

Nov. 18–19, 2013

Washington, D.C.  
Capital Hilton



Grantmakers for Effective Organizations presents

# SUPPORTING MOVEMENTS

A grantmaker gathering on collaborative  
approaches for social change

Hosted by the *Scaling What Works* initiative

#GEOmvt

[www.scalingwhatworks.org](http://www.scalingwhatworks.org)



Scaling What Works

A LEARNING INITIATIVE OF



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## **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 training, 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](http://www.scalingwhatworks.org).

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## **Conference Planning Committee**

David Beckman, Pisces Foundation

David C. Colby, Robert Wood Johnson Foundation

Laura L. Efurd, ZeroDivide

Margaret Hall, GreenLight Fund

Annie Hernandez, Youth Philanthropy Connect and Frieda C. Fox Family Foundation

Robin Katcher, Management Assistance Group

Elissa Perry, Management Assistance Group

Michael Renner, Missouri Foundation for Health

Wendy Todd, Marin Community Foundation

Kristy Trautmann, FISA Foundation

## ***Scaling What Works* Advisory Group**

Charles T. Harris III, The Edna McConnell Clark Foundation (chair)

William F. Bacon, The Duke Endowment

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Carol Thompson Cole, Venture Philanthropy Partners

Mimi Clarke Corcoran, formerly with Open Society Foundations

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.



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## Capital Hilton Floor Plan



16TH STREET



**I am thrilled to welcome you to Washington, D.C., and to GEO's Supporting Movements conference. This conference draws from the work of the many GEO members who have long invested in people and institutions willing to challenge the status quo and lead change.**

This conference is 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. The initiative has highlighted a variety of approaches for grantmakers interested in creating more value for communities and making more progress on social challenges. Supporting movements is clearly one such powerful approach to creating more widespread and lasting change.

Yet to be an effective supporter of a movement requires some shifts away from traditional approaches to grantmaking. It requires that we work across silos, put a shared vision ahead of our individual agendas and make the necessary investments in infrastructure and skill building so that collaborations can thrive.

Over the next two days you will have the opportunity to connect with like-minded peers to discuss the opportunities and challenges inherent to building strong organizations, networks and movements, including the changes that we all might need to make to collaborate more effectively.

The program features a variety of groups that are achieving real results by experimenting with networked and movement-oriented approaches. You'll have time to dig deeper into the secrets of their successes and the stumbles they faced along the way and draw connections between their experiences and your own work.

For this conference, we are combining standard breakouts with other session formats to bring you more opportunities to engage in meaningful dialogue with grantmaker and nonprofit peers. Be prepared to actively participate throughout the event.

We hope you'll leave the conference energized and equipped with some new ideas and relationships to make the most of your investments in movements and other collaborative efforts for social change, whatever form they take.



**Kathleen P. Enright**

A handwritten signature in black ink that reads "Kathleen P. Enright". The signature is fluid and cursive, matching the printed name above it.

**President and CEO  
Grantmakers for Effective Organizations**

# RESOURCES ON THE WEB

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## Participant Roster. Speaker Bios. Session Resources.

It's all online. Just visit [www.scalingwhatworks.org/events/supporting-movements](http://www.scalingwhatworks.org/events/supporting-movements).

## Recommended Reading:

### ***Many Hands, More Impact: Philanthropy's Role in Supporting Movements***

This publication explores the role of philanthropy in supporting movements and shares the stories of GEO members who are engaged in movement building as a strategy to grow impact. Use its framework and related resources list to explore the many potential roles for grantmakers in movement building. Download a copy at [bit.ly/GEOmvt](http://bit.ly/GEOmvt).

## Twitter:



#GEOmvt

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

## @geofunders

GEO's Twitter handle; follow it for updates during the conference and for news, resources and opportunities throughout the year. Also, find other conference participants on Twitter using our Twitter list "GEOmvt."

## LinkedIn:



[bit.ly/LinkedInGEO](http://bit.ly/LinkedInGEO)

GEO members are invited to join our LinkedIn group, to dialogue and exchange ideas that don't quite fit into 140 characters. Since the group is only open to GEO members, it's also a less public environment for giving input and seeking advice, and GEO staff regularly post resources, learning opportunities, job openings and more.

## Network with Members:

A great resource for grantmaker collaboration, our Network with Members tool 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 [www.geofunders.org/network-with-members](http://www.geofunders.org/network-with-members) to use this tool and to connect with peers leading the charge for more effective grantmaking.

## Additional Resources for Grantmakers:

[www.geofunders.org](http://www.geofunders.org)

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

[www.scalingwhatworks.org](http://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](http://www.huffingtonpost.com/kathleen-p-enright).

# SCHEDULE AT A GLANCE

Use these pages to plan your conference agenda by selecting and filling in your session preferences. You'll find detailed descriptions in the following pages and online.

**Monday, Nov. 18, 2013**

8:00 a.m. – 5:00 p.m.	<b>Registration Desk Open</b>	<i>Upper Lobby North</i>
8:30 – 10:30 a.m.	<b>Pre-Conference Workshop</b> The Basics of Supporting Movement Building ( <i>Advance registration required</i> )	<i>Statler A/B</i>
10:30 – 11:30 a.m.	<b>GEO Community Networking and Coffee Hour</b>	<i>South American A/B</i>
12:00 – 2:15 p.m.	<b>Welcome and Opening Plenary Luncheon</b> Mission Before Organization: Making Progress on Childhood Obesity	<i>Congressional/ Senate Ballroom</i>
2:15 – 2:45 p.m.	<b>Break</b>	
2:45 – 4:45 p.m.	<b>Conversations with Movement and Network Leaders</b>	
	Round 1: 2:55 – 3:45 p.m.	Selection: _____
	Round 2: 3:55 – 4:45 p.m.	Selection: _____
	1. Amplifying the Voices of an Immigrant Youth-Led Network	<i>Statler A/B</i>
	2. Building Assets and Ending Payday Lending in Arkansas and Mississippi	<i>Congressional/ Senate Ballroom</i>
	3. Changing the Way People Think, Feel and Act in Support of Families	<i>South American A</i>
	4. Collaborating for Regional Food System Sustainability	<i>Congressional/ Senate Ballroom</i>
5. Winning Marriage Equality Was Decades in the Making. What's Next?	<i>Pan American</i>	
6. Tackling the Most Critical Issues Facing Women, Mothers and Our Communities	<i>South American B</i>	
5:00 – 7:00 p.m.	<b>Networking Reception</b>	<i>North Gate Grill</i>
6:30 – 9:00 p.m.	<b>Evening Film Screening and Discussion With Participant Media</b>	<i>Congressional/ Senate Ballroom</i>

7:30 a.m. – 3:00 p.m.	<b>Registration Desk Open</b>	<i>Upper Lobby North</i>
8:00 – 9:00 a.m.	<b>Networking Breakfast</b>	<i>Congressional/ Senate Ballroom</i>
9:00 – 10:30 a.m.	<b>Breakout Sessions</b>	Selection: _____
	1. Tools for Change: Advancing Your Mission Through Advocacy	<b>South American A</b>
	2. How Can Funders Build the Capacity and Leadership for Movements?	<b>Statler A/B</b>
	3. How Do Grantmakers Support Grassroots Community Organizing and Engagement?	<b>South American B</b>
	4. Evaluation That Supports Learning in Movements	<b>Pan American</b>
10:45 a.m. – 12:15 p.m.	<b>Tools and Strategies for Change</b>	
	<b>Option 1: Breakout Session</b> In Search of Funder Alignment to Build Strong, Agile Movements	<b>South American A</b>
	<b>OR</b>	
	<b>Option 2: Quick-Fire Tools and Techniques Tutorials</b>	
	Round 1: 10:55 – 11:15 a.m.	Selection: _____
	Round 2: 11:25 – 11:45 a.m.	Selection: _____
	Round 3: 11:55 a.m. – 12:15 p.m.	Selection: _____
	• Planning for and Implementing Advocacy	<b>Statler A/B</b>
	• Harnessing the Power of Communications and Social Media	<b>Pan American</b>
	• Using Data and Technology to Organize and Drive Action	<b>South American B</b>
	• Mapping and Assessing Fields and Networks	<b>Congressional/ Senate Ballroom</b>
• Collaborating More Efficiently	<b>Congressional/ Senate Ballroom</b>	
12:45 – 2:30 p.m.	<b>Closing Plenary Luncheon</b> Movement Leaders Speak Out: An Honest Dialogue About What It Takes to Advance a Movement	<b>Congressional/ Senate Ballroom</b>
3:00 – 4:30 p.m.	<b>Post-Conference Workshop</b> Putting Values Into Action: A Case Study Teaching of the Energy Foundation ( <i>Advance registration required</i> )	<b>Statler A/B</b>

## Pre-Conference Workshop

**8:30 – 10:30 a.m.** Statler A/B

### The Basics of Supporting Movement Building

Session designers: Frances Kunreuther and Sean Thomas-Breitfeld, Building Movement Project

Interest in social movements and movement building has been steadily increasing on the part of both grantmakers and advocates for years. Wide ranges of organizations seek to have broader impacts that encompass near-term change as well as the deeper transformation needed to sustain public support over the long term. But changing policies and winning hearts and minds require different strategies and mindsets on the part of both funders and the organizations they support. This interactive pre-conference workshop — facilitated by the co-directors of the Building Movement Project — will orient participants to the basics of social movements and explore the movement-building capacities that organizations need to participate in movements. Hear from participants and speakers about how funders and grantees delineate movement building vs. other types of support, and examples of the potential impact of adopting a movement-building perspective.

#### Speakers:

- Peter Bloch Garcia, Marguerite Casey Foundation
- Frances Kunreuther, Building Movement Project
- Laura McCargar, Perrin Family Foundation
- Sean Thomas-Breitfeld, Building Movement Project

**Advance registration is required. Continental breakfast served.**

## GEO Community Networking and Coffee Hour

**10:30 – 11:30 a.m.** South American A/B

GEO is a vibrant community of more than 440 grantmakers focused on smarter grantmaking, stronger nonprofits and better results. Kick off your conference experience by joining like-minded peers for coffee and informal conversation. Use this time to start conversations that you will continue throughout the gathering and participate in a fun, networking activity that will be sure to help you make enduring connections.





## Welcome and Opening Plenary Luncheon

12:00 – 2:15 p.m. *Congressional/Senate Ballroom*

### Mission Before Organization: Making Progress on Childhood Obesity

In this session, a panel of cross-sector leaders will demonstrate what is possible when we come together to advance a common mission, in this case ending the epidemic of childhood obesity. In this moderated conversation, hear what it took for a group of grantmakers to collaboratively respond to First Lady Michelle Obama's *Let's Move!* initiative by creating and co-funding a complementary effort, the Partnership for a Healthier America. The panelists will share the commitments they've made to help put children and families on a path toward healthier eating and living, as well as how their individual efforts supplement and bolster their aligned work. Panelists will share why they chose a collaborative approach, shifts they've had to make to put a shared mission first, and successes and stumbles they've faced while collectively mobilizing action and broad-based support for reducing childhood obesity.

#### Speakers:



Kelly Dunkin  
The Colorado Health Foundation



Kathleen P. Enright  
Grantmakers for Effective Organizations (moderator)



Lawrence A. Soler  
Partnership for a Healthier America



Loel S. Solomon  
Kaiser Permanente

## Conversations with Movement and Network Leaders

2:45 – 4:45 p.m.

Round 1: 2:55 – 3:45 p.m. | Round 2: 3:55 – 4:45 p.m.

In this session, hear from pairs of nonprofit and philanthropic leaders who work together in movement contexts. Through interactive conversations, participants will have a chance to “get under the hood” of some prominent movements’ goals, structures and prevailing strategies, and discuss what makes them effective. Explore the specific challenges and opportunities that participating organizations face in working with a movement or network orientation, along with their tactics for influencing change. Find out how grantmakers are approaching funding, providing assistance beyond the grant and making shifts in their practice to help these grantees and other movement partners take their work to the next level. During two 50-minute rounds, participants have the opportunity to join two different conversations.

**Choose one conversation for each of the two rounds:**

1. **Amplifying the Voices of an Immigrant Youth-Led Network** (*Statler A/B*)
2. **Building Assets and Ending Payday Lending in Arkansas and Mississippi** (*Congressional/Senate Ballroom*)
3. **Changing the Way People Think, Feel and Act in Support of Families** (*South American A*)
4. **Collaborating for Regional Food System Sustainability** (*Congressional/Senate Ballroom*)
5. **Winning Marriage Equality Was Decades in the Making. What’s Next?** (*Pan American*)
6. **Tackling the Most Critical Issues Facing Women, Mothers and Our Communities** (*South American B*)

Detailed descriptions of each conversation follow on pages 9 – 14.



## 1. Amplifying the Voices of an Immigrant Youth-Led Network

**Statler A/B**

Join this conversation to explore ways in which philanthropy can partner and give voice to a courageous, youth-led movement, operating on a politically charged issue, as well as how organizers have been able to keep the topic alive in our policy debates, media and conversations.

When the federal Development, Relief, and Education for Alien Minors (DREAM) Act failed to pass, a coalition, including the then nascent United We Dream Network, began to reassess its approach to policy change. Rather than only pursue stand-alone legislation, the coalition aimed to reshape and influence the broader movement for immigrant rights. Today, UWD is the largest immigrant youth-led network in the nation, representing 52 organizations in 25 states. In addition to organizing and advocating for comprehensive immigration reform, UWD fights for the dignity and equal treatment of all immigrant youth and families. Unbound Philanthropy, a private, human-rights focused foundation, provided UWD with a variety of resources, including support for management training and coaching, nonpartisan voter engagement and unrestricted funding to support strategic planning, collaboration, and advocacy and coordination. Today, UWD is an outlet enabling immigrant youth to become politically active, and its local affiliates have led successful grassroots campaigns, securing access to in-state tuition in 16 states. The network also successfully pressured President Obama and the U.S. Department of Homeland Security to grant temporary relief from deportation for eligible undocumented youth through Deferred Action for Childhood Arrivals.

### Speakers:

- Annie Hernandez, Youth Philanthropy Connect and Frieda C. Fox Family Foundation (moderator)
- Taryn Higashi, Unbound Philanthropy
- Cristina Jiménez, United We Dream



Credit: United We Dream

## 2. Building Assets and Ending Payday Lending in Arkansas and Mississippi Congressional/Senate Ballroom

Join this conversation to explore the importance of general operating support in movement building, as well as how funders and nonprofits can help advance local legislative change and address the underlying institutions and structures that enable economic injustice to persist.

In July 2009, the last of more than 200 payday lending stores in Arkansas ceased operations. This final closure was the culmination of a six-year effort led by Arkansans Against Abusive Payday Lending, a broad-based coalition of consumers, nonprofits, unions and private businesses that was organized and staffed by Southern Bancorp Community Partners. Pursuing a strategy that engaged all three branches of state government and partnering with powerful allies, such as the Arkansas Attorney General, AAAPL successfully fought to maintain and enforce state constitutional protections against predatory lending — in the face of heavily funded lobbying pressure from industry interest groups. This success was due in large part to the sustained support of several funders who weren't afraid of investing for the long haul, including the Mary Reynolds Babcock Foundation, a family foundation focused on strengthening southeastern U.S. communities. Over the years, the Babcock Foundation has provided critical general operating support to help SBCP achieve its mission, creating new educational and economic opportunities for people with limited resources. Despite the win, the work in Arkansas continues because the legal victory remains vulnerable. SBCP is now working to leverage its experience in Arkansas to tackle payday lending in Mississippi, as well as the complex, interconnected issues that force families and individuals to turn to predatory lending in the first place.

### Speakers:

- Tamika S. Edwards, Southern Bancorp Community Partners
- Wendy Todd, Marin Community Foundation (moderator)
- Gladys Washington, Mary Reynolds Babcock Foundation



Credit: © Jessica Wechter

### 3. Changing the Way People Think, Feel and Act in Support of Families South American A

Join this conversation to discuss the importance of funding inter-connected clusters of organizations to bolster their capacity for collaboration and coordination. And, learn how a network that is grounded in the diverse and real-world experiences of its members and families is able to speak with a collective voice and vision for change.

As national demographics continue to shift, so has the composition of modern American families. Recognizing that no one size or story fits all, Strong Families is a multiyear initiative to change the narrative and ensure that every family has the rights and recognition it needs to thrive. Led by Forward Together and eight other primary partners, Strong Families is an inclusive network that unites more than 100 organizations and individuals focused on a host of issues, such as reproductive justice, immigration, LGBT equality and criminal justice reform. Although allied organizations have distinct constituencies and vantage points, they come together to promote a more holistic and progressive family mindset in our day-to-day conversations, public resource allocations and policies, advocating when and where they can have the most impact. The Compton Foundation, a family foundation focused on leadership and storytelling, funded Strong Families because of its compelling positive vision and networked approach to building a broad base of allies who share a common message framework and come together to amplify their influence.

#### Speakers:

- David Beckman, Pisces Foundation (moderator)
- Maria Elena Perez, Forward Together
- Jennifer Sokolove, Compton Foundation



Credit: Strong Families Initiative, Forward Together

## 4. Collaborating for Regional Food System Sustainability Congressional/Senate Ballroom

Join this conversation to explore the kinds of challenges and opportunities faced by members working in a loosely controlled and emergent network places on its members, as well as how a regionally focused, smaller funder can deliver critical support and attract resources beyond its own giving capacity.

It is widely recognized that our natural resources are overtaxed, obesity and other food-related health problems are commonplace and communities are concerned about their ability to access affordable, sustainable and healthy food. In New England, local philanthropic, nonprofit and academic leaders are working to address these challenges by creating a more resilient regional food system. Food Solutions New England is an emergent learning and action network organized around a single goal: to transform the regional food system into a resilient driver of healthy food, sustainable farming and fishing, and thriving communities. Serving as the backbone organization for FSNE, the University of New Hampshire's Sustainability Institute is working with partners to promote this transformation by 2060. As an active member of the network, the Henry P. Kendall Foundation, a private foundation dedicated to supporting a connected, affordable and healthy food system in New England, is collaborating with the university to promote the development of FSNE. The foundation is helping to leverage additional funding for the design of a robust network by inviting other foundation peers to commit to regional food system engagement. The Kendall Foundation and FSNE are just at the beginning of their network development work and are eager to share challenges and discoveries.

### Speakers:

- Courtney Bourns, Henry P. Kendall Foundation
- Tom Kelly, University of New Hampshire Sustainability Institute
- Michael Renner, Missouri Foundation for Health (moderator)



Credit: © Jessica Weather

## 5. Winning Marriage Equality Was Decades in the Making. What's Next? *Pan American*

Join this conversation to discuss how building trust through deep relationships, paired with long-term flexible funding, helps sustain movements. And, hear how a movement can work at the intersection of different issues and leverage recent successes to push for more comprehensive social justice.

While media have described recent marriage equality victories as “rapid progress,” these wins have, in fact, been decades in the making, and many other issues still impact lesbian, gay, bisexual and transgender people and their families. Over the last 40 years the National Gay and Lesbian Task Force has worked to train activists, strengthen local infrastructure and organize broad-based campaigns for public support on the full range of social, racial and economic justice challenges affecting the LGBT community. Arcus Foundation, a leading funder of social justice that is inclusive of sexual orientation, gender identity and race, has provided the Task Force with continued, multiyear general operating grants, along with support for the development of leadership and organizing capacity to cultivate a more effective and diverse movement that works across social issues. The LGBT movement’s past success is due in part to strong, strategic and long-term relationships among its nonprofits and funders — both institutional and individual donors. Movement leaders are now, amid the excitement of marriage progress, reflecting on the path forward to ensure that nonprofits and philanthropy work to ensure complete equality and opportunity for all.

### Speakers:

- Rea Carey, National Gay and Lesbian Task Force
- Margaret Hall, GreenLight Fund (moderator)
- Kevin Jennings, Arcus Foundation



Credit: National Gay and Lesbian Task Force

## 6. Tackling the Most Critical Issues Facing Women, Mothers and Our Communities

### South American B

Join this conversation to explore how funders can provide network weaving and constituency-building support to a virtual, multi-issue, multi-strategy grassroots network that is bringing the voices of citizens to our nation's leaders and winning major victories.

As policy debates around issues such as gun control, health care and education reform have amplified across the country, the electoral and political tides rapidly shift in our nation's capital and in local statehouses. In this changing environment, MomsRising, a network of more than 1 million members and 100 allied organizations, keeps the public informed and organizes women and mothers to improve both public policy and the national dialogue on issues that are important to America's families, such as maternity and paternity leave, realistic and fair wages and health care for all. Led by campaign directors, mainly moms working out of their homes, MomsRising uses online, on-the-ground, social media and multichannel advocacy efforts to mobilize the public to push for change. Ford Foundation provided MomsRising resources for broadening its network, exchanging ideas with like-minded groups and building constituencies around its key issues. With the support of Ford and other funders, MomsRising has worked in collaboration with an integrated infrastructure of local and national organizations to advance policies, such as paid sick days, refine messaging, increase educational reach and build a broad and diverse base for social change.

#### Speakers:

- Helen Neuborne, Ford Foundation
- Kristin Rowe-Finkbeiner, MomsRising
- Kristy Trautmann, FISA Foundation (moderator)





## Networking Reception

**5:00 – 7:00 p.m.** *North Gate Grill (located in the lobby of the Capital Hilton)*

Enjoy conversation and refreshments all while just steps away from the north gate of the White House. Meet and mingle with conference participants and speakers, members of the conference planning committee, GEO staff and members based in the Washington metropolitan area. On the way in, pick up and fill out a sticky name badge to share questions you hope to explore or areas where you seek input from your colleagues.

## Evening Film Screening and Discussion With Participant Media

**6:30 – 9:00 p.m.** *Congressional/Senate Ballroom*

**Speaker:** Lindsay Guetschow, Participant Media

Film and other media can highlight the complexity of social problems. How might they also ignite social action and have meaningful impact in our communities? Following the networking reception, join Participant Media for a screening and discussion of its newest documentary, *Teach*, which explores America's education system through the eyes, minds and hearts of its most essential resource — teachers. Drawing from its experiences producing more than 40 films, such as *An Inconvenient Truth*, *Waiting for "Superman"* and *Food, Inc.*, Participant Media believes that a good story well told can truly make a difference in how one sees the world. Come explore how popular entertainment can — and often does — push the world forward in a positive way.

*Pre-registration is required and casual dinner fare will be served.*



## Networking Breakfast

**8:00 – 9:00 a.m.** *Congressional/Senate Ballroom*

Enjoy a breakfast buffet as you network with other conference participants and carry on the conversation from the previous day's sessions.

## Breakout Sessions

**9:00 – 10:30 a.m.**

**Choose one of the four concurrent breakout sessions:**

### 1. Tools for Change: Advancing Your Mission Through Advocacy

Session designer: Don André, Campion Foundation

#### **South American A**

Advocacy activities are potent and cost-effective strategies both funders and nonprofits can use to advance their missions. Influencing policies and systems that address root causes is often necessary to make real headway on today's tough issues, and can be extraordinarily effective. Hear experienced practitioners describe a wide range of advocacy approaches they have used successfully to accomplish substantial change. By tapping the experiences of speakers working in multiple issue areas, participants will learn about how grantmakers deploy a range of tools essential for effective advocacy: for example, supporting policy research and development, communicating with and convening policy makers and the general public, achieving big wins through shareholder activism and building a robust grantee advocacy network. This session will also offer participants an opportunity to share their own experiences with advocacy as well as discuss how to increase their organizational and grantees' capacity for doing this work.

#### **Speakers:**

- Don André, Campion Foundation
- Saskia de Boer, Casey Family Programs
- Kris Hermanns, Pride Foundation



## 2. How Can Funders Build the Capacity and Leadership for Movements?

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

### **Statler A/B**

Nonprofits are increasingly being called upon to work in the context of broader movements. This has created new challenges — leaders must balance growing external demands along with ongoing internal demands of running effective organizations, and, at times, they must put the interests of alliances ahead of those of their own organizations. Some funders are developing new strategies to strengthen the capacity of their grantees to work effectively in the context of movements. Others are looking beyond individual grants to ask how they can invest in movements more broadly. This session builds on what we are learning about how funders can strengthen the capacity of organizations and leaders to work effectively in the context of broader social movements.

#### **Speakers:**

- Renee Fazzari, General Service Foundation
- Robin Katcher, Management Assistance Group
- Linda Wood, Evelyn & Walter Haas, Jr. Fund

## 3. How Do Grantmakers Support Grassroots Community Organizing and Engagement?

Session designer: Emily Wexler, Grantmakers for Effective Organizations

### **South American B**

Mobilizing people and their communities can be a powerful strategy in effecting long-lasting social change. Through community organizing and grassroots mobilization, the voices and perspectives of historically marginalized people can help shape policy, advance agendas that address community needs and showcase overlooked strengths and assets. Drawing attention to and fostering the interconnectivity among residents in their communities is not an easy task, but when people work together to pursue a broad range of goals — youth empowerment, neighborhood revitalization, environmental justice, and more — amazing things can happen. This session will explore how grantmakers can support efforts to galvanize people on-the-ground and raise the volume of a community's voice. Speakers will share a range of strategies to support deep community engagement, both by funding organizations that mobilize communities and also engaging in these activities directly. They will also share how their organizations arrived at this commitment to supporting community organizing, lessons they've learned along the way and invite dialogue on what makes this such a compelling priority for grantmakers.

#### **Speakers:**

- Melanie Cervantes, Akonadi Foundation
- Peter Bloch Garcia, Marguerite Casey Foundation
- Heather Peeler, Grantmakers for Effective Organizations (moderator)
- David Portillo, The Denver Foundation

## 4. Evaluation That Supports Learning in Movements

Session designers: Tanya Beer and Julia Coffman, Center for Evaluation Innovation  
**Pan American**

Strategies for collaborative action — in the form of networks, movements, community change initiatives or systems-change efforts — aim to motivate and align multiple actors around shared goals. Contrary to other philanthropic approaches where the funder functions as the “command center” for planning and strategic decision making, these approaches attempt to distribute decision making among many interdependent actors who together shape problems and solutions. In this context, evaluation and learning designed primarily for foundation use misses the opportunity to help whole systems learn and accelerate results. Using examples from real-life grantmaking initiatives, this session will explore the practical side of what evaluative questions, data and approaches to learning actually help independent organizations learn and adapt together.

### Speakers:

- Tanya Beer, Center for Evaluation Innovation
- Julia Coffman, Center for Evaluation Innovation
- Geri Spilka, OMG Center for Collaborative Learning
- Tracy Sturdivant, State Voices

## Tools and Strategies for Change

10:45 a.m. – 12:15 p.m.

Choose one of the two concurrent options:

### Option 1: Breakout Session

## In Search of Funder Alignment to Build Strong, Agile Movements

Session designer: Mary Manuel Tobin, The McKay Foundation  
**South American A**

The *Aligning for Impact* experiment convened 25 diverse civic engagement funders to do what they increasingly demanded of grantees: increase collaboration and coordination in service of shared goals. The common thread among the group of grantmakers, with different missions, issues and geographies, is a focus on supporting movement building via state-based civic engagement infrastructure. They gathered to address challenges in the field and practice strategies for funder alignment to support movement building. Fresh off the first phase of this project, which began in summer 2013, participants and designers in the *Aligning for Impact* experiment will share the nuts and bolts of their collaboration. This interactive session will provide a real-time “case study” — with an honest X-ray into what worked and what didn’t — as well as a chance to tap conference participants’ wisdom on how to fund high-performing networks driving movements for change, and also directly participate in these networks.

### Speakers:

- Steven Cole-Schwartz, SJCS Consulting
- Rebecca Petzel, Groupaya (moderator)
- Lani Shaw, General Service Foundation
- Mary Manuel Tobin, The McKay Foundation

## Option 2: Quick-Fire Tools and Techniques Tutorials

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

Learn about and experiment with a variety of tools and techniques that grantmakers and nonprofits can use to further their movement-oriented efforts — from mapping networks and fields and preparing for and improving advocacy practice to connecting and communicating with stakeholders and using big data to inspire action. This session is designed to give participants a window into what these tools are, how they might be relevant for funders or nonprofits and what it takes to use them.

Over a series of fast-paced rounds, rotate through three 20-minute tutorials. Select from the following 10 options, each paired with discussion with the tool developer. Detailed descriptions follow on pages 19 – 22.

**Choose one conversation for each of the three rounds:**

### Planning for and Implementing Advocacy (Statler A/B)

1. Advocacy Capacity Tool — Susan Hoechstetter, Alliance for Justice
2. Advocacy Progress Planner — David Devlin-Foltz, The Aspen Planning and Evaluation Program at the Aspen Institute

### Harnessing the Power of Communications and Social Media (Pan American)

3. Developing a “Communications Hub” — Lindsay Ryder, Proteus Fund
4. Strategic Frame Analysis — Susan Nall Bales, FrameWorks Institute

### Using Data and Technology to Organize and Drive Action (South American B)

5. NationBuilder — Hilary Doe, NationBuilder
6. Mobilizing Communities in a Connected Age — Laura Efurd, ZeroDivide
7. Using Big Data for Micro-Targeting — Matthew Saniie, Enroll America

### Mapping and Assessing Fields and Networks (Congressional/Senate Ballroom)

8. Strong Field Framework — Debby Bielak, The Bridgespan Group
9. Social Network Analysis — Heather McLeod Grant, McLeod-Grant Advisors

### Collaborating More Efficiently (Congressional/Senate Ballroom)

10. Helping Funders Work Together Better — Seema Shah, Foundation Center

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## Planning for and Implementing Advocacy (Statler A/B)

### 1. Advocacy Capacity Tool

Speaker: Susan Hoechstetter, Alliance for Justice

The Advocacy Capacity Tool is a free online self-assessment that helps nonprofits and coalitions measure and understand their readiness to engage in advocacy, as well as identify skill, knowledge and resource gaps. More than 150 organizations thus far have rated themselves across key capacities useful to running issue campaigns, influencing legislation or engaging in other forms of advocacy. Designed by Alliance for Justice, the ACT helps nonprofits determine the role(s) they are best suited to play in collective advocacy efforts and identify where to seek partners. Nonprofits also use the tool to inform conversations with their funders about needed investments in organizational capacity. Likewise, grantmakers use the ACT to inform their own advocacy practice, assess potential grantees, set evaluation benchmarks and determine opportunities for customized capacity building.

## 2. Advocacy Progress Planner

Speaker: David Devlin-Foltz, The Aspen Planning and Evaluation Program at the Aspen Institute

The Advocacy Progress Planner is a free online tool designed to assist organizations and coalitions in planning for, improving and evaluating advocacy campaigns. The Aspen Planning and Evaluation Program developed the APP, using Julia Coffman's "Composite Logic Model" for advocacy evaluation as its groundwork. Through a series of guiding questions, definitions and examples, the APP assists advocates in clarifying their goals, audiences, operating context and tactics. The tool also helps advocates make realistic predictions about feasible accomplishments, set measurable benchmarks to gauge progress, and have informed conversations about course corrections. The APP is iterative and collaborative, and users can invite partners and funders to view and comment on their plans.

## Harnessing the Power of Communications and Social Media *(Pan American)*

### 3. Developing a "Communications Hub"

Speaker: Lindsay Ryder, Proteus Fund

The Security & Rights Collaborative, a donor collaborative housed at the Proteus Fund, partners with individual donors and foundations to protect rights and liberties that have been impacted by national security policies, addressing issues such as surveillance, profiling, discrimination, torture and accountability. As a core component of its grantmaking strategy, the Security & Rights Collaborative provides ongoing funding for a shared communications infrastructure in order to better enable grantees and allied organizations to engage in policy debates, mobilize their grassroots constituents, collaborate and advocate for policy change. This "Communications Hub" provides daily media clippings, talking points, polling and public opinion updates and opposition messaging analysis, among other resources for rapid-response communications. Access to the hub has led to increased messaging coordination among grantees, along with more sophisticated and proactive communications strategy, resulting in the field's ability to shift the media narrative and reframe public discourse on important security and rights issues.

### 4. Strategic Frame Analysis

Speaker: Susan Nall Bales, FrameWorks Institute

How does framing affect movement building? For more than a decade, the nonprofit FrameWorks Institute has worked to advance the sector's communications capacity by identifying, translating and modeling relevant scholarly research for framing the public discourse about social problems. It has become known for its development of Strategic Frame Analysis™, which roots communications practice in the cognitive and social sciences. FrameWorks designs, commissions, manages and publishes multimethod, multidisciplinary communications research to prepare nonprofit organizations to expand their constituency base, build public will and further public understanding of specific social issues — from early child development and education to immigration, race and environmental health.

## Using Data and Technology to Organize and Drive Action (*South American B*)

### 5. NationBuilder

Speaker: Hilary Doe, NationBuilder

NationBuilder is a community organizing system: a software platform that nonprofits, political campaigns and government agencies use to grow and organize their communities. NationBuilder helps leaders connect with their biggest supporters and move them to action. The software includes websites, a people database, access to national voter information and communication tools, like email, text messaging and social media — all in one system. With the help of NationBuilder, nonprofits and campaigns can remain in constant contact with their donors and volunteers, as well as identify new constituents and supporters to engage through targeted communications and calls to action.

### 6. Mobilizing Communities in a Connected Age

Speaker: Laura Efurd, ZeroDivide

Web 2.0, social media and mobile and cloud computing have become integral to the operations of high-performing organizations. As these technologies become more ubiquitous in our everyday lives, how do nonprofits leverage these tools to achieve their missions, and how do foundations strengthen the quality and quantity of technology-related grantmaking? Using examples from successful community advocacy efforts, ZeroDivide will demonstrate how nonprofits are using tools, such as Twitter, Ushahidi and SMS (text messages) to mobilize and engage community members. This conversation will help funders understand how these tools are changing movement building and make the case for increased and explicit investment in grantees' technology capacity and innovation. Participants will leave with strategies to consider, whether assisting with operational infrastructure, funding technology planning and implementation, investing directly in tool development or funding tech-savvy consultants.

### 7. Using Big Data for Micro-Targeting

Speaker: Matthew Saniie, Enroll America

The success of our nation's new health care plan depends on signing up millions of uninsured people, and Enroll America knows how to find them. The organization's "Get Covered America" is a national education and outreach campaign, whose mission is to maximize the number of uninsured and underinsured Americans who enroll in health care coverage made available by the Affordable Care Act. Using micro-targeted messaging, traditional and new media, grassroots organizing, as well as data analytics tools more commonly associated with political campaigns and consumer retail, Enroll America is testing and sharing best practices for reaching and communicating with a target audience and others who can influence their behavior. In this conversation, learn how the same techniques for mining big data to deliver votes are also being used to tackle real-world challenges, like connecting individuals with the most effective ways to get them "to the front door" to enroll in health coverage. Participants will gain an increased understanding of the potential for the social sector to use big data to better track activities, inform operations and educate and motivate stakeholders.

## Mapping and Assessing Fields and Networks (Congressional/Senate Ballroom)

### 8. Strong Field Framework

Speaker: Debby Bielak, The Bridgespan Group

Recognizing that the social change we seek cannot be realized without a critical mass of organizations and individuals aligned and working effectively toward a common goal, funders and nonprofits are turning to field-building strategies. Developed by the Bridgespan Group for the James Irvine Foundation, the Strong Field Framework enables foundations and nonprofits to assess the strengths and needs of the fields they seek to build, and prioritize their efforts and investments to create the conditions necessary for increased collaboration and progress to happen. The Strong Field Framework offers a process and guiding questions to help a field define its common goal and core values, understand the stakeholders involved in the work, craft a research agenda, and formulate recommendations for strengthening the work.

### 9. Social Network Analysis

Speaker: Heather McLeod Grant, McLeod-Grant Advisors

Understanding how networks function and adapt is becoming increasingly important to the work of social change. Social network analysis is an analytic technique for helping us visualize and measure the networks of social relationships and activities that connect people to one another. In this conversation, learn about several tools to help better diagnose, analyze, visualize and cultivate your networks. Come try out a Healthy Network diagnostic tool and delve deeper into social network mapping and analysis. Leave with insights into how networks are structured to help make better decisions about how to engage key stakeholders, maximize the use of network resources and identify missing members and assets.

## Collaborating More Efficiently (Congressional/Senate Ballroom)

### 10. Helping Funders Work Together Better

Speaker: Seema Shah, Foundation Center

According to new research conducted by the Foundation Center and Monitor Institute, many grantmakers are struggling with challenges in working together, including finding the time needed to manage the collaborative process and develop protocols for sharing information and taking joint action, as well as difficulties in identifying new funding partners. These challenges can ultimately prevent collaborations from moving forward. However, the research also uncovered a range of collaborative tools and technologies that can improve the way funders connect and communicate with each other, their grantees and other partners. Many tools are "off-the-shelf," while others are tailored for philanthropy. Whether you're a Luddite, a digital immigrant or a digital native, in this conversation you are guaranteed to find at least one tech tool that you can adapt and start using immediately to work smarter with colleagues.



## Closing Plenary Luncheon

12:45 – 2:30 p.m. *Congressional/Senate Ballroom*

### **Movement Leaders Speak Out: An Honest Dialogue About What It Takes to Advance a Movement**

How can grantmakers help strengthen and sustain impactful and agile movements? In this moderated conversation, Sarita Gupta of Jobs with Justice and Kierra Johnson of Choice USA, joined by funding partner and session moderator Vanessa Daniel of Groundswell Fund, will discuss some of the ways grantmakers both help and hinder efforts to accelerate policy and systems change. The context in which movements develop and grow is unique when compared with traditional nonprofits. Gupta and Johnson will disclose what is most critical to being an effective funding partner. And, they'll share how they balance growing external demands, like building relationships based on trust with multiple partners and creating a sense of shared mission with others, with the demands of running effective nonprofits. Likewise, Daniel will offer her experiences leading a collaborative funding effort that invests in grassroots organizing, constituency building and cross-movement alliance formation. Each speaker will share perspectives on the importance of taking a long-term view and being adaptable and patient, while providing flexible funding and evaluation and capacity-building support for movement members. The speakers will offer honest reflections on what is working and where there is room for improvement, lifting up inspirational stories from their own organizations and their experiences as members of networks and movements that are achieving real progress.

#### **Speakers:**



Vanessa Daniel  
Groundswell Fund (moderator)



Sarita Gupta  
Jobs with Justice



Kierra Johnson  
Choice USA

# TUESDAY

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## Post-Conference Workshop

3:00 – 4:30 p.m. Statler A/B

### Putting Values Into Action: A Case Study Teaching of the Energy Foundation

Grantmakers that support social movements recognize that the collaborative nature of this work requires a different mindset. *Cracking the Network Code*, a GEO publication written by Jane Wei-Skillern and Nora Silver of UC Berkeley Haas School of Business and Eric Heitz of the Energy Foundation, highlights four principles that illustrate the values grantmakers must bring to this work:

(1) mission, not organization; (2) trust, not control; (3) humility, not brand; and (4) node, not hub. In this post-conference workshop, participants will dig deeper into these principles through a business school format case study teaching of the Energy Foundation. Learn how the Energy Foundation put these values into practice and explore with participants the connections between their experience and your own work. Participants will receive the written case study to read in advance of the workshop.

#### Speakers:

- Craig Appel, Energy Foundation
- Jane Wei-Skillern, UC Berkeley Haas School of Business

*Advance registration and an additional fee are required.*



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GEO publications keep grantmakers informed of the emerging trends, debates and practices from the field of philanthropy.

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You can access digital copies of these and all other GEO publications through our online Resource Library, located at [www.geofunders.org](http://www.geofunders.org).

## RAVE

Positive feedback helps us know what worked well and what to repeat at future conferences. Please take a moment to let us know what was good, great or outstanding about your experience at this event. Tear out and drop your completed card in any of the evaluation collection boxes or hand it to a GEO staff member.



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## RANT

In what ways could this conference be improved? We can't learn from our mistakes unless we know about them, so please share your feedback with us. Tear out and drop your completed card in any of the evaluation collection boxes or hand it to a GEO staff member.

















































**GEO would like to thank the following grantmakers for their support of the *Scaling What Works* initiative, which has made this conference possible:**

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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 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, skill-building workshops, and so much more.

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### Don't miss this upcoming GEO event:

**2014 National Conference • March 10 – 12, 2014 • Los Angeles, Calif.**

Registration is currently open to GEO members, and will open to nonmembers on Dec. 2, 2013.

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