

CONFERENCE PROGRAM

Grantmakers for
Effective
Organizations
presents



2014 GEO NATIONAL CONFERENCE

Smarter Grantmaking.
Stronger Nonprofits.
Better Results.

March 10-12, 2014
Loews Hollywood Hotel
Los Angeles, Calif.

Held in partnership with Southern California
Grantmakers, San Diego Grantmakers,
and Northern California Grantmakers





GEO is a diverse community of more than 450 grantmakers working to reshape the way philanthropy operates. We are committed to advancing smarter grantmaking practices that enable nonprofits to grow stronger and achieve better results. We help grantmakers improve practices in areas that are most critical to nonprofit success: strengthening relationships with grantees, supporting nonprofit resilience, learning for improvement and collaborating for greater impact. More information on GEO and additional resources for grantmakers are available at www.geofunders.org.

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GEO CONFERENCES ARE PAPER-LITE

In an effort to be responsible toward our environment and increase the quality of our resources, GEO limits the printed materials we provide on-site to a program book with agenda and session descriptions. GEO will not provide printed copies of session resources, speaker bios or the participant roster. Visit the social media guide on page 3 to find out how to access these resources.

AMBASSADOR PROGRAM

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

WELCOME

Welcome to Hollywood and GEO's 2014 National Conference, held in partnership with Southern California Grantmakers, San Diego Grantmakers and Northern California Grantmakers. We are rolling out the red carpet to welcome nearly 700 philanthropic leaders for conversations to help advance smarter grantmaking practices that lead to stronger nonprofits and better results.

The conference planning committee has set the stage for learning with a mix of interactive sessions, ample time for networking and peer learning, and opportunities to experience the diversity of Los Angeles and its nonprofit sector. Our hope is that you will come away from this gathering with the connections and resources to lead change within your organization and the broader philanthropic field.

Over the course of the next few days you'll be exposed to fresh ideas and new perspectives from a variety of thought leaders from within and outside the philanthropic sector. Charles Duhigg will help us understand the power of habit and how we can replace current habits with new ones that will improve our work. Carol Larson, Julie Rogers and Rev. Starsky Wilson will share how values have shaped the culture of their organizations and influenced the way they work. Judy

Belk, Premal Shah, Maz Kessler and Kim Laughton will discuss the implications for organized philanthropy of new models and approaches to giving.

We hope you will take advantage of the expanded networking opportunities, like the active hour, dine arounds and networking breakfast, to continue the conversations sparked at the conference. You will also have the chance to experience the Los Angeles artistic community at the welcome reception and explore effective philanthropy in action through site visits to local nonprofits.

This conference is possible only through the support of our sponsors, the creative contributions of our planning committee and the hospitality of our host committee.

Thank you for joining us in Los Angeles, and we hope you connect with new colleagues from the GEO community and have a productive conference.



Kathleen P. Enright
President and CEO
Grantmakers for Effective Organizations

Kristin Lindsey
Conference Planning Committee Chair

CONFERENCE PLANNING COMMITTEE

Kristin Lindsey
Intersector Global Consulting (chair)

Fatima Angeles
The California Wellness Foundation

Michael Brown
The Seattle Foundation

Dannielle Campos
The Bank of America Charitable Foundation, Inc.

Lisa Jackson
New Profit Inc.

Aaron Jacobs
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Donors Forum

Claire Peeps
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Danielle Reyes
The Eugene and Agnes E. Meyer Foundation

Brenda Solorzano
Blue Shield of California Foundation

Angela Webster
Lotte & John Hecht Memorial Foundation

Nicole Wynter
Waco Foundation

SESSION TRACKS

Conference sessions fall into content tracks that cover topics identified by GEO and experts in the field as contributing to nonprofit success. Tracks are indicated in the program with one of the icons below:



COLLABORATIVE PROBLEM SOLVING

Explore how grantmakers can best partner with others to grow impact, including the values and practices needed to be an effective partner in collective efforts.



EVALUATION AND LEARNING

Discuss how grantmakers can use evaluation and learning to make real-time improvements to our work and create a learning culture within our organizations and in relationships with grantees.



CAPACITY BUILDING AND FINANCIAL SUSTAINABILITY

Delve into what grantmakers are learning about how best to support nonprofit sustainability and capacity, and how we can build upon those successes.



STAKEHOLDER ENGAGEMENT

Examine how grantmakers can best tap the wisdom and experiences of grantees and other partners to improve grantmaking, and the tactics and tools available to help us do this better.



NETWORKING

Interact with peers and build connections that will help you turn learning into action.

SOCIAL MEDIA GUIDE



CONFERENCE APP

Participant roster, facilitator bios, session resources and more. All the conference information you need is all in one place and available on the go with the conference app.

Download the app from the Apple App Store or from Google Play, or click on the download link at www.geofunders.org/2014geo.

For instructions on how to vote for Encore Sessions using the conference app, see page 21.

CONFERENCE WEBSITE

www.geofunders.org/2014geo

If you don't have a smartphone or tablet, you can still access the online program, session resources, speaker bios and participant roster through the GEO website. Check back after the conference for highlights and videos from the event.



TWITTER

#2014GEO

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 updates during the conference and for news, resources and opportunities throughout the year. Also, find other conference participants on Twitter using our Twitter list "[participants of #2014GEO](#)."



THE HUFFINGTON POST

www.huffingtonpost.com/kathleen-p-enright

GEO President and CEO Kathleen Enright shares her own insights on nonprofit effectiveness as a contributor to *The Huffington Post*.



LINKEDIN

bit.ly/2014geo

GEO members are invited to join our LinkedIn conference subgroup, to connect with other members and to exchange news and ideas that don't quite fit into 140 characters.



FACEBOOK

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 *GEO*News, view upcoming events and share your own comments.

SCHEDULE AT A GLANCE

MONDAY, MARCH 10, 2014

Registration is open from 8:30 a.m. to 6:00 p.m. at the Mezzanine Registration Desk.

9:30 – 11:30 A.M. | PRECONFERENCE WORKSHOPS

Advance registration is required for all workshops.

- W1:** Getting to Know the GEO Community (STUDIO D/E) 🚫
- W2:** Lights, Camera, Social Action: The Power of Storytelling through Media in Driving Change (DOHENY-BEACHWOOD) 😊

12:00 – 2:00 P.M. | OPENING PLENARY LUNCHEON

Closing the Knowing-Doing Gap with Charles Duhigg (THE RAY DOLBY BALLROOM)

2:30 – 4:00 P.M. | BREAKOUT SESSIONS ROUND A

- A1:** Funding for Success: The Cost of Achieving Outcomes (STUDIO A/B) 💰
- A2:** Donor Collaboration: What Works and Why Bother (STUDIO C) 😊
- A3:** Actions Speak Louder Than Words: Considering the Connection between Values and Practice (LOS FELIZ) 🗣️
- A4:** Philanthropy R&D (STUDIO D/E) 🗣️
- A5:** Simplifying Complex Learning Techniques for Small-Staff Grantmakers (ECHO PARK) 🗣️
- A6:** An Rx for Health Reform: How Philanthropy and Government Collaboration Can Drive Policy Implementation (RUNYON-LAUREL) 😊
- A7:** Technology Tools for Funder Collaboration (MT. OLYMPUS) 😊
- A8:** How Can Funders Build the Capacity and Leadership of Movements? (DOHENY-BEACHWOOD) 😊

4:30 – 5:30 P.M. | ACTIVE HOUR 🚫

6:00 – 8:00 P.M. | WELCOME RECEPTION (THE ANNEX) 🚫

Looking for a quiet spot to connect with others in our community? Find your peers in the Member Lounge located in Suite 329. While you're there, check out GEO's newly redesigned website and take a few minutes to sign up for your member access account or peruse GEO's digital Resource Library. The Member Lounge is open:

- Monday from 8:30 a.m. to 6:00 p.m.
- Tuesday from 8:00 a.m. to 6:00 p.m.
- Wednesday from 7:00 a.m. to 12:30 p.m.

GEO MEMBER LOUNGE

TUESDAY, MARCH 11, 2014

Registration is open from 8:00 a.m. to 5:00 p.m. at the Mezzanine Registration Desk.

8:30 – 9:45 A.M. | BREAKFAST PLENARY

The Heart of the Matter: A Conversation with Foundation Leaders on Putting Values at the Center (THE RAY DOLBY BALLROOM)

10:15 A.M. – 12:00 P.M. | SHORT TALKS

ROUND 1 | 10:15 – 10:40 A.M.

- 1A:** New Directions and Serious Fun: 21st-Century Philanthropy
Ken Brecher, The Library Foundation of Los Angeles (STUDIO A/B)
- 1B:** Master Narratives: The Stories That Move Americans
Andy Goodman, The Goodman Center (STUDIO C)
- 1C:** Did I Make a Bad Grant, or Did I Make a Grant Badly?
Mae Hong, Rockefeller Philanthropy Advisors (STUDIO D/E)

ROUND 2 | 10:55 – 11:20 A.M.

- 2A:** Objects in the Mirror Are Closer Than They Appear
Jill Violet, Playworks (STUDIO A/B)
- 2B:** Transactions, Transformations, Translations: The Metrics of Movement Building
Manuel Pastor, University of Southern California (STUDIO C)
- 2C:** Is the Cult of Sustainability Sustainable?
Gregory Rodriguez, Zócalo Public Square (STUDIO D/E)

ROUND 3 | 11:35 A.M. – 12:00 P.M.

- 3A:** In God We Trust, Everyone Else Bring Data
Linda Gibbs, Bloomberg Associates (STUDIO A/B)
- 3B:** Scaling Success
Patrick McCarthy, The Annie E. Casey Foundation (STUDIO C)
- 3C:** The Freedom to Lead
Dan Cardinali, Communities In Schools (STUDIO D/E)

12:15 – 1:45 P.M. | DISCUSSION GROUPS OVER LUNCH

(THE RAY DOLBY BALLROOM) 🚫

SCHEDULE AT A GLANCE

LEGEND

- 🤝 COLLABORATIVE PROBLEM SOLVING
- 🎯 EVALUATION AND LEARNING
- 💰 CAPACITY BUILDING AND FINANCIAL SUSTAINABILITY
- 🗣️ STAKEHOLDER ENGAGEMENT
- 🌐 NETWORKING

For more details about session tracks, see page 3.

WEDNESDAY, MARCH 12, 2014

Registration is open from 7:00 a.m. to 2:00 p.m. at the Mezzanine Registration Desk.

2:00 – 5:30 P.M. | SITE VISITS TO LOCAL NONPROFITS (OFF-SITE)

2:00 – 3:30 P.M. | BREAKOUT SESSIONS ROUND B

- B1:** Integrating a Nonprofit Capacity-Building Lens into a Grantmaker's Culture (STUDIO A/B) 💰
- B2:** Overhead Myth Busters: Advocating to Eliminate Overhead Restrictions (DOHENY-BEACHWOOD) 💰
- B3:** Effective Engagement Strategies for Small Foundations (MT. OLYMPUS) 🗣️
- B4:** Learning from Local Networks: Collaborative Approaches for Community-Focused Grantmakers (RUNYON-LAUREL) 🤝
- B5:** The Future of California Elections: A Story of Collaborative Impact (ECHO PARK) 🤝
- B6:** Embracing Messiness: A Framework and Tools for Evaluating Collective Impact (STUDIO D/E) 🎯
- B7:** Would Gandhi, Chavez or King Receive a Grant Today? Benefits and Limits of Measuring Philanthropic Impact (STUDIO C) 🎯

4:00 – 5:30 P.M. | BREAKOUT SESSIONS ROUND C

- C1:** Nonprofit Capacity Building 3.0: The Next Frontier for Funders (STUDIO A/B) 💰
- C2:** Design Doing: Increasing Funder Impact through Design Thinking (RUNYON-LAUREL) 🗣️
- C3:** We Are All Disaster Funders (ECHO PARK) 🤝
- C4:** Building a Better Mousetrap: Using Field Scans to Enhance Collective Action (MT. OLYMPUS) 🤝
- C5:** Intelligent Failure: Practical Tools for Building a Culture of Learning and Innovation (STUDIO C) 🎯
- C6:** Social Media Beyond Vanity Metrics: Leveraging Social Media to Strengthen Foundation Strategy (DOHENY-BEACHWOOD) 🗣️
- C7:** Ingredients for Impact: Foundations Building Nonprofit Capacity and Real Results (STUDIO D/E) 💰

6:00 – 8:00 P.M. | DINE AROUNDS (OFF-SITE) 🌐

7:30 – 8:30 A.M. | NETWORKING BREAKFAST (THE RAY DOLBY BALLROOM) 🌐

8:30 – 10:00 A.M. | BREAKOUT SESSIONS ROUND D

- D1:** Lessons Learned in Investing in Leadership (STUDIO A/B) 💰
- D2:** Net Work, Net Equity and Emergence: Getting It Right from the Start (MT. OLYMPUS) 🗣️
- D3:** The Power of Partnership: Networked Approaches to Supporting Nonprofit Capacity and Leadership (STUDIO C) 💰
- D4:** Embedding Learning and Evaluation in the Grantmaking Cycle (RUNYON-LAUREL) 🎯
- D5:** The youthCONNECT Initiative — Developing and Implementing the Common Outcomes Framework, a Shared Measurement Approach (DOHENY-BEACHWOOD) 🎯
- D6:** From Concept to Community Groundswell: Communications Builds Support for Grade-Level Reading (ECHO PARK) 🤝
- D7:** Working Well with Grantees: Recommendations for Foundation Program Staff (STUDIO D/E) 🗣️

10:30 A.M. – 12:00 P.M. | BREAKOUT SESSIONS ROUND E AND ENCORE SESSIONS

- E1:** Working with Residents to Strengthen Communities: What It Takes (STUDIO A/B) 🗣️
- E2:** Cracking the Network Code: Four Principles for Grantmakers (ECHO PARK) 🤝
- E3:** A Road Map for Evaluating Comprehensive Community Grantmaking (STUDIO C) 🎯
- E4:** It Takes Two to Tango: Nonprofit Capacity through Mergers and Other Partnerships (STUDIO D/E) 💰
- Encore Sessions:** Too many options to choose from? Based on participants' votes, GEO will invite back a limited number of speakers to repeat their sessions from rounds A, B or C. Find voting instructions and the list of applicable sessions on p. 21.
- E5:** Encore 1 — Determined by your vote (MT. OLYMPUS)
- E6:** Encore 2 — Determined by your vote (DOHENY-BEACHWOOD)
- E7:** Encore 3 — Determined by your vote (RUNYON-LAUREL)

12:15 – 2:00 P.M. | CLOSING PLENARY LUNCHEON

Giving Smarter? Exploring New Philanthropic Models and Their Impact (THE RAY DOLBY BALLROOM)

MONDAY MARCH 10

9:30 – 11:30 A.M. | PRECONFERENCE WORKSHOPS

Advance registration is required for all workshops.

🌀 **W1: Getting to Know the GEO Community**

Session Designer: Jason Twiss, GEO

Location: Studio D/E

GEO is a vibrant community of more than 400 grantmakers focused on smarter grantmaking, stronger nonprofits and better results. Where does your organization fit in? Kick off your conference experience by attending this session designed for first-time conference attendees and new GEO members. Learn more about the values and core practices that underlie GEO's work and how we support the work of our members. Through a speed-networking activity as well as more informal conversations, you will meet like-minded peers and share common questions and challenges you are encountering in your work.

Speakers:

- J McCray, GEO
- Jason Twiss, GEO

🎥 **W2: Lights, Camera, Social Action: The Power of Storytelling through Media in Driving Change**

Location: Doheny-Beachwood

Participant Media is a Los Angeles-based production company founded in 2004 by Jeff Skoll to focus on feature film, television, publishing and digital content that inspires social change. Through its films, social action campaigns, digital network TakePart.com, and Pivot, its new television network for millennials, Participant seeks to entertain, encourage and empower every individual to take action. Learn how Participant uses these platforms to tell stories that mobilize action, how it measures the impact of this work, and the role philanthropy and other partners play in advancing this work.

Speakers:

- Dannielle Campos, The Bank of America Charitable Foundation, Inc.
- Alden Stoner, Participant Media

12:00 – 2:00 P.M. | OPENING PLENARY LUNCHEON

Closing the Knowing-Doing Gap

Location: The Ray Dolby Ballroom

The members of the GEO community know what practices have the greatest impact on nonprofits, yet years of data from GEO's field surveys show that change happens very slowly in our field. How do we make the leap from knowing what our organizations should be doing to actually doing it? Charles Duhigg is a *New York Times* reporter who has spent more than a decade studying habits. His book, *The Power of Habit: Why We Do What We Do in Life and Business* explores the science behind why habits exist and how to change them. In this session, Duhigg will make the case that the key to building strong organizations and social movements and growing impact is understanding how habits work and how we can harness this understanding to transform our organizations and communities.

Opening Remarks:



Kristin Lindsey,
Chair of Conference Planning Committee

Speaker:



Charles Duhigg,
journalist and author of *The Power of Habit:
Why We Do What We Do in Life and Business*



- 🤝 COLLABORATIVE PROBLEM SOLVING
- 🎯 EVALUATION AND LEARNING
- 💰 CAPACITY BUILDING AND FINANCIAL SUSTAINABILITY
- 🗣️ STAKEHOLDER ENGAGEMENT
- 🌐 NETWORKING

2:30 – 4:00 P.M. | BREAKOUT SESSIONS ROUND A

💰 **A1: Funding for Success: The Cost of Achieving Outcomes**

Session Designer: Valerie Lies, Donors Forum

Location: Studio A/B

What do good outcomes cost? In a world where grantmakers increasingly seek to tie funding to outcomes, answering this question is both critical and vexing. Many funders' policies and practices do not yet support the full costs of achieving outcomes, or, in many cases, even outputs. That limiting investment in overhead and infrastructure can get in the way of strong program results. Changing funder policies will not be enough, however. Nonprofit leaders and foundations staff must deepen their understanding of nonprofit costs, as well as leverage the trust between them to have difficult conversations. How? This session will explore the work of the "Real Talk About Real Costs" nonprofit and grantmaker cohort, and engage participants in answering this important question and considering how it aligns with their grantmaking philosophy and practice.

Speakers:

- Ann Goggins Gregory, The Bridgespan Group
- Valerie Lies, Donors Forum
- Unmi Song, Lloyd A. Fry Foundation

🤝 **A2: Donor Collaboration: What Works and Why Bother**

Session Designer: Diana Scearce, The David and Lucile Packard Foundation

Location: Studio C

In a time when the complexity and scale of many social and environmental problems continue to grow, and the need for nonprofit services is on the rise, philanthropic collaboration becomes even more important. Whether through accessing expertise, pursuing system-level change or aggregating growth capital, many donors are exploring the potential to accomplish more through aligned action than they are capable of on their own. Drawing from insights raised in a Bridgespan study of donor collaboration at the Packard Foundation, this session will explore different ways that foundations can work together and engage participants in a discussion around stories of successes and failures as well as what practical tools can apply to their work.

Speakers:

- Diana Scearce, The David and Lucile Packard Foundation
- Willa Seldon, The Bridgespan Group

🗣️ **A3: Actions Speak Louder Than Words: Considering the Connection between Values and Practice**

Session Designers: Jessica Bearman, Bearman Consulting, and Christine Reeves, National Committee for Responsive Philanthropy

Location: Los Feliz

A grantmaker's application and reporting practices are often the first — and sometimes the only — thing a grantseeker experiences as evidence of a grantmaker's values and its orientation toward its nonprofit partners. In many cases, practices and values are woefully discordant. A grantmaker may believe it treasures and trusts its grantees, but its quarterly reporting requirements say otherwise. A grantmaker may want to support nonprofit effectiveness but inadvertently waste hours of precious time with a poorly designed grantmaking system or budget template. In this session participants will explore the connection between foundation values and the concrete grantmaking practices that make the biggest difference to nonprofits. Learn why the Unitarian Universalist Veatch Program at Shelter Rock stopped asking grantees to submit budgets with their proposals and how that has changed the grantmaker-grantee relationship. Leave the session with specific strategies and practical ideas for streamlining changes in your own organization.

Speakers:

- Jessica Bearman, Bearman Consulting
- Carol Cantwell, Fun with Financials
- Molly Schultz Hafid, Unitarian Universalist Veatch Program at Shelter Rock

🗣️ **A4: Philanthropy R&D**

Session Designer: Carrie Avery, The Durfee Foundation

Location: Studio D/E

Business recognizes the need for research and development to keep ahead of the curve. The complex issues philanthropy seeks to address require both creative thinking and innovation, yet funders often ask grantees to define projected outcomes at the beginning of a project and report progress on those fixed goals, allowing little room for learning and adaptation. How can funders use the R&D model to focus innovation while ensuring that the creative process results in a desired outcome? In this session, participants will hear from both grantees and funders about the benefits and challenges of approaching grantmaking with a more open mindset, engaging in a rigorous but adaptive approach that allows for new outcomes to emerge.

Speakers:

- Carrie Avery, The Durfee Foundation
- Matt Foreman, Evelyn & Walter Haas, Jr. Fund
- Aaron Paley, CicLAvia
- Amy Simon, Goodwin Simon Strategic Research
- Jeff Ubois, John D. and Catherine T. MacArthur Foundation

🕒 **A5: Simplifying Complex Learning Techniques for Small-Staff Grantmakers**

Session Designer: Sara Beggs, Association of Small Foundations

Location: Echo Park

Developmental evaluation is a hot topic in the field of philanthropy and innovation. It combines the critical thinking of evaluation with the practices of organizational development that help groups manage change strategies and strengthen relationships. Yet most examples present developmental evaluation as a tool for big funders, big spenders (on consultants!) and big efforts. However, small-staff foundations with a clear focus and a desire to engage with others to find effective solutions in complex areas may find the same techniques to be highly useful. In fact, they may find themselves in a prime position to practice specific techniques such as intentionally engaging key stakeholders, facilitating real conversation and developing real-time learning. Throughout this session, we will explore questions such as these: What are the key components of developmental evaluation and when might they be most useful? What skills might a foundation leader need or want to learn in order to apply these techniques more effectively?

Speakers:

- John Bare, The Arthur M. Blank Family Foundation
- Sara Beggs, Association of Small Foundations

🕒 **A6: An Rx for Health Reform: How Philanthropy and Government Collaboration Can Drive Policy Implementation**

Session Designer: Brenda Solórzano, Blue Shield of California Foundation

Location: Runyon-Laurel

The passage of the Affordable Care Act was monumental, but getting it successfully implemented has proven to be a Herculean effort. In California, several health foundations have been working closely with local and state policymakers to help ensure successful implementation of the ACA at the state and local levels. This collaboration has included grants to government, research to inform policymaker decisions, technical assistance to policymakers, grantwriting support to obtain federal funding, and support for the evaluation needs of policymakers. In this session, you will hear from two foundations and a former policymaker about the successes, failures and lessons learned from their engagement in this collaboration. Participants will receive practical suggestions and ideas for how foundations can effectively partner with government to

successfully implement policy and will have an opportunity to engage in the conversation by sharing their own experiences in partnering with government.

Speakers:

- Richard Figueroa, The California Endowment
- Len Finocchio, formerly of the California Department of Health Care Services
- Richard Thomason, Blue Shield of California Foundation

🕒 **A7: Technology Tools for Funder Collaboration**

Session Designer: Lisa Philp, Foundation Center

Location: Mt. Olympus

Technology tools are fundamentally changing the way funders are able to work together. A joint investigation by the Monitor Institute and the Foundation Center has uncovered a range of collaborative technologies that can improve the way funders connect and communicate. Many are “off the shelf,” while others are tailored for philanthropy. Whether you’re a Luddite, a digital immigrant or a digital native, join us for a dynamic session to learn about tech tools that can help you work smarter with your colleagues.

Speakers:

- Gabriel Kasper, Monitor Institute
- Lisa Philp, Foundation Center

🕒 **A8: How Can Funders Build the Capacity and Leadership of Movements?**

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

Location: Doheny-Beachwood

As nonprofits increasingly align their work in the context of broader social movements, new leadership challenges arise — 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:

- Ellen Friedman, Compton Foundation
- Robin Katcher, Management Assistance Group
- Pamela Shifman, NoVo Foundation
- Linda Wood, Evelyn and Walter Haas, Jr. Fund

- 🔄 COLLABORATIVE PROBLEM SOLVING
- 🎯 EVALUATION AND LEARNING
- 💰 CAPACITY BUILDING AND FINANCIAL SUSTAINABILITY
- 🗣️ STAKEHOLDER ENGAGEMENT
- 🌐 NETWORKING

MARCH 10 MONDAY

4:30 – 5:30 P.M. | ACTIVE HOUR 🌐

With great content and thought-provoking conversations, we all know that conferences can sometimes exhaust the mind. Following the first day of programming, we invite you to stretch your legs and take a break during GEO's first-ever Active Hour. Quiet your mind with a yoga class, taught by a local instructor. Or join a tour guide for a stroll down the Hollywood Walk of Fame. Grab your camera, find your favorite celebrity's star and soak in the Hollywood atmosphere.

Preregistration is required for both activities, and mats will be provided for the yoga class. To learn more and to sign up, please visit the conference registration desk.



6:00 – 8:00 P.M. | WELCOME RECEPTION 🌐

The Annex



GEO and the conference host committee welcome you to Los Angeles! To kick off the 2014 National Conference, please join us for an evening of networking, cocktails and light refreshments.

At the surface, Los Angeles is an expansive city full of car-filled freeways and Hollywood entertainment. But, if you look a bit deeper you will see a magnificent blend of arts, histories and cultures. During the reception, participants will experience a taste of L.A. culture by “visiting” various local neighborhoods. The reception will feature live entertainment by Magnolia Memoir and artist exhibitions that dive further into LA's arts world.

Although not comprehensive, we hope tonight will give you a taste of the great diversity and artistic influence Los Angeles provides to the world.



The welcome reception will be held in The Annex, located on the fifth floor of the hotel complex. To get to the reception, take the elevator to the fifth floor, walk past the pool area, turn left and cross the archway. Don't forget to wear your conference badge! Only conference participants and their preregistered guests will be allowed to enter.

Following the reception, you may also want to stroll through the Hollywood & Highland Center, which offers plenty to see and do. There are more than 80 shops, 26 restaurants and eateries, two nightclubs, seven movie screens, eight bars and 12 bowling lanes.

8:30 – 9:45 A.M. | BREAKFAST PLENARY

Location: The Ray Dolby Ballroom

The Heart of the Matter: A Conversation with Foundation Leaders on Putting Values at the Center

For 15 years, GEO has been focused on grantmaker practices that make a difference to grantees. However, effective practices are unlikely to take hold if the organization does not subscribe to a certain set of values as a guide. What are the core values a grantmaker should embrace? How do these values play out in actions large and small? In this conversation, three foundation leaders will explore the intersection of values and actions, sharing stories of how their foundations developed and stayed committed to values and culture that prioritize serving the needs of grantees.

Introductory Remarks:



Albert Ruesga,
Greater New Orleans Foundation

Speakers:



Kathleen P. Enright,
Grantmakers for Effective Organizations
(moderator)



Carol Larson,
The David and Lucile Packard Foundation



Julie Rogers,
The Eugene and Agnes E. Meyer Foundation



Rev. Starsky Wilson,
Deaconess Foundation

10:15 A.M. – 12:00 P.M. | SHORT TALKS

Short talk presentations are designed to share provocative ideas and new perspectives from thought leaders within and outside of philanthropy. Participants have the opportunity to join up to three short talks by selecting one topic during each of the three rounds.

Time Slot	Studio A/B	Studio C	Studio D/E
Round 1 10:15 – 10:40	1A. Ken Brecher	1B. Andy Goodman	1C. Mae Hong
Round 2 10:55 – 11:20	2A. Jill Vialet	2B. Manuel Pastor	2C. Gregory Rodriguez
Round 3 11:35 – 12:00	3A. Linda Gibbs	3B. Patrick McCarthy	3C. Dan Cardinali

ROUND 1 | 10:15 – 10:40 A.M.

1A. New Directions and Serious Fun: 21st-Century Philanthropy



Ken Brecher, The Library Foundation
of Los Angeles

Let's try to reimagine philanthropy for the 21st century. How might we redefine what is meant by *impact* and *accountability*? What if fostering justice, articulating the truth and inspiring grantees were inherent in the metrics by which our own success was being evaluated? What might we learn about philanthropy (and ourselves) if we were encouraged to make the least likely people our teachers? An anthropologist (who has twice been a foundation president) discusses where he has been looking for courage and finding both new directions and serious fun.

1B. Master Narratives: The Stories That Move Americans



Andy Goodman, The Goodman Center

Stories are the software of the brain, strongly influencing which facts we let in and which we choose to ignore. Changing how Americans think and behave often comes down to replacing one story with a new, more powerful narrative. In this short talk, Andy Goodman will identify "master narratives" in American life — stories that run so deeply through the culture that we may not even be consciously aware of them, but they are constantly shaping the debate on crucial issues, and any story we tell to advance our causes will be tested against them.

1C. Did I Make a Bad Grant, or Did I Make a Grant Badly?



Mae Hong, Rockefeller Philanthropy Advisors

For all the hand-wringing and hair pulling we do about our grantees' evaluation results, funders seldom pause to reflect about their own culpability in their grantees' lack of success. When we are disappointed by what a grantee achieves with our funding, we console ourselves with "what we learned" and pat ourselves on the back for having "taken a risk" on something. But we don't ask ourselves, "How was my grant responsible for this outcome?" or "What might I have done differently to help contribute to success?" Mae Hong will encourage participants to change the questions we ask grantees and ourselves.

ROUND 2 | 10:55 – 11:20 A.M.

2A. Objects in the Mirror Are Closer Than They Appear



Jill Vialet, Playworks

While most of the national discussion around education reform focuses on the insurmountable problems we face, Jill Vialet's experiences of working in schools throughout the United States to bring back recess have led her to a quite different conclusion. In this talk, Vialet will look at the research — and her experiences growing Playworks — to explore the possibility that we actually know much of what is required to build schools that work for children, and that doing so is well within our reach.

2B. Transactions, Transformations, Translations: The Metrics of Movement Building



Manuel Pastor, University of Southern California

Social movements change narratives as well as policies, hearts as well as minds. But ultimately, one needs to demonstrate impact, particularly in a philanthropic world that is increasingly evidence driven. In this talk, Pastor presents the key elements of movement building and discusses how to capture the magic of social and personal transformation, translate that to funders and the broader public, and evaluate groups based on not just organizational effectiveness but movement effectiveness.

2C. Is the Cult of Sustainability Sustainable?



Gregory Rodriguez, Zócalo Public Square

The concept of sustainability emerged from the environmental conservation movement and is now used, effectively, by a variety of groups and institutions in planning for the long term. But over the past few years, and particularly since the 2008 financial crisis, the idea of sustainability has gained such a hold in the philanthropy world, that it has the potential to cause more harm than good. With every prospective grant, donation or partnership, nonprofit fundraisers must brace themselves for the inevitable question: Are you sustainable? There is only one right answer. But how might Clara Barton have responded were she forced to field this query about the American Red Cross in 1881? Foundations clearly want to make investments that are impactful in the long term. Nonprofit organizations clearly want to solve the problems they set out to tackle. But at what point does our sustainability fixation discourage innovation, creative thinking and risk taking? And could it undermine the very concept of philanthropy in the long run? Gregory Rodriguez, founder, publisher and executive director of Zócalo Public Square, discusses whether the cult of sustainability can — and should — last.

ROUND 3 | 11:35 A.M. – 12:00 P.M.

3A. In God We Trust, Everyone Else Bring Data



Linda Gibbs, Bloomberg Associates

Increasingly, there is strong evidence of what works in social policy and more refined tools to apply those lessons to improve outcomes for clients served. Yet access to that knowledge is limited, and using it in practice has met resistance. This talk will discuss why evidence-based practice is important, how it can spread and how to incorporate consideration for the difficult-to-measure elements of impact.

3B. Scaling Success



Patrick McCarthy, The Annie E. Casey Foundation

We are already great at scaling. Unfortunately, the things we are most adept at scaling are those that don't work. As a result, we achieve failure at alarming rates. Patrick McCarthy will challenge us to set our sights on achieving success at the same level. He'll share lessons learned about how foundations can invest in evidence building, advocacy, systems change and strategic finance in order to achieve the most — and the most lasting — impact to make scaling success a reachable goal.

3C. The Freedom to Lead



Dan Cardinali, Communities In Schools

At this moment, philanthropy is confronted with an essential leadership opportunity — one that can affect communities and lives across America. As public funding stagnates, and increased poverty and changing demographics boost demand for nonprofit services, the role of America's nonprofits is quickly shifting. This session will address key areas that philanthropy must wrestle with, from making changes in financial support to working in true partnerships with grantees, in order to play a leadership role in enabling the nonprofit sector to unleash the impact we desire to make.

12:15 – 1:45 P.M. | DISCUSSION GROUPS OVER LUNCH ☺

Location: The Ray Dolby Ballroom

We've heard from you that one of the greatest benefits of GEO conferences is being able to connect with a community of like-minded colleagues. Grab a boxed lunch and join a discussion group with a short talk speaker to dig deeper into their presentations and answer your burning questions. Or form a group of your own to discuss your own top-of-mind issues. During this session you can do one of the following:

Continue a conversation with a short talk speaker:

- Ken Brecher, The Library Foundation of Los Angeles
- Dan Cardinali, Communities In Schools
- Andy Goodman, The Goodman Center
- Linda Gibbs, Bloomberg Associates
- Mae Hong, Rockefeller Philanthropy Advisors
- Patrick McCarthy, The Annie E. Casey Foundation
- Manuel Pastor, University of Southern California
- Gregory Rodriguez, Zócalo Public Square
- Jill Vialet, Playworks

Form or join a small-group discussion to explore a shared topic of interest. Join one of the conversations listed below or head to The Ray Dolby Ballroom to see what other options are available. If you would like to host a discussion group, please add your name and topic to the list in the registration area by 10:00 a.m. on Tuesday.

- Transformative Scale: Pathways to Growing What Works
Jeff Bradach, The Bridgespan Group
(The Ray Dolby Ballroom Salon 4)
- TripAdvisor for Foundations
Jan Masaoka, California Association of Nonprofits and
co-facilitator J McCray, Grantmakers for Effective Organizations

Meet with the colleagues you were hoping to see at the conference to discuss a topic of your choice.



2:00 – 5:30 P.M. SITE VISITS TO LOCAL NONPROFITS

Nonprofit site visits are a key way in which conference participants can get a flavor for the work being done in Los Angeles. Participants will be able to take the time walk in the shoes of nonprofit leaders, reflect on what they are learning at the conference and put ideas into perspective. Site visits offer an opportunity to explore some of the leading nonprofits in the Los Angeles area. Learn about the mission, strategies, challenges and accomplishments of these organizations and how they operate within Los Angeles' innovative philanthropic community.

- Register for site visits at the registration desk on the Mezzanine Level.
- Space is limited, so sign up early.
- Please meet your group in the Lobby at 2:00 p.m.
- Buses will depart promptly at 2:15.

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- 💰 CAPACITY BUILDING AND FINANCIAL SUSTAINABILITY
- 🗣️ STAKEHOLDER ENGAGEMENT
- 🌐 NETWORKING



Many Funders, One Mission

Visit the **Downtown Women's Center**, a nationally recognized model for ending the cycle of homelessness among women. Join DWC staff and local grantmakers in a discussion about various funding initiatives that have helped 95 percent of the women the Center houses not return to homelessness. Participants will tour the Center's drop-in day center, permanent supportive residence, medical and mental health clinic, and social enterprise boutique — all co-located within a historically preserved, LEED Silver building. Participants will also hear how local funders have supported such innovations as launching a job-training social enterprise, a pilot of Critical Time Intervention on the West Coast and research into effective services for elderly homeless individuals.

Why Networks Matter

Visit **Magnolia Family Center** and learn what a network looks like in real life. A panel including a network partner, community ambassador and a grantmaker will introduce you to the Magnolia Community Initiative — a bold, innovative effort which showcases how a network of 75 Los Angeles agencies and local residents is working to leverage their efforts and bring about dynamic, impactful, scalable change. MCI unites public and private organizations to change how they think and act and it helps residents and parents create a social movement with the ultimate goal of improving outcomes for the 35,000 children and youth living in a 500 block area. The group will tour the one-of-a-kind Magnolia Family Center — home to backbone partner Children's Bureau and several other network partners. Learn why MCI is receiving national and international attention from the Robert Wood Johnson Foundation, Federal Reserve Bank, the Doris Duke Charitable Foundation, Casey Family Programs, and more.

Joining Forces to Transform a Community

The Home For Good Funders Collaborative is a private-public partnership that, over the past two years, has strategically coordinated more than \$200 million in resources to end chronic and veteran homelessness. The collaborative began with a generous contribution of seed funding from the Conrad N. Hilton Foundation and has used its coordinated resources to fund innovative and impactful permanent supportive housing, services and systems change throughout Los Angeles County. A panel of private foundation and public sector leaders will join United Way of Greater Los Angeles to discuss the development of the collaborative and its continued efforts to incorporate Los Angeles' diverse community of funders, policymakers and service providers in designing sustainable systems to end homelessness. This afternoon's panel will be hosted by a collaborative grantee, A Community of Friends, and a tour of their Villas at Gower housing development in Hollywood.

2:00 – 3:30 P.M. | BREAKOUT SESSIONS ROUND B

💰 B1: Integrating a Nonprofit Capacity-Building Lens into a Grantmaker's Culture

Session Designers: Lee Draper, Draper Consulting Group, and Syla Obagi, Annenberg Foundation

Location: Studio A/B

How do you support or deliver capacity building for your grantees? Is it better to integrate capacity building into a grantmaker's overall culture or is it more effective as a separate program? This highly participatory session will explore how an integrated approach can achieve greater results for organizations and the social sector. Panelists representing small and large foundations will share a wide range of methods for integrating nonprofit capacity building into the fabric of grantmaking, including how to design application guidelines, conduct proposal reviews, make funding decisions, create dynamic relationships with grantees, and develop overall program strategies to strengthen organizations and expand impact. We will also discuss how to overcome challenges that hold back such efforts.

Speakers:

- Leonard Aube, Annenberg Foundation
- Wendy Garen, The Ralph M. Parsons Foundation
- Lindsey Stammerjohn, The John Gogian Family Foundation

💰 B2: Overhead Myth Busters: Advocating to Eliminate Overhead Restrictions

Session Designer: Heather Peeler, GEO

Location: Doheny-Beachwood

As Guidestar, Charity Navigator and BBB Wise Giving Alliance note in their Overhead Myth letter to donors, overhead rates are not an adequate measure of organizational effectiveness when assessing prospective grantees. In fact, limits on overhead end up doing more harm than good and lead grantees to underinvest in their organizations. In communities around the country, grantmakers have been inspired by the growing movement to go beyond overhead. These "myth busters" are changing their policies related to overhead restrictions, speaking out and asking their peers to do the same. If you are ready and willing to take action, influence your peers and colleagues, and overcome barriers to change, then this session is for you. This is your chance to work on an action plan to effect change and get input from other myth busters.

Speakers:

- Jan Masaoka, California Association of Nonprofits
- Heather Peeler, Grantmakers for Effective Organizations

🌐 B3: Effective Engagement Strategies for Small Foundations

Session Designer: Sara Beggs, Association of Small Foundations

Location: Mt. Olympus

Funders are increasingly aware that achieving impact in complex areas requires them to engage beyond their current grantees and traditional funding partners. How can small foundations — with limited staff, money and time — effectively engage a broader range of stakeholders in their work? Two foundations will share their motivation for broader engagement, their particular approaches to engagement and the benefits of following an emergent process. Participants will leave the session understanding key components of successful engagement as well as having a framework to help them think through the steps of what it takes to effectively engage others.

Speakers:

- Hanh Le, Association of Small Foundations
- Sheila Leddy, The Fledgling Fund
- Elizabeth Sak, The Cricket Island Foundation

🌐 B4: Learning from Local Networks: Collaborative Approaches for Community-Focused Grantmakers

Session Designers: Gregg Behr, The Grable Foundation, and Dustin Stiver, The Sprout Fund

Location: Runyon-Laurel

Raze the silos; do more than connect dots; actually move the needle! Grantmakers are positioned to harness and build community movements, connecting unexpected as well as complementary organizations to work together. In this session we will examine the evolution of two networks designed to remake learning for children and youth in and out of school: the Kids+Creativity Network in the Pittsburgh region and the Hive Learning Network, a burgeoning global network with hubs in New York City, Pittsburgh, and Chicago.

Speakers:

- Gregg Behr, The Grable Foundation
- Cathy Lewis Long, The Sprout Fund
- Kerry McCarthy, The New York Community Trust

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- 🌐 NETWORKING

🤝 B5: The Future of California Elections: A Story of Collaborative Impact

Session Designer: Amy Dominguez-Arms, The James Irvine Foundation

Location: Echo Park

In 2011 the Irvine Foundation brought together an unlikely collaboration of election administrators, civil rights organizations and reform advocates to work together on changes in policies and practices that would improve California's electoral system and increase voter participation. Prior to this effort, some of these policy actors had viewed each other as adversaries. Now, under the umbrella of the Future of California Elections, the group has worked together on efforts to achieve same-day voter registration, expansion of the National Voter Registration Act, effective implementation of online voter registration and many improvements to the state voter guide. This session will explore the valuable role that philanthropy can play as the neutral broker in cross-sector coalitions and how to put key collaboration principles into action in political environments.

Speakers:

- Efrain Escobedo, Los Angeles County Registrar of Voters
- Kathay Feng, California Common Cause
- Catherine Hazelton, The James Irvine Foundation

🎯 B6: Embracing Messiness: A Framework and Tools for Evaluating Collective Impact

Session Designers: Fay Hanleybrown and Hallie Preskill, FSG

Location: Studio D/E

Is it possible to evaluate messy systems change processes such as collective impact? We think so, and we are excited to share a fresh approach that helps funders think about how to evaluate collective impact initiatives. Using a case study from a field leader and small-group discussions, you will learn how to apply a new framework for evaluating collective impact efforts at various stages of development. Learn how to effectively track both the progress and the outcomes of collective impact initiatives, and how evaluation can help you adapt along the way. Recognizing that evaluation needs to shift as initiatives mature, this session will offer examples of milestones and ways to measure outcomes at all phases of an initiative's life. We will also touch on common funder questions, including how to manage longer timelines for change and how to use evaluation to promote both accountability and learning.

Speakers:

- Fay Hanleybrown, FSG
- Hallie Preskill, FSG
- Ken Thompson, Bill & Melinda Gates Foundation

🎯 B7: Would Gandhi, Chavez or King Receive a Grant Today? Benefits and Limits of Measuring Philanthropic Impact

Session Designer: Christine Reeves, National Committee for Responsive Philanthropy

Location: Studio C

Imagine Dr. King completing a 17-page grant proposal, or Gandhi and Chavez hosting foundation site visits. What kind of relationship would they have wanted with foundations, and how would they have liked foundations to champion modern leaders? Today, foundations feel pressure to measure and evaluate the impact of their grantees' work. As a result, is philanthropy becoming the new math? Measurement and evaluation are often valuable, but are we sometimes squeezing square pegs into round holes? How can we ensure that evaluation isn't the goal but rather one means of helping grantees and communities thrive? How can we create environments for grantees to give honest feedback and be true partners, without fearing loss of funding? In this session, participants will learn strategies and discuss ideas for thoughtfully approaching evaluation and genuine partnership-building. Participants will also take part in a hands-on activity that they can share with their colleagues back home.

Speakers:

- Rev. Zachary Hoover, LA Voice
- Christine Reeves, National Committee for Responsive Philanthropy
- Edgar Villanueva, Marguerite Casey Foundation



4:00 – 5:30 P.M. | BREAKOUT SESSIONS ROUND C

💰 C1: Nonprofit Capacity Building 3.0: The Next Frontier for Funders

Session Designer: Pete York, Algorhythm

Location: Studio A/B

Over the past three decades, nonprofit capacity building has evolved from piecemeal technical assistance provided primarily by independent consultants to a more mature field largely focused on providing comprehensive, high-quality services. Still, many funders continue to ask how to ensure they are making the wisest investments in building capacity. TCC Group recently conducted a meta-evaluation of about 30 nonprofit capacity-building initiatives to gain further insight into the best ways to provide high-impact and cost-effective support. This session will share highlights from this research and perspectives from foundations that have recently revised their capacity-building strategies. Participants will explore how funders can make investments in capacity building that are better tailored to individual organizations' needs and conduct better organizational assessments that provide more useful information.

Speakers:

- Katie Merrow, New Hampshire Charitable Foundation
- Becky Pastner, St. David's Foundation
- Pete York, Algorhythm

🌀 C2: Design Doing: Increasing Funder Impact through Design Thinking

Session Designer: Zahra Ebrahim, archiTEXT

Location: Runyon-Laurel

Design thinking is getting a lot of attention as a possible new way to find solutions to social-sector problems. This session will immerse participants in the process of design thinking and explore how funders can combine empathy and creativity to address challenges and opportunities for better grantmaking. Participants will walk through the design thinking process of empathy, discovery and ideation, and will culminate in rapid prototyping of new models for finding and funding innovative solutions to complex problems, more effective stakeholder engagement and creating a learning organization. This session is for grantmakers who want a detailed orientation to design thinking and how to bring it to the grantmaking process.

Speakers:

- Zahra Ebrahim, archiTEXT
- Arti Freeman, Ontario Trillium Foundation

🌪️ C3: We Are All Disaster Funders

Session Designer: Debra Jacobs, The Patterson Foundation

Location: Echo Park

Hurricanes, tornadoes, floods, wildfires, earthquakes — nobody is immune. What can you do to help your community prepare for a natural disaster and how will you react when it strikes? Discover practical, actionable steps in this interactive and timely workshop. In the wake of Hurricane Sandy, communities discovered how ill-prepared they were to share the information that the public demanded. In response, in New Jersey, donors and nonprofits collaborated on a unique partnership that offers a model for future disasters, including convenings, facilitated dialogue and engagement tools to help spread accurate information swiftly. Now as the area moves into the long-term recovery phase, where rebuilding decisions will undoubtedly have long-term impacts, it's more critical than ever to get broad public input into the decision-making process. In this session, we will explore the partnership that was funded by The Geraldine R. Dodge Foundation and Community Foundation of New Jersey, The Knight Foundation, The Patterson Foundation and Center for Disaster Philanthropy and how it offers a thought-provoking model for civic engagement in other disaster-affected areas.

Speakers:

- Molly de Aguiar, The Geraldine R. Dodge Foundation
- Debra Jacobs, The Patterson Foundation
- Robert Ottenhoff, Center for Disaster Philanthropy

🕒 C4: Building a Better Mousetrap: Using Field Scans to Enhance Collective Action

Session Designer: Christine E. Sherry, Swanson Family Foundation

Location: Mt. Olympus

As philanthropy continues to embrace partnerships and initiatives that focus on shared impact, it is increasingly important that grantmakers participate in field scans that help analyze what has and hasn't worked in a community, and what is still needed. Knowing where and how others are funding sets the stage for smarter and more effective collaborations, helping to identify common areas of work, promoting partnership and preventing duplication. In this session, participants will hear funders discuss how they have funded and shared field scans to help maximize their shared impact.

Speakers:

- Gary Cunningham, Northwest Area Foundation
- Mary Pickard, GHR Foundation
- Christine E. Sherry, Swanson Family Foundation

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🎯 **C5: Intelligent Failure: Practical Tools for Building a Culture of Learning and Innovation**

Session Designer: Ashley Good, Fail Forward
Location: Studio C

It is rare for new ideas and insights to turn into successful programs on the first try. Even tested approaches don't always go as planned. Failure happens. The question is: How do we fail intelligently? How do we create space for innovation, build resilience, and harness the productive potential of our failures? In this session, participants will explore what intelligent failure means in their context, participate in hands-on, interactive activities and engage and learn with peers to discover easy ways to apply intelligent failure practices that align with organizational needs. Participants will walk away with tangible skills, insights and actions that help them, and their organizations, fail better.

Speakers:

- Bob Giloth, The Annie E. Casey Foundation
- Ashley Good, Fail Forward

🗣️ **C6: Social Media Beyond Vanity Metrics: Leveraging Social Media to Strengthen Foundation Strategy**

Session Designer: Lissan Anfune, GEO
Location: Doheny-Beachwood

An increasing number of grantmakers are using vanity metrics to display their engagement with social media: 14,000 Facebook likes, 3,000 new followers on Twitter. But what do these numbers really mean and how can foundations leverage social media to strengthen their strategies and communications? In this session participants will hear from grantmakers who are integrating social media into all aspects of their work, from strengthening relationships with grantees and partners to increasing public awareness of key issue areas. Participants will have the opportunity to discuss best practices and how to navigate the increasingly complex social media landscape to find the tools and strategies that work best for them.

Speakers:

- Danielle M. Reyes, The Eugene and Agnes E. Meyer Foundation
- Eric Schoenborn, John S. and James L. Knight Foundation

💰 **C7: Ingredients for Impact: Foundations Building Nonprofit Capacity and Real Results**

Session Designer: Christine Reeves, National Committee for Responsive Philanthropy
Location: Studio D/E

Not all grants are created equal. It may not be a popular idea, but deep down, we all know it's true. Some approaches to philanthropy have been proven to build nonprofit capacity and leverage limited foundation dollars to achieve sustainable, lasting and real results that benefit underserved or marginalized communities. In this highly interactive session, there are no prepared speeches. Repeat, no prepared speeches! Instead, attendees receive a menu of proven philanthropic strategies and then vote on which ones they want the speakers to explore. In response, the expert speakers will ensure a rich, honest, and multi-sided discussion about the strategies that get the most votes. The session will close with a small-group discussion and a fun homework assignment, which will help participants brainstorm their foundations' biggest successes and challenges as well as how to take action in the short-term and long-term.

Speakers:

- Aaron Dorfman, National Committee for Responsive Philanthropy
- Daniel Lee, Levi Strauss Foundation
- Christina Livingston, Alliance of Californians for Community Empowerment

6:00 – 8:00 P.M. | DINE AROUNDS 🌐

Location: Off-site

Join a group of your colleagues for dinner, informal conversation and culinary delights. The only cost to you is the price of your dinner, at a reasonably priced restaurant located within walking distance or a short cab ride from the hotel. Interested in participating in or hosting a dine around? You can view location options and sign up to join or host a group in the registration area. Diners should meet in the lobby area for a departure time of 6:00 p.m.

7:30 – 8:30 A.M. | NETWORKING BREAKFAST ☕

Location: The Ray Dolby Ballroom

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

8:30 – 10:00 A.M. | BREAKOUT SESSIONS ROUND D

💰 D1: Lessons Learned in Investing in Leadership

Session Designer: Kevin Rafter, The James Irvine Foundation

Location: Studio A/B

We all know strong leadership is important. But many people question whether investing in leadership development makes a difference in the work itself. Does it help leaders get better results for their organizations or is it a luxury? For the past eight years, The James Irvine Foundation and the Evelyn & Walter Haas, Jr. Fund have both invested significant resources in targeted leadership development for more than 100 grantees. Each funder has learned a lot along the way and refined its approach based on grantee feedback, multiple evaluations and insights from the field. The two foundations will share the results of their evaluations and what they're learning about key principles for successful funder investment in strong leadership. Participants will have an opportunity to hear grantee perspectives on the value and challenges of receiving this support, and in small-group settings, participants will share their experience and questions about investing in leadership and how to connect the dots to organizational impact.

Speakers:

- Carol Gelatt, The James Irvine Foundation
- Paula Morris, Evelyn & Walter Haas, Jr. Fund
- Kevin Rafter, The James Irvine Foundation

🌐 D2: Net Work, Net Equity and Emergence: Getting It Right from the Start

Session Designer: Curtis Ogden, Interaction Institute for Social Change

Location: Mt. Olympus

Collective impact and networks have caught the attention and fired the imagination of the social sectors, and many grantmakers are discovering that there is great potential and challenge in embracing complex multistakeholder approaches to social change. In this session, speakers will share the story, key insights and tools from the past two years of Right From the Start, an early childhood system-building effort in Connecticut that focuses on local community engagement and racial and economic equity. What began with a strong emphasis on action became a deep learning process around systems thinking, structural racism and network approaches to transformation. Participants will be invited to share their experiences and explore some of the concepts and frameworks RFTS has used to this point to advance its collective learning and action agenda.

Speakers:

- Nancy Leonard, William Caspar Graustein Memorial Fund
- Magalis Martinez, The Color of Words
- Curtis Ogden, Interaction Institute for Social Change

💰 D3: The Power of Partnership: Networked Approaches to Supporting Nonprofit Capacity and Leadership

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

Location: Studio C

In 2012 and 2013, GEO held conversations with funders and nonprofit leaders across the country to explore current challenges and opportunities in building nonprofit capacity. Many funders are finding value in networked approaches — working with cohorts of grantees so that leaders can share knowledge, learn from their peers and grow their networks. In this session learn how two foundations have worked collaboratively with grantees to build networks focused on capacity building and leadership. We'll engage in action learning during the session, to grapple with questions like these: What are the pros and cons of working with groups of grantees to build capacity, versus focusing on one organization at a time? How can you tell if you and your grantees are ready to function as a network? How can you keep a capacity-building and leadership network focused and productive? How can you measure success?

Speakers:

- Kathy Reich, The David and Lucile Packard Foundation
- Joann Ricci, Greater New Orleans Foundation
- Kaki Rusmore, Community Foundation for Monterey County

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- 🌐 NETWORKING



🗣️ D4: Embedding Learning and Evaluation in the Grantmaking Cycle

Session Designer: Marilyn Darling, Fourth Quadrant Partners
Location: Runyon-Laurel

Grantmakers talk a lot about their expectations that grantees should learn together, but if we rated ourselves honestly on our own ability to learn, what score would we give ourselves? Are we using grant reports to make better grant decisions? Are we willing to reflect honestly on disappointing results? Is the learning we are asking our grantees to do with us actually useful to them? Are we learning rigorously across our grants? In this session, participants will have an opportunity to rate their own learning practices and share good practices they have developed. Speakers from Ford Foundation's Metropolitan Opportunity Unit and The Colorado Health Foundation will discuss the practical steps they are taking and the challenges they face as they strive to embed learning into the grantmaking cycle, better link evaluation and real-time learning, and strengthen learning from and with grantees. Participants will engage in a discussion on best practices, challenges and how they can embed learning into their grantmaking cycle.

Speakers:

- Marilyn Darling, Fourth Quadrant Partners
- Amy Kenyon, Ford Foundation
- Kelci Price, The Colorado Health Foundation

🗣️ D5: The youthCONNECT Initiative — Developing and Implementing the Common Outcomes Framework, a Shared Measurement Approach

Session Designer: Ayo Atterberry, Venture Philanthropy Partners
Location: Doheny-Beachwood

With an increased focus on collaboration, many in philanthropy continue to search for ways to measure impact across organizations. YouthCONNECT, a partnership of Venture Philanthropy Partners and six high-performing nonprofits, has implemented a shared measurement approach, working together to develop a common outcomes framework with indicators that are used across all partner organizations. This session will explore youthCONNECT's experience with its shared measurement approach, including the challenges, process of adoption, and how others can adapt and develop similar frameworks for their collaborative efforts.

Speakers:

- Ayo Atterberry, Venture Philanthropy Partners
- Zakia Redd, Child Trends
- Kevin Trimell Jones, Metro TeenAIDS

🤝 D6: From Concept to Community Groundswell: Communications Builds Support for Grade-Level Reading

Session Designer: Debra Jacobs, The Patterson Foundation
Location: Echo Park

Every child deserves to be reading on grade level by the end of third grade — but it takes a community to make it happen. As networks of individuals and groups become the new normal for getting work done, it is necessary for grantmakers to understand the challenges, complexity and opportunities inherent in leveraging networks to drive broad, systemic change. In this session, we will explore the formation and implementation of an existing network, the Campaign for Grade-Level Reading that includes over 150 communities across the country focused on children reading on grade level by third grade, and key lessons around intentional design and strategic communications. By combining technology with insightful human action, philanthropy can help unleash the power of community engagement to leverage networks to increase impact.

Speakers:

- Roxanne Joffe, MagnifyGood on behalf of The Patterson Foundation
- Jennifer Torres Siders, University of the Pacific
- Ralph Smith, The Campaign for Grade-Level Reading

👥 D7: Working Well with Grantees: Recommendations for Foundation Program Staff

Session Designer: Ellie Buteau, The Center for Effective Philanthropy
Location: Studio D/E

Grantees' perceptions of foundations are powerfully affected by their relationships with foundation staff. They perceive foundations as making more of an impact on their organizations, communities and fields when they feel these relationships are strong. Those who work as program officers at foundations are integral to the experiences that grantees have with foundations. Indeed, to the grantee, the program officer often is the foundation. This session will share research and findings from a recent CEP report on how program staff can build better working relationships with grantees. Program officers who have been rated highly by their grantees will provide insights on how they build strong relationships. Participants will explore strategies they can apply to their own interactions with grantees.

Speakers:

- Phil Buchanan, The Center for Effective Philanthropy
- Ken Doane, S.H. Cowell Foundation
- Justin D. Laing, The Heinz Endowments

10:30 A.M. – 12:00 P.M. | BREAKOUT SESSIONS ROUND E AND ENCORE SESSIONS

E1: Working with Residents to Strengthen Communities: What It Takes

Session Designers: Nick Deychakiwsky, Charles Stewart Mott Foundation, and Caroline Merenda, CFLeads

Location: Studio A/B

Resident engagement is a critical component of the work of place-based funders. In this session, participants will learn what effective resident engagement looks like in two communities and why it matters. They will also participate in small-group conversations about how to develop their organizations' culture, relationships, resources and skills in this area. Speakers will use the Framework for Community Leadership, created by the CFLeads Community Engagement Panel, to guide the conversations.

Speakers:

- Roque Barros, formerly of Jacobs Family Foundation
- Lauren Casteel, The Denver Foundation
- Deborah Ellwood, CFLeads

E2: Cracking the Network Code: Four Principles for Grantmakers

Session Designer: Jane Wei-Skillern, UC Berkeley Haas School of Business

Location: Echo Park

The principles that foster strong and effective networks are dramatically different from common practice and norms of operation in the philanthropic sector. Yet these soft skills are the "secret sauce" that differentiates mediocre collaborations from those that achieve transformational change. Drawing on the recent GEO publication *Cracking the Network Code: Four Principles for Grantmakers*, this session will leverage the experiences of seasoned network leaders to present four key foundational values that underlie collaboration success: focus on mission before organization; manage through trust, not control; promote others, not just yourself; and build constellations, not stars. Participants will delve into these principles and explore how they can apply them in their own work.

Speakers:

- Marty Kooistra, Housing Development Consortium of Seattle-King County
- David Nee, William Caspar Graustein Memorial Fund
- Jane Wei-Skillern, UC Berkeley Haas School of Business

E3: A Road Map for Evaluating Comprehensive Community Grantmaking

Session Designers: Jessica Bearman, Bearman Consulting, and Leonor Alfonso, GEO

Location: Studio C

When grantmakers fund complex place-based or community change initiatives, it can be difficult to figure out exactly what is important and how to measure it. But since what gets measured is often what gets done, we have to get this right! A strong framework for planning and measuring place-based initiatives can help grantmakers collect appropriate data and figure out what needs to be in place for long-term, sustainable community change. GEO's Embrace Complexity community of practice on evaluating place-based grantmaking has been wrestling with these questions and has proposed a framework for evaluating multifaceted community-change grantmaking initiatives. Session participants will hear from grantmakers about how this framework guides their initiative planning and evaluation, and will explore how it applies to their own work.

Speakers:

- Tom Kelly, Hawai'i Community Foundation
- Lori Nascimento, The California Endowment
- Justin Piff, OMG Center for Collaborative Learning

E4: It Takes Two to Tango: Nonprofit Capacity through Mergers and Other Partnerships

Session Designer: Lynn Alvarez, Nonprofit Sustainability Initiative

Location: Studio D/E

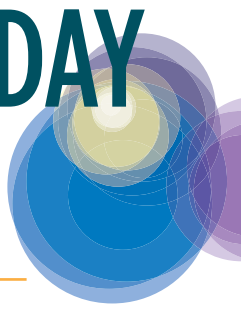
The Nonprofit Sustainability Initiative is a collaboration among a diverse group of funders to support nonprofits in Los Angeles interested in exploring and pursuing partnerships ranging from jointly managed programs and consolidated administrative functions to full-scale mergers. Through the use of an interactive, case-study approach, participants will explore the benefits and challenges for nonprofits engaging in mergers and other forms of strategic restructuring, and what grantmakers should and should not do in facilitating such activities.

Speakers:

- Fred Ali, Weingart Foundation
- Varina Bleil, Inside Out Community Arts
- Patricia Costales, The Guidance Center
- David Pilon, Mental Health America of Los Angeles
- Amy Shapiro, P.S. Arts

- 🤝 COLLABORATIVE PROBLEM SOLVING
- 🗣️ EVALUATION AND LEARNING
- 💰 CAPACITY BUILDING AND FINANCIAL SUSTAINABILITY
- 👥 STAKEHOLDER ENGAGEMENT
- 🌐 NETWORKING

MARCH 12 WEDNESDAY



ENCORE SESSIONS

Too many breakout sessions and speakers to choose from? Miss a topic of interest related to your work? Vote for up to three of the following breakout sessions from rounds A, B and C, and the three sessions with the most votes will be repeated during round E.

- 💰 **A1: Funding for Success: The Cost of Achieving Outcomes**
- 👥 **A3: Actions Speak Louder Than Words: Considering the Connection between Values and Practice**
- 🤝 **A7: Technology Tools for Funder Collaboration**
- 🤝 **A8: How Can Funders Build the Capacity and Leadership of Movements?**
- 👥 **B3: Effective Engagement Strategies for Small Foundations**
- 🤝 **B4: Learning from Local Networks: Collaborative Approaches for Community-Focused Grantmakers**
- 🤝 **B5: The Future of California Elections: A Story of Collaborative Impact**
- 🗣️ **B6: Embracing Messiness: A Framework and Tools for Evaluating Collective Impact**
- 🗣️ **B7: Would Gandhi, Chavez or King Receive a Grant Today? Benefits and Limits of Measuring Philanthropic Impact**
- 👥 **C2: Design Doing: Increasing Funder Impact through Design Thinking**
- 🤝 **C3: We Are All Disaster Funders**
- 🤝 **C4: Building a Better Mousetrap: Using Field Scans to Enhance Collective Action**
- 🗣️ **C5: Intelligent Failure: Practical Tools for Building a Culture of Learning and Innovation**
- 💰 **C7: Ingredients for Impact: Foundations Building Nonprofit Capacity and Real Results**

Voting opens on March 10 at 4:00 p.m. and ends on March 11 at 6:00 p.m. Use the conference app to submit your vote by clicking "Live Input" on the second page. Or, vote by placing the stickers found inside your name badge on the voting board near the registration desk. We will announce the results — selected sessions and room assignments — during breakfast on March 12.

- E5: Encore 1 — Determined by your vote**
Location: (Mt. Olympus)
- E6: Encore 2 — Determined by your vote**
Location: (Doheny-Beachwood)
- E7: Encore 3 — Determined by your vote**
Location: (Runyon-Laurel)

12:15 – 2:00 P.M. | CLOSING PLENARY LUNCHEON

Location: The Ray Dolby Ballroom

Giving Smarter? Exploring New Philanthropic Models and Their Impact

As the next generation of philanthropists comes of age, new models for philanthropic giving are emerging and gaining traction in the United States, and institutional philanthropy represents a smaller share of overall giving. The people behind these new models are reimagining the process for philanthropic giving, shifting the relationship between donors and communities, and redefining impact. What does the current philanthropic landscape look like, how are these new models approaching questions of nonprofit effectiveness and relationships, and in what ways are they benefiting nonprofits and communities? This session will explore how philanthropic giving has evolved over the past 20 or so years, highlight some models that are gaining in popularity and explore what institutional philanthropy can learn from their strategies to build awareness, deploy resources and achieve results.

Introductory Remarks:



Gregg Behr,
The Grable Foundation

Speakers:



Judy Belk,
Rockefeller Philanthropy Advisors



Maz Kessler,
Catapult



Kim Loughton,
Schwab Charitable Fund



Premal Shah,
Kiva

Closing Remarks:



Kathleen Enright,
Grantmakers for Effective Organizations

LESSONS FROM THE PAST RELATIONSHIPS IN THE PRESENT INSPIRATION FOR THE FUTURE

COMMIT TO STAYING CONNECTED WITH THE GEO COMMUNITY OF GRANTMAKERS

Charles Duhigg's plenary session encouraged us to be better grantmakers by building new habits. Through GEO's website, it's simpler than ever to access resources, peer connections and new tools to help you with a new habit you may have learned at the conference.

As part of our commitment to continuously improve the services we provide to our members, we're proud to introduce our redesigned website to you at this conference. While you're here, we'll have the site on display in the GEO Member Lounge (Suite 329), where you can browse it, sign up for a member access account and let us know your thoughts.

The site's improvements are based on helpful feedback from GEO members, making it more useful and intuitive — allowing you to easily connect with the people and resources that will help you to be a more effective partner to your grantees. New and updated features on the site include:

- More Opportunities to Network with Members**
 Find peers from within the GEO community that share your interest in organizational effectiveness, are from your area or have experience in a similar role.
- Improved Resource Library**
 Search through GEO's library of hundreds of practical resources on organizational effectiveness, specifically tailored to meet your needs.
- New Selection of Member Stories**
 Learn about the experiences of your colleagues as they pursue positive change in their communities and explore what is working.
- The Smarter Grantmaking Playbook**
 Find responses to some common questions about effective grantmaking that we hear from members. We'll be updating the questions and responses throughout the year, so keep checking back.

VISIT THE SITE NOW AT
WWW.GEOFUNDERS.ORG



GEO PUBLICATIONS ORDER FORM

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

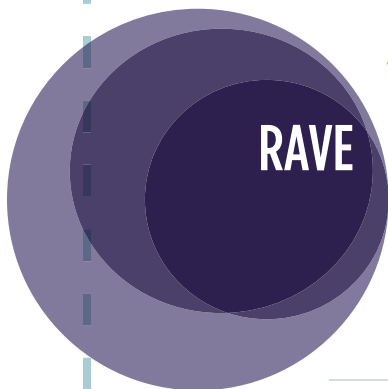
Please indicate how many copies of some of GEO's print publications you would like to order:

- Many Hands, More Impact: Philanthropy's Role in Supporting Movements*
- Cracking the Network Code: Four Principles for Grantmakers*
- Pathways to Grow Impact: Philanthropy's Role in the Journey*
- Learn and Let Learn: Supporting Learning Communities for Innovation and Impact*
- Four Essentials for Evaluation*
- Is Grantmaking Getting Smarter? A National Study of Philanthropic Practice*
- Catalyzing Networks for Social Change*
- Widespread Empathy: Five Steps to Achieving Greater Impact in Philanthropy*
- Do Nothing About Me Without Me: An Action Guide for Engaging Stakeholders*
- Coaching and Philanthropy: An Action Guide for Grantmakers*
- Evaluation in Philanthropy: Perspectives from the Field*
- Assessing the Impact: General Operating Support*

Stay connected with what other grantmakers are finding to be the most effective ways to help increase the impact of their grantees, and be part of the pursuit of smarter grantmaking. Head over to www.geofunders.org to access these digital publications, plus other useful resources that have come from the GEO community.

- *Working Better Together: Building Nonprofit Collaborative Capacity*
- *Smarter Relationships, Better Results: Making the Most of Grantmakers' Work with Intermediaries*
- *Building Community Capacity for Participation in Evaluation: Why It Matters and What Works*
- *Great Power, Great Responsibility: Grantmakers' Role as Conveners*
- *Investing for Impact: Building the Capacity and Infrastructure of High-Performing Nonprofits*
- *The Promise and Pitfalls of Local and National Funder Collaborations*

continued on back >



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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GEO members receive print copies of all GEO publications in the mail as soon as they are available and can order up to 15 more complimentary copies. Nonmembers may purchase print copies of publications for \$12 each, plus shipping costs. Contact Evan Trowbridge, at 202.898.0317 or trowbridge@geofunders.org, with any questions.

You can access digital copies of these and all other GEO publications through our **online Resource Library, located at www.geofunders.org**.



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.

FLOOR PLAN

THE RAY DOLBY BALLROOM



Plenary sessions, meal functions, and discussion groups

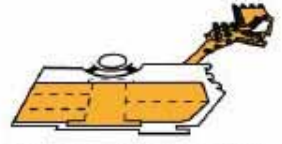


5TH LEVEL

THE ANNEX

Welcome Reception

5TH LEVEL



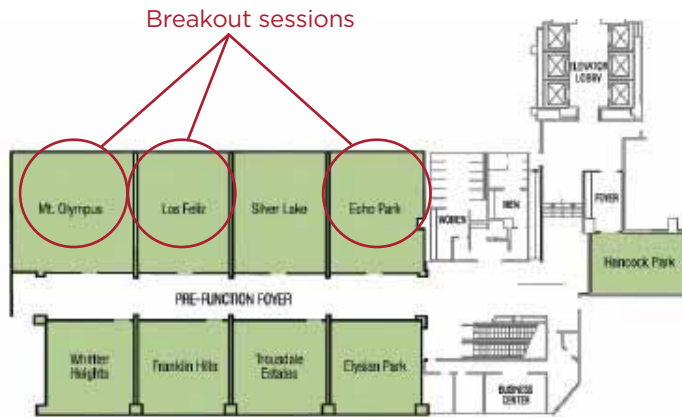
3RD LEVEL



MEZZANINE LEVEL

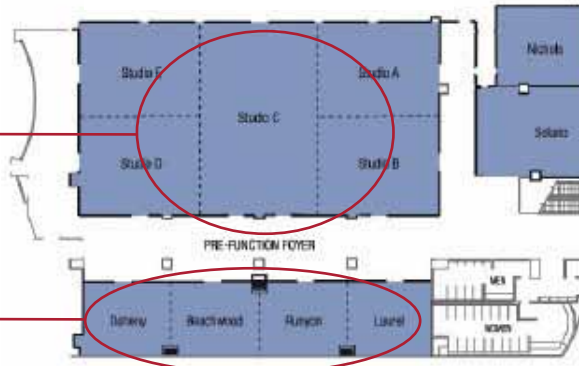
Orientation

3RD LEVEL



Breakout sessions

HOLLYWOOD BALLROOM



Short talks and breakout sessions

Breakout sessions

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MEZZANINE LEVEL

To Grand Ballroom and Retail

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