

Grantmakers for Effective Organizations
as part of the *Scaling What Works* initiative

presents



CONVENING PROGRAM

WASHINGTON, D.C. • FEBRUARY 21, 2013
WASHINGTON COURT HOTEL

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Scaling What Works
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Grantmakers for Effective Organizations is a community of more than 400 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, Funding Outcomes, 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.

About *Scaling What Works*

Launched in 2010, *Scaling What Works* is a multiyear learning initiative of Grantmakers for Effective Organizations to expand the number of grantmakers and public sector funders that are working together to broaden the impact of high-performing nonprofits. Through *Scaling What Works*, GEO offers trainings, networking opportunities and a host of tools and resources to better equip grantmakers to help the nonprofit organizations they support to plan, adapt and grow their impact in creating sustainable benefits for people, their communities and our planet. For more about *Scaling What Works*, visit www.scalingwhatworks.org.

Convening Planning Committee

Tonya Allen, The Skillman Foundation
Carol Thompson Cole, Venture Philanthropy Partners
Lynn Coriano, Social Venture Partners Seattle
Cynthia Gair, REDF
Charles T. Harris III, The Edna McConnell Clark Foundation
Mary Mountcastle, Z. Smith Reynolds Foundation
Bill Pitkin, Conrad N. Hilton Foundation

Scaling What Works Advisory Group

Charles T. Harris III, The Edna McConnell Clark Foundation (chair)
William F. Bacon, The Duke Endowment
Eugene W. Cochrane Jr., The Duke Endowment
Carol Thompson Cole, Venture Philanthropy Partners
Mimi Clarke Corcoran, Open Society Foundations
Anna Cowenhoven, The Bank of America Charitable Foundation, Inc.
Ed Foster-Simeon, U.S. Soccer Foundation
Margaret Hall, GreenLight Fund
Tom Kelly, Hawai'i Community Foundation
Mary Mountcastle, Z. Smith Reynolds Foundation
Shirley Sagawa, sagawa/jospin
Susan G. Zepeda, Foundation for a Healthy Kentucky Inc.



Today you join more than 150 grantmakers from the Grantmakers for Effective Organizations community to leverage our collective knowledge about strategic co-funding partnerships so that we are better equipped to help nonprofits have the broadest possible impact.

On behalf of my staff colleagues and the convening planning committee, I welcome you to Washington, D.C., and thank you for your patience and flexibility as we rescheduled this event due to the impact of Hurricane Sandy along the East Coast. We are thrilled to gather with you for a day packed with fresh ideas, practical examples and ample peer learning opportunities. Recognizing that there is no one-size-fits-all approach to co-funding in philanthropy, we are featuring a range of models from pooled funding (or capital aggregation) to targeted co-funding and strategic alignment. You'll also have the opportunity to participate in several practical conversations based on your interests and experiences.

For this convening, we have moved away from standard breakout sessions to bring you more opportunities to engage in meaningful dialogue with your peers. Sessions will require your active participation throughout the day. Most are structured as facilitated conversations to provide a platform for high-quality engagement and peer learning.

This convening was made possible by the ideas and contributions of our planning committee and the generosity of the 22 grantmakers that have supported GEO's *Scaling What Works* initiative. Through this initiative, we are providing a platform for collaborative learning and action so that lessons learned about growing impact are available for the field of philanthropy.

We hope you'll leave this event with some new ideas and relationships that will help you make the most of your investments by collaborating and co-investing with like-minded peers.



Kathleen P. Enright

**President and CEO
Grantmakers for
Effective Organizations**

RESOURCES ON THE WEB

Participant Roster. Facilitator Bios. Session Resources.

It's all online. Just use a Quick Response code reader on your smartphone to scan the QR code at right, or visit www.scalingwhatworks.org/events/strategic-co-funding.



Twitter:



#GEOCofund

Use this hashtag to share your insights from the convening and to see what others are saying as well.

@geofunders

GEO's Twitter handle; follow it for updates during the convening and for news, resources and opportunities throughout the year.

Facebook:



[Facebook.com/grantmakers.for.effective.organizations](https://www.facebook.com/grantmakers.for.effective.organizations)

Visit our Facebook page, where GEO shares its latest work as well as interesting information on grantmaking from all across the Web. You can also read the latest GEONews, view upcoming events and share your own comments.

Network with Members:

A great resource for grantmaker collaboration, our **Network with Members** feature allows GEO members to connect with each other by searching a database of grantmakers based on geographic location, title, grantmaking interests, organization and last name. Visit geofunders.org/network-with-members to use this feature and to join the ranks of those leading the charge for more effective grantmaking.

Additional Resources for Grantmakers:

www.geofunders.org

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

www.scalingwhatworks.org

Find additional resources related to practices that grow impact and build stronger and more effective nonprofit organizations.



The Huffington Post:

GEO President and CEO Kathleen Enright shares her own insights on grantmaking as a contributor to *The Huffington Post*. You can view her posts to the site at www.huffingtonpost.com/kathleen-p-enright.

SCHEDULE AT A GLANCE

Use this page to plan out your convening agenda by selecting and filling in conversation topics. You'll find detailed session descriptions in the following pages and also online.

Thursday, Feb. 21, 2013

8:00 a.m. – 4:00 p.m.	Convening Registration Desk Open	Atrium Foyer
8:00 a.m. – 8:45 a.m.	Networking Breakfast	Atrium Ballroom
9:00 a.m. – 10:15 a.m.	Welcome and Opening Session: Collective Action, Broader Impact	Atrium Ballroom
10:15 a.m. – 10:30 a.m.	Break	
10:30 a.m. – 12:30 p.m.	Session A: Co-Funding Models and Perspectives	Atrium Ballroom, Hermitage and Madison Rooms
<ul style="list-style-type: none"> Round 1: 10:35 a.m. – 11:05 a.m. Topic: _____ Room: _____ Round 2: 11:15 a.m. – 11:45 a.m. Topic: _____ Room: _____ Round 3: 11:55 a.m. – 12:25 p.m. Topic: _____ Room: _____ 		
12:30 p.m. – 1:30 p.m.	Networking Lunch	Atrium Ballroom
1:30 p.m. – 3:30 p.m.	Session B: Strategies and Tactics for Co-Funding That Yields Better and More Results	Atrium Ballroom, Hermitage and Madison Rooms
<ul style="list-style-type: none"> Round 1: 1:35 p.m. – 2:05 p.m. Topic: _____ Room: _____ Round 2: 2:15 p.m. – 2:45 p.m. Topic: _____ Room: _____ Round 3: 2:55 p.m. – 3:25 p.m. Topic: _____ Room: _____ 		
3:30 p.m. – 3:45 p.m.	Break	
3:45 p.m. – 5:00 p.m.	Closing Session: Fearless Philanthropy — Reaching Out, Taking Risks and Achieving More	Atrium Ballroom
5:00 p.m. – 7:00 p.m.	Informal Networking	Washington Court Hotel lobby lounge

THURSDAY, FEB. 21, 2013

8:00 a.m. – 8:45 a.m.

Networking Breakfast

Start your day by establishing new connections that can help you advance your work. Join a table of peers working on the same issues as you; each table has been assigned a funding focus area, based on the information that participants provided during registration. Use this opportunity to learn from the experience of peers or share some of your own insights to contribute to collective knowledge that can help advance the field.

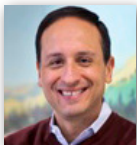
9:00 a.m. – 10:15 a.m.

Welcome and Opening Session: Collective Action, Broader Impact

Why and how do grantmakers work together to address issues of shared concern? This multi-speaker session explores the idea that grantmakers can increase their impact by working beyond the traditional constraints of individual grants, initiatives or organizations, and more intentionally joining together to provide funding and other support. The James Irvine Foundation President and CEO, and GEO co-founder, Jim E. Canales will frame the conversation drawing on his own experience. Then, in a rapid-fire format, five co-funding practitioners working on a range of issues, such as advancing opportunities for vulnerable youth, promoting marriage equality and increasing civic participation among communities of color, will share their co-funding stories, challenge us to think in new ways, and perhaps even inspire us to act. We'll see that no single grantmaker had the resources, expertise or reach to tackle any of these issues, and that each chose a different approach to co-funding. Although their practices differ, what lies beneath each story is an unwavering belief that we can achieve better results through a collective approach than we can by working alone.

Featuring:

- Opening remarks from Kathleen Enright, Grantmakers for Effective Organizations
- A talk to frame the conversation by Jim E. Canales, The James Irvine Foundation
- Five rapid-fire presentations from:
 - Carol Goss, The Skillman Foundation, representing the **Good Neighborhoods** program
 - Charles T. Harris III, The Edna McConnell Clark Foundation, representing the **True North Fund**
 - Caroline Hotaling, Ms. Foundation for Women, representing the **Collaborative Fund for Healthy Girls/Healthy Women**
 - Judy Patrick, The Women's Foundation of California, representing **California Civic Participation Funders**
 - Tim Sweeney, The Gill Foundation, representing the **Civil Marriage Collaborative**



Jim E. Canales



Carol Goss



Charles T. Harris III



Caroline Hotaling



Judy Patrick



Tim Sweeney

These rapid-fire presenters also will facilitate deeper-dive case study conversations on their co-funding example during Session A: Co-Funding Models and Perspectives.

10:15 a.m. – 10:30 a.m.

Break

10:30 a.m. – 12:30 p.m.

Session A: Co-Funding Models and Perspectives

Round 1: 10:35 a.m. – 11:05 a.m. | Round 2: 11:15 a.m. – 11:45 a.m. | Round 3: 11:55 a.m. – 12:25 p.m.

Learn from the experiences of co-funding practitioners about a wide range of co-funding structures and perspectives, and then dig deeper into the benefits that participating grantmakers and grantees realized, along with lessons learned, challenges and questions.

In this session, **select three different 30-minute conversations** that start with a seven-minute case study introduction from the facilitator. Case studies cover a range of co-funding approaches and structures, including:

- **Pooled funding** (or capital aggregation): Funders contribute to a collective fund, which may be jointly administered by the group or by a lead donor or a third party.
- **Targeted co-funding**: Funders deliberately but independently make grants to the same program, organization or issue.
- **Strategic alignment**: Funders agree to adopt joint or complementary strategies, in pursuit of a common goal, and put their resources toward aspects of that strategy.

Selected cases also span a variety of grantmaking fields of interest, including:



Community and economic development



Human services



Education



Public affairs, civic participation and civil rights



Environmental conservation



Religion



Health and sciences

Case study examples and facilitators include:

POOLED FUNDING



California Catalyst Fund (Atrium Ballroom)

Jessica LaBarbera, Nonprofit Finance Fund

Amid the slow economic recovery and developments in healthcare reform, community health clinics face unprecedented challenges. To help California community clinics adapt and thrive, California HealthCare Foundation and Nonprofit Finance Fund created the California Catalyst Fund. Building on the success of a similar fund in Boston, the CCF underwrites the cost of technical assistance so that nonprofit clinics and consortia can explore voluntary strategic collaboration and restructuring projects with expert guidance from experienced technical assistance providers. NFF administers the fund and a funder advisory board approves all grants. Since the launch of CCF in March 2012, Blue Shield of California Foundation has joined as a co-investor, and the fund has made awards to 14 projects at different stages of development, from pre-planning feasibility studies to implementation of a detailed restructuring plans. NFF also counsels projects that are not selected with an eye toward preparing them for reapplication.



California Water Foundation (Atrium Ballroom)

Joya Banerjee, S.D. Bechtel, Jr. Foundation, and David Beckman, Pisces Foundation

Over the past 100 years, California developed a vast water management system that contributes to the state's \$2 trillion economy. However, due to environmental degradation, population growth and other drivers of change, this system is not sustainable. If current trends continue, by 2050 the gap between California's water supply and demand will equal the water use of eight cities the size of Los Angeles. As a consequence, agricultural production will suffer, key industries will face increased costs of doing business and the environment will continue to decline. Recognizing that improving any complex system requires coordination among important stakeholders, a group of grantmakers pooled funds to launch the California Water Foundation, a 10-year, \$100 million effort designed to create a comprehensive approach to water management. CWF develops, guides and implements projects, re-grants funds and oversees day-to-day activities to ensure a sustainable and resilient water supply for the economy and environment. Funders that contribute at least \$1 million per year meet regularly to determine the CWF's overall strategic direction and evaluate progress to date.



The Challenge Fund for Journalism (Atrium Ballroom)

Paul Connolly, TCC Group

The Challenge Fund for Journalism initiative was born of a group of funders who shared an interest in supporting high-quality reporting from nonprofit media organizations and helping these groups strengthen their fund-development capacity and achieve long-term sustainability. The initiative, managed by TCC Group, provided matching grants and capacity-building support to 53 nonprofits across the U.S., in particular organizations that promoted diverse voices in the media. Grantees of the fund were required to raise a matching amount and participate in other learning activities, such as one-on-one coaching, convenings and virtual networking. As a result, the fund helped the nonprofit media organizations to leverage \$3.6 million in grant money into more than \$9 million, thus allowing them to diversify their funding sources and experiment with sustainability and growth plans. An overwhelming number of grantees reported positive changes to their organization as a result of the support provided by the fund.



Cincinnati/Northern Kentucky Social Innovation Fund (Atrium Ballroom)

Mike Baker, Cincinnati/Northern Kentucky Social Innovation Fund

The Cincinnati/Northern Kentucky Social Innovation Fund is a partnership of more than a dozen local grantmakers committed to supporting effective community solutions for low-income families and children from "cradle to career." The project is led by two primary partners — United Way of Greater Cincinnati and the Strive Partnership, a coalition of education, business, philanthropic, nonprofit and parent leaders committed to improving student achievement in the region. With the support of a federal Social Innovation Fund award, this group of funders is providing both grant funding and capacity-building services to nine community organizations, helping them improve management efficiency as well as replication of tested programs.



Community and economic development



Education



Environmental conservation



Health and sciences



Human services



Public affairs, civic participation and civil rights



Religion



The Collaborative Fund for Healthy Girls/Healthy Women (Atrium Ballroom)
Caroline Hotaling, Ms. Foundation for Women

Ms. Foundation's Collaborative Fund for Healthy Girls/Healthy Women, which originated in 1994 and later evolved into the Collaborative Fund for Youth-Led Social Change in 2000, was a national partnership among more than 30 funders, beneficiaries, program staff of grantee organizations and other experts. The fund leveraged more than \$4 million to identify and support effective programs that fostered the inherent strengths, leadership abilities and health of girls. Grantees received \$35,000 annually for up to three years, as well as technical assistance and learning opportunities, alongside their peer and co-investment partners. Participating foundations were required to contribute a minimum of \$150,000 to the fund over three years, while individual donors contributed \$75,000. Funding partners agreed to pool their resources and use a consensus decision-making process. Partners also engaged in all phases of the grantmaking process, designing the requests for proposals, reviewing proposals, conducting site visits and engaging in capacity-building and learning activities.



D.C. Public Education Fund (Atrium Ballroom)
Mieka Wick, CityBridge Foundation

The D.C. Public Education Fund is an independent nonprofit that supports reform efforts in District of Columbia Public Schools. Working alongside DCPS leadership, the Education Fund partners with the philanthropic community to strategically invest in the system's most critical priorities, including teacher and principal effectiveness, literacy initiatives, blended learning models, secondary schools transformation and systems reform. The Education Fund also provides due diligence and strategic guidance, and evaluates effectiveness to improve performance and ensure that DCPS achieve established benchmarks. Since its founding, the Education Fund has secured commitments of nearly \$75 million.



Forever Costa Rica (Atrium Ballroom)
Ivan Barkhorn, Redstone Strategy Group, LLC

A group of conservationists, former bankers and management consultants have created a new way to protect large ecosystems that may work for other large-scale social projects as well. The "Project Finance for Permanence" approach — which has been applied over the past decade in the Amazon Region Protected Areas program, in the Great Bear Rainforest of British Columbia and with Forever Costa Rica — pools funds from philanthropists, governments and multilateral institutions. Each participant promises to help fund a shared, strategic and large-scale goal, and only once all the necessary support is raised, and other mutually agreed to conditions are met, is the funding disbursed. The resulting group funding model ensures that when participants pledge support it stimulates support from co-funders, and thus yields a combined investment that helps achieves greater social outcomes.



Partners Investing in Nursing's Future (Atrium Ballroom)

Judith Woodruff, Northwest Health Foundation

Partners Investing in Nursing's Future is a collaborative partnership between the Northwest Health Foundation, the Robert Wood Johnson Foundation and almost 300 state, regional and local foundations to advance the profession of nursing. The program encourages local funders to catalyze partnerships with nursing leaders and other community partners to foster grassroots solutions to the challenge of ensuring a competent and experienced nursing workforce. At the end of 2011 PIN had awarded \$14 million to 61 PIN partnerships across the country. Each PIN partner received up to \$250,000 for projects lasting up to 36 months. The local funders contribute matching funds and participate in knowledge-sharing opportunities across the entire PIN network.



Silicon Valley Out-of-School-Time Collaborative (Atrium Ballroom)

Ash McNeely, Sand Hill Foundation

The Silicon Valley Out-of-School-Time Collaborative aims to amplify the impact of a cohort of organizations that focus on academic achievement and college readiness beyond school hours for students from low-income families in Silicon Valley. The collaborative, consisting of four partners — two local family foundations, a national family foundation and a venture philanthropy fund — selected nine organizations to receive annual grants of \$45,000 for three years. Grantees participate in a learning community, designed to nurture partnerships and facilitate sharing of best practices and effective models for after-school and summer programming that can later be spread to other communities.



True North Fund (Atrium Ballroom)

Charles T. Harris III, The Edna McConnell Clark Foundation

The True North Fund, created by the Edna McConnell Clark Foundation in part with a \$10 million-per-year federal Social Innovation Fund grant matched 3:1 with private funding, aims to provide low-income nine-to-24-year-olds the opportunity to become productive, self-sufficient members of society. The True North Fund supports nine nonprofits that help highly vulnerable young people get an education, prepare for the world of work and avoid risky behaviors. Building on the success of its Growth Capital Aggregation Pilot, EMCF acts as the lead investor in the True North Fund, collaborating with the Bridgespan Group, MDRC and 12 co-investors to provide grantees with financial, strategic planning and evaluation support. This investment helps each nonprofit create a multiyear growth plan to guide its development, become financially sustainable and better serve greater numbers of youth, while advancing its evidence base via rigorous third-party evaluation.



Community and economic development



Education



Environmental conservation



Health and sciences



Human services



Public affairs, civic participation and civil rights



Religion



Washington Families Fund (Atrium Ballroom)

Kelly Zelenka, Building Changes

Created in 2004 by a group of private funders; government officials, including the Washington State Legislature; and nonprofit advocates, the Washington Families Fund is the first public-private pooled fund to support providers serving homeless families. Since its inception, WFF, which is led by Building Changes, has secured more than \$30 million from 25 cross-sector funding partners and re-granted these funds to 51 providers throughout the state. WFF makes grants in three areas of work: support services, employment services and access to services through systems innovations. Its grantees have served 1,750 families, including more than 3,000 children. WFF is undergoing an extensive evaluation process. Findings show that more than 70 percent of children served stayed stable in their schools rather than transfer as a result of homelessness, and approximately 60 percent of families have exited into stable housing.

TARGETED CO-FUNDING



100Kin10 STEM Teacher Initiative (Hermitage)

Talia Milgrom-Elcott, Carnegie Corporation of New York

100Kin10 is a multi-sector network that responds to the national imperative to train 100,000 science, technology, engineering, and math (STEM) teachers by 2021. Participating funders commit a minimum of \$500,000 over three years to support any of the network's more than 100 partner organizations. The initiative surpassed its first fund goal of \$20 million and will begin recruiting for a second fund in the fall of 2012. The University of Chicago Urban Education Institute oversees the 100Kin10 vetting process. Additionally, University of Chicago is developing a learning and R&D infrastructure and tools for 100Kin10 partners to measure the quality and impact of their commitments.



Home For Good Funders Collaborative (Hermitage)

Bill Pitkin, Conrad N. Hilton Foundation

The Home For Good Funders Collaborative formed in 2011 and in its first funding round awarded more than \$100 million in resources to support housing and services for chronically homeless persons in Los Angeles County. Seeded by a \$1 million challenge grant from the Conrad N. Hilton Foundation, the collaborative includes 24 private and public sector funders. Created as part of the Home For Good plan to end chronic and veteran homelessness, the collaborative is managed by United Way of Greater L.A. and seeks to align and capitalize on housing and service funding streams across sectors and maximize the impact of participating funders' dollars. In the first year, philanthropic investment totaled \$5 million, which was combined with \$56 million in public sector resources, such as housing vouchers and supportive services. In addition, public funders awarded \$44 million in supportive housing development and operating funding as part of the Home For Good request for proposals.

Note: Structure is a combination of targeted co-funding and pooled funding.



Moishe House (Hermitage)

Josh Miller, Jim Joseph Foundation

Moishe House is a nonprofit network of more than 40 houses in 14 countries that serve as grassroots community spaces for Jewish young adults ages 21 – 30. In 2009, collaboration began between two national foundations that wanted to invest in the growth and sustainability of Moishe House's low-barrier, cost-effective and scalable model for building peer-based Jewish communities and meaningful learning opportunities. The Jim Joseph Foundation and the Charles and Lynn Schusterman Family Foundation independently contributed multiyear grants of \$1.25 million and \$1.5 million, respectively, toward capacity building and scaling. They recently collaborated on the formation of a larger collaborative investment that includes \$6 million in growth capital from local and national funders to kick off a larger campaign to enable Moishe House to double its reach by 2016.

Note: Structure is a combination of targeted co-funding and pooled funding.



youthCONNECT (Hermitage)

Marc Schindler, Venture Philanthropy Partners

Venture Philanthropy Partners' youthCONNECT initiative aims to increase the education, employment and healthy behavior outcomes of low-income and at-risk youth, ages 14 - 24, in the Washington, D.C. metro area. With support from the federal Social Innovation Fund and match funders, VPP is supporting a network of nonprofits that will coordinate to help disadvantaged youth transition to productive, self-sufficient adulthood. VPP received a Social Innovation Fund award in 2010, which it matched dollar for dollar and which has been leveraged by targeted support directly to the participating nonprofits from 19 match funders, including private and corporate funders, resulting in an almost \$22 million investment in the region over three years, and \$36 million over five years.

STRATEGIC ALIGNMENT



California Civic Participation Funders (Madison)

Judy Patrick, The Women's Foundation of California

A diverse group of 10 foundations in California came together in early 2012 to try and answer the question: How can foundations help build movements for social change and win? They formed a funder collaborative whose goal is to strengthen civic participation in communities of color and among other underrepresented populations. The funders identified a set of critical capacities that would be needed, including community organizing, leadership development, policy research and voter mobilization. The group identified four counties in targeted regions of the state, and by spring 2012 had invested over \$4 million toward strengthening local organizations and networks to mobilize and engage underrepresented voters more effectively. Though they are working toward a shared goal, each foundation still makes its own independent decisions about which parts of the larger group's goals and strategy to support. The collaborative also meets quarterly to learn together about critical civic engagement topics in the state and to further align their grantmaking in the four counties.



Civil Marriage Collaborative (Madison)

Tim Sweeney, The Gill Foundation

The Civil Marriage Collaborative, a grantmaking initiative of the Proteus Fund, is designed to strengthen and build a state-by-state movement for same-gender couples' freedom to marry in the U.S. The collaborative provides expertise, support and coordination to foundations, individual donors and philanthropic advisors, helping to leverage their resources. CMC awards approximately \$2 million annually to support public education, research and organizing efforts of organizations working in states where marriage equality is a near-term possibility or to defend existing marriage rights. The collaborative also makes rapid-response, capacity-building grants in states where opportunities to advance the marriage debate or challenges to marriage progress arise quickly, outside of regular funding cycles. Due to the evolving nature of the marriage landscape, CMC reviews its priorities, goals and processes annually, ensuring maximum impact and responsiveness to local needs.

Note: Structure is a combination of strategic alignment and pooled funding.



Funders for Alternatives to the Death Penalty (Madison)

Martha Toll, Butler Family Fund

Funders for Alternatives to the Death Penalty is an affinity group of foundations working to abolish the death penalty across the U.S. The group has a two-pronged approach. Members pool and collectively distribute funds to state-level campaigns and in rapid response to unfolding current events. Foundations and grassroots advocates advise on this grantmaking. Participating funders also can align their own independent grantmaking against a common strategic plan. Members of the group choose to take part in one or both approaches, which invites participation from a more diverse set of grantmakers.

Note: Structure is a combination of strategic alignment and pooled funding.



Good Neighborhoods (Madison)

Carol Goss, The Skillman Foundation

The Skillman Foundation began a comprehensive place-based neighborhood initiative, Good Neighborhoods, in 2006 with the primary goal of transforming communities into healthy environments for children. The commitment is 10 years with an investment of \$100 million. In addition, Living Cities designated Detroit as one of the sites for its Integration Initiative and linked the initiative with one Good Neighborhoods' location, providing up to \$20 million of loans, grants and program-related investments. Good Neighborhoods' robust set of Centers for Working Families, centers that provide workforce and asset-building services for low-income families across the six neighborhoods, was a result of Skillman's efforts aligning local funders, LISC and United Way to locally implement centers similar to those funded by the Annie E. Casey Foundation.

Note: Structure is a combination of strategic alignment and pooled funding.



Community and economic development



Education



Environmental conservation



Health and sciences



Human services



Public affairs, civic participation and civil rights



Religion

12:30 – 1:30 p.m.

Networking Lunch

Grab lunch with your fellow participants to continue conversations from the morning sessions. GEO will provide some discussion questions to help you delve deeper into conversations and peer learning.

1:30 p.m. – 3:30 p.m.

Session B: Strategies and Tactics for Co-Funding That Yields Better and More Results

Round 1: 1:35 p.m. – 2:05 p.m. | Round 2: 2:15 p.m. – 2:45 p.m. | Round 3: 2:55 p.m. – 3:25 p.m.

Learn alongside and coach your peers on the mechanics of co-funding effectively, as well as overcoming obstacles. In this session, select **three different tactical conversations from the list of 10 topics**. Each topic will be led by two different facilitators at separate tables during each round. Each 30-minute, World Café-style conversation is designed to focus on the practicalities of:

- **Getting ready to participate in co-funding,**
- **Picking the right partners,**
- **Selecting the right strategies and tactics for success** or
- **Learning for improvement.**

Conversation topics and facilitators include:

GETTING READY TO PARTICIPATE IN CO-FUNDING

1. **Testing Readiness:** How do I know if my organization is ready for co-funding? Is co-funding the right vehicle for what my organization is trying to accomplish?
 - a. **Cynthia Gair, REDF** (Atrium Ballroom)
 - b. **John Kania, FSG** (Atrium Ballroom)
2. **Embracing the Role of “Minority Investor” Rather Than Lead Funder:** How does my organization get comfortable following (i.e., contributing resources, expertise and advice) when we are accustomed to leading (i.e., assuming primary responsibility for implementation and fund allocation)?
 - a. **Sheldon Caplis, Citi Community Development** (Atrium Ballroom)
 - b. **Charles Rutheiser, The Annie E. Casey Foundation** (Atrium Ballroom)

PICKING THE RIGHT PARTNERS

3. **Partnership Vetting and Persuading:** How do I identify, select and convince the right co-funding partners? What tools and resources exist to help with this?
 - a. **Tonya Allen, The Skillman Foundation** (Atrium Ballroom)
 - b. **Tracy Mack Parker, Institute for Philanthropy U.S.** (Atrium Ballroom)
4. **Working with Government:** How do we work effectively with public funders? Are there pitfalls we can avoid? What role can foundations play to align and leverage public and private funding?
 - a. **Emily Tow Jackson, The Tow Foundation** (Atrium Ballroom)
 - b. **Sinead Keegan, Mayor’s Fund to Advance New York City / NYC Center for Economic Opportunity** (Atrium Ballroom)

SELECTING THE RIGHT STRATEGIES AND TACTICS FOR SUCCESS

5. **Setting Up the Arrangement:** At what point do we need to formalize the collaboration? What is the right process for agreeing on a common strategy and goals? How do we form processes and agreements to guide our work together? What is the right infrastructure for our co-funding arrangement (i.e., do I drive or do I co-create something with my peers)?
 - a. **Courtney Bourns, Henry P. Kendall Foundation** (Atrium Ballroom)
 - b. **Mary Manuel, The McKay Foundation** (Atrium Ballroom)

6. **Supporting Sustainability, Expansion or Scaling:** How do we structure our co-investment to help grantees achieve long-range sustainability and growth plans, as well as position partners to exit responsibly? Does co-funding look different when you support earlier-stage organizations or emergent fields rather than high-performing, more established groups?
 - a. **Susan Wolf Ditkoff, The Bridgespan Group** (Atrium Ballroom)
 - b. **Aaron Jacobs, The Edna McConnell Clark Foundation** (Atrium Ballroom)

7. **Supporting a Networked Approach to Fund Allocations:** Do we make grants to single organizations vs. collaboratives or a cohort of organizations? What are unique considerations to funding collaboratives or cohorts of organizations? How do we coordinate due diligence?
 - a. **Carol Thompson Cole, Venture Philanthropy Partners** (Hermitage)
 - b. **Sara Rose Gorfinkel, Tikkun Olam Women's Foundation of Greater Washington** (Hermitage)

LEARNING FOR IMPROVEMENT

8. **Collective Learning and Evaluation:** How do I assess the impact of my co-funding work and the outcomes of the funded projects? When should we start assessing the results of our work? How do we set up a process for shared measurement, outcomes and reporting?
 - a. **Lynn Coriano, Social Venture Partners Seattle** (Hermitage)
 - b. **Lance Potter, New Profit Inc.** (Hermitage)

9. **Troubleshooting Co-Funding Challenges:** How do we know it's time to make a change? How do we best make mid-course corrections in a co-funding arrangement that isn't going well? How do we pay attention to the process and relationships as well as funding results?
 - a. **Susan Gewirtz, The Annie E. Casey Foundation** (Madison)
 - b. **Laila Mehta, Asian Americans/Pacific Islanders in Philanthropy** (Madison)

10. **Words of Wisdom from Nonprofit Leaders:** What do our grantees wish we knew about improving the impact of our funding? What have been their experiences being supported by a funders' collaborative? How has co-funding generated more money, more efficient money and more stable money for nonprofits?
 - a. **Maria Gomez, Mary's Center for Maternal and Child Care, and Lori Kaplan, Latin American Youth Center** (Madison)
 - b. **Debra Montanino, Communities In Schools, and Michelle Tafel, College Summit** (Madison)

3:30 p.m. – 3:45 p.m.

Break

3:45 p.m. – 5:00 p.m.

Closing Session: Fearless Philanthropy — Reaching Out, Taking Risks and Achieving More

It is well known that philanthropy cannot keep pace with social challenges. And, there is an increasing recognition among funders, nonprofits, government agencies and corporations alike that we must experiment with ways to more effectively work together to grow social impact, even at the risk of failure. In celebrating its 15th anniversary last year, the Case Foundation launched its Be Fearless campaign, a rallying cry for more effective philanthropy and change making. In this candid conversation with Jean Case, CEO and co-founder of the Case Foundation, hear first-hand what it truly takes, on a practical level, for a grantmaker to be fearless. She will share the real story on how the Case Foundation has gone beyond its comfort zone, made big bets, relinquished control and learned from failure. Jean also will share honest insights about embracing collaboration as a strategic advantage, both in her past business experiences and in her family's personal philanthropy.

Featuring an introduction from Carol Thompson Cole, Venture Philanthropy Partners.

Speakers:

- Jean Case, The Case Foundation
- Kathleen Enright, Grantmakers for Effective Organizations



Jean Case

5:00 p.m. – 7:00 p.m.

Informal Networking

Washington Court Hotel lobby lounge

Before your trip home, continue your conversations over happy hour in the hotel lounge or dinner at a local restaurant in D.C.'s Capitol Hill neighborhood. Visit the registration desk to get a list of restaurant recommendations compiled by GEO staff.

Funding in Collaboration with Other Grantmakers

If you are a GEO member with co-funding experience, are you interested in being part of a virtual, peer learning conversation series after the convening? We would love to hear from you! What burning question or challenge do you have related to funding in collaboration with other grantmakers that you might want to explore with your peers in this program? Please contact Jessica Wechter at wechter@geofunders.org or 202.898.1843.

Scaling What Works

A LEARNING INITIATIVE OF



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

REGISTRATION NOW OPEN TO GEO MEMBERS.

The Learning Conference 2013

June 3 – 4, 2013

Miami, Florida

Registration now open to GEO members.

[www.geofunders.org/conferences/
learning-conference-2013](http://www.geofunders.org/conferences/learning-conference-2013)

2014 National Conference

March 10 – 12, 2014

Los Angeles, California

Registration opens in late fall 2013.

[www.geofunders.org/conferences/
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1725 DeSales Street, NW, Suite 404
Washington, DC 20036
Tel: 202.898.1840 • Fax: 202.898.0318
Web: www.geofunders.org