In this session, grantmakers will examine and apply a model of six boundary spanning practices used by emerging leaders in community health organizations across the country.

Speakers:

Lynn M. Fick-Cooper, Center for Creative Leadership

Sallie Petrucci George, Robert Wood Johnson Foundation

D5: Can't We All Play Nice? Reducing Government Barriers to Working with Nonprofits

Cascade II (Mezzanine Level)

Session Designer: Liz Darling, OneStar Foundation

Recently, there have been a variety of efforts to improve the collaboration between government and the nonprofit sector, often with the support of grantmakers. For example, a new law makes Texas' OneStar Foundation chair of an interagency coordinating group of 24 state agencies to reduce barriers to effective contracting with nonprofits, work across agencies to create more consistent funding applications, implement joint agency monitoring and shared reporting, partner with nonprofit networks to increase service delivery and to better understand the full cost of doing business in the nonprofit sector. Speakers include a perspective from state government, a successful state-wide public-private partnership, a thought leader on the role that overhead and capacity-building play in advancing outcomes and a social entrepreneur who brings nonprofits, philanthropy, government and business together to create social impact. Come learn more about the ways grantmakers can help bring government and nonprofits together around common goals.

Speakers:

Bryan Law, Texas House Committee on Public Health

Liz Darling, OneStar Foundation

Ann Goggins Gregory, The Bridgespan Group

Andrew Wolk, Root Cause

WEDNESDAY MARCH 14

D6: Applying Seven Proven Levers to Scale Impact

Fifth Avenue (Grand Level)

Session Designer: Jennifer Pawlowski, Taproot Foundation

With over 1.5 million nonprofits in the U.S., it's important to understand what makes some stand apart and what we can learn from them. Recent research by Taproot Foundation has identified that seven core practices are keys to scaling impact in high performing nonprofits, including effectively using volunteers, innovating, developing staff and board, advocating and evaluating. Participants will explore research findings, hear from a nonprofit executive about his experience in using these levers to transform his organization, and strategize how to adopt grantmaking practices that build the skills, shift the mindsets and develop the nonprofit leaders to manage the organizational transformation needed to successfully scale.

Speakers:

Aaron Hurst, Taproot Foundation

Matthew Klein, Blue Ridge Foundation New York

Mike O'Brien, iMentor

D7: Strategies to Engage Nonprofit Leaders in Design and Implementation

Cascade C (Mezzanine Level)

Session Designer: Lee Draper, Draper Consulting Group

Efforts to incorporate community stakeholders in a grantmakers' work are rare. However, nonprofit leaders and board chairs can be strong assets in the design and implementation of grantmaker programs and initiatives, making our work more effective and impactful. Their participation can provide valuable professional development for individuals and positively impact their organizations and communities. In this session, you will learn about a model that enables nonprofit directors and board chairs to play a meaningful role in program design, mentoring nonprofit leaders, advising grantmakers and facilitating training sessions. Participants will discuss engagement methods, online tools and how to trouble-shoot the common concerns around involving nonprofit leaders in the development of grantmaker programs.

Speakers:

Sylia Obagi, Annenberg Foundation

Thyonne Gordon, CoachArt

Diane Brigham, Ryman Arts

Michelle Torgerson, Draper Consulting Group

1:00 p.m. – 2:30 p.m.

Closing Plenary Luncheon — A Movement Builder's Perspective on How Grantmakers Can Grow Impact

Grand II and III (Grand Level)

Recently the spotlight has shone on a number of organizations who have effectively grown their impact through a variety of ways. Whether we are calling it scaling impact, networks, movement building or collaborative problem-solving, the big idea is essentially the same — we can achieve more working together than acting alone. And no matter what model of growing impact you subscribe to, there are some universal truths about what funders can do to best support nonprofits. This candid conversation with Darell Hammond, founder of KaBOOM!, will unpack some of the ways grantmakers both help and hinder efforts to grow impact. Grantmakers will share their commitments to changes in practice that will better support nonprofits' ability to grow impact.

*Featuring an introduction from Sidney Hargro,
Community Foundation of South Jersey*

Speakers:



Darell Hammond, KaBOOM!



Mae Hong, Rockefeller Philanthropy Advisors

 SUPPORTING EFFECTIVENESS

 EVALUATION AND LEARNING

 COLLABORATIVE PROBLEM-SOLVING

 SCALING IMPACT

 NETWORKING

PLAN YOUR CONFERENCE AGENDA

MONDAY, MARCH 12

Pre-Conference Workshops

9:00 a.m. – 12:00 p.m.

Session selected:

Location:

Opening Plenary Luncheon

1:00 p.m. – 3:00 p.m.

Location: Grand II and III (Grand Level)

Breakout Sessions Round A

3:30 p.m. – 5:00 p.m.

Session selected:

Location:

Welcome Reception

6:00 p.m. – 8:00 p.m.

Location: The Bill & Melinda

Gates Foundation

at 500 Fifth Avenue North, Seattle, Wash.

Transportation: GEO staff members will be leaving from the hotel lobby beginning at 5:30 p.m. and leading guests on the Seattle Monorail. Shuttle bus service will depart from the Westin beginning at 5:45 p.m.

TUESDAY, MARCH 13

Breakfast Plenary

8:30 a.m. – 10:00 a.m.

Location: Grand II and III (Grand Level)

Breakout Sessions Round B

10:15 a.m. – 11:45 a.m.

Session selected:

Location:

Networking Lunch

12:00 p.m. – 1:15 p.m.

Location: Grand II and III (Grand Level)

Short Talks

1:15 p.m. – 3:00 p.m.

Round 1: 1:20 - 1:45

Location:

Round 2: 2:00 - 2:25

Location:

Round 3: 2:40 - 3:00

Location:

TUESDAY, MARCH 13

Facilitated Conversations

3:30 p.m. – 5:00 p.m.

Location: Grand II and III (Grand Level)

Conversation selected:

Conversation selected:

Dine-Arounds

6:00 p.m. – 8:30 p.m.

Conversation selected:

Location:

WEDNESDAY, MARCH 14

Continental Breakfast

8:00 a.m. – 9:00 a.m.

Location: Grand II and III (Grand Level)

Breakout Sessions Round C

9:00 a.m. – 10:30 a.m.

Session selected:

Location:

Breakout Sessions Round D

11:00 a.m. – 12:30 p.m.

Session selected:

Location:

Closing Plenary Luncheon

1:00 p.m. – 2:30 p.m.

Location: Grand II and III (Grand Level)

NETWORKING

Have a smartphone or device? GEO is offering a new way to harness the power of mobile technology to make lasting connections. Each attendee name badge is imprinted with a unique QR code on the back. Using your smartphone and a QR code reader (download one for free using your device's app store or Web browser) you can scan another attendee's QR code and pull up their contact information. Save that information in your phone or share it along with your networking conversation notes using text or email so you can follow up with new and old connections after the conference.

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Better Results.

Grantmakers for Effective Organizations challenges the status quo in a field often resistant to change.



In a changing world where the old rules of philanthropy no longer apply, we help grantmakers keep pace by connecting them with innovative answers to field wide challenges. GEO is a community of more than 2,700 individuals representing more than 370 grantmaking organizations that are committed to supporting more efficient and effective nonprofit organizations.

Be a part of the GEO community to continue the conversations that you've started at the conference in the months ahead. Throughout the year, GEO's members ask tough questions, offer cutting-edge ideas and share examples of what works (and what doesn't) in philanthropy. Sustain the momentum and share the energy from this conference with your colleagues through access to cutting-edge resources and publications, peer-to-peer problem-solving through an email listserv and online resources, skill-building seminars, and so much more.

Not Yet a Member? Join the GEO Community Today!

Contact us at membership@geofunders.org or 202.898.1840.

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Nonmembers may purchase printed copies of publications for a fee.

Please indicate how many copies you would like to order:

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- ___ Catalyzing Networks for Social Change: A Funder's Guide
- ___ Widespread Empathy: 5 Steps to Achieving Greater Impact in Philanthropy
- ___ 2010 Annual Report
- ___ Do Nothing About Me Without Me, An Action Guide for Engaging Stakeholders
- ___ Coaching and Philanthropy, An Action Guide for Grantmakers
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- ___ Smarter Grantmaking in Challenging Economic Times
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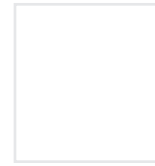
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Contact Evan Trowbridge, at 202.898.5728 or trowbridge@geofunders.org, with any questions.

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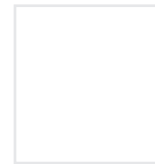
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NOTES

LIST YOUR TOP CONFERENCE INSIGHTS OR TAKEAWAYS:

1.

2.

3.

4.

5.

DRAWING ON YOUR OBSERVATIONS, INSIGHTS AND EXPERIENCES AT THE CONFERENCE:

What are you going to change in the next week?

What changes in practice do you want to experiment with in the coming three months?

What do you want to learn more about over the next six months?

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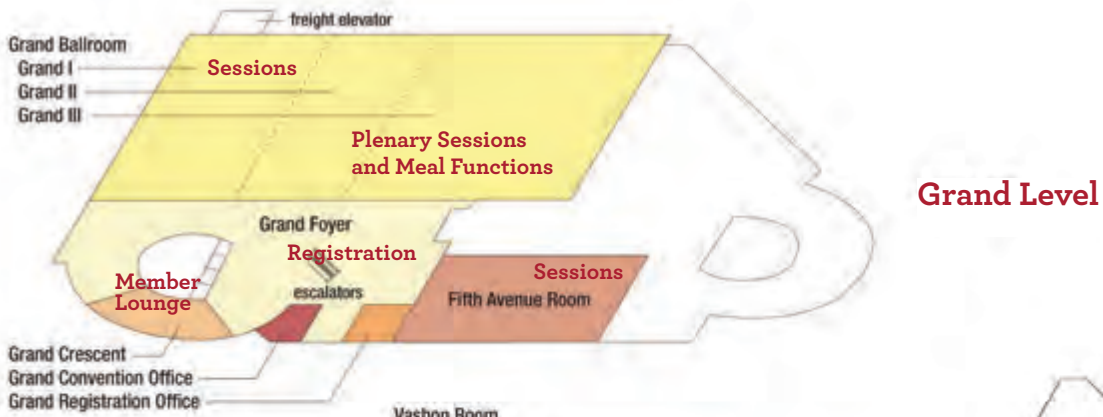
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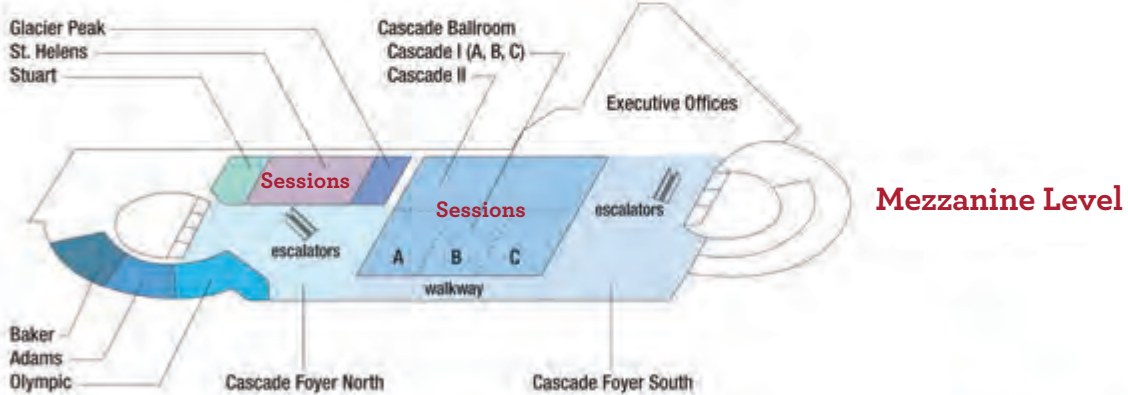
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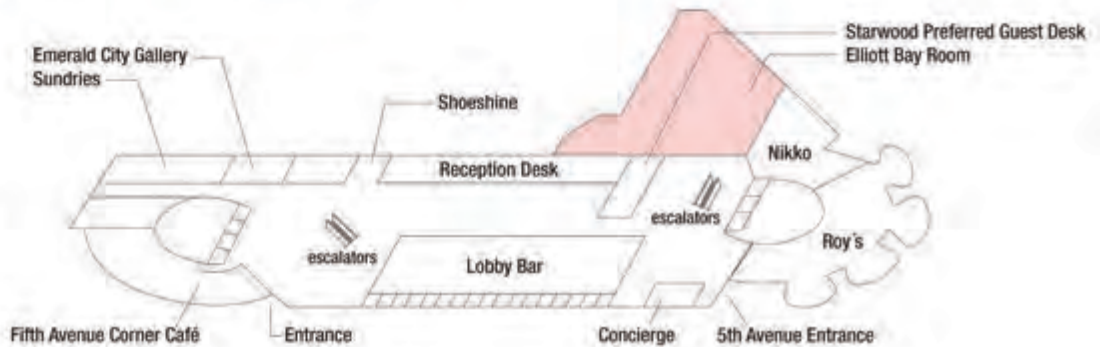
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