

Grantmakers for  
Effective Organizations  
*presents*

HYATT REGENCY  
**BOSTON**  
**JUNE 10-11**

Held in partnership with  
Associated Grant Makers

#GEOLearn  
[bit.ly/geolearn](http://bit.ly/geolearn)



# 2015 THE LEARNING CONFERENCE

CONFERENCE PROGRAM



## About GEO

GEO is a diverse community of more than 500 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. The GEO community provides grantmakers with the resources and connections to build knowledge and improve practice 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 a host of resources and links for grantmakers are available at [www.geofunders.org](http://www.geofunders.org).

## Our Partner

Associated Grant Makers is a diverse and vibrant membership association of highly engaged philanthropic organizations and individuals with interests in Massachusetts and surrounding areas. AGM connects donors, their trustees and their staff to each other, to their communities and to emerging and relevant issues in the field. Serving as a bridge between funders and fund applicants for better understanding and efficiency, AGM is a leading voice for effective philanthropy. AGM provides the leadership and access to knowledge and cooperative action that enable its members to create extraordinary value for each other and their grantees and to collectively shape the future of a healthy and vibrant region. Visit [www.agmconnect.org](http://www.agmconnect.org).

### GEO BOARD OF DIRECTORS

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

### CONFERENCE PLANNING COMMITTEE

- **Danielle Breslin**  
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## 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. Participants who are new to GEO are making the most of the conference by tapping the knowledge of seasoned GEO conference veterans. If you're new to GEO or to this conference and have questions, feel free to ask anyone whose name tag has an Ambassador label — they are happy to help!

## GEO's Conferences Are Paper-Lite

As part of our conference sustainability plan, GEO does not provide printed copies of session handouts or presentations, speaker bios or the participant roster. GEO will make session resources available electronically for download through our website at [bit.ly/geolearn](http://bit.ly/geolearn) and our conference app.

**T**oday you join 300 grantmakers from the GEO community and around the country to leverage our field's knowledge of and experience in evaluation practices so that we might design learning approaches that are more inclusive of our grantees, colleagues, partners and the communities we serve.

On behalf of the GEO staff, the conference planning committee, our sponsors, and our local regional partner, Associated Grant Makers, we welcome you to Boston. We are excited to gather with you for two days packed with stimulating ideas, practical tools and opportunities to connect with and learn from your peers. Though there is no one-size-fits-all approach to learning and evaluation, we know there are certain practices that can amplify the effectiveness and impact of our work. This conference focuses on one such practice: How learning with others can help us ask the right questions, gain a deeper understanding of our work and benefit from the insights of a broader group of partners.

You're attending this conference because you understand the importance of sharing what we learn, both successes and failures. During the plenaries, short talks and breakouts over the next two days, your peers will explore approaches to learning together, including engaging stakeholders, boosting grantee capacity for learning, embracing transparency and failure, and building internal capacity to sustain learning and apply what is learned. We're especially excited that our Fail Fest is back by popular demand — you'll have the opportunity on Wednesday to hear from five grantmakers who are willing to share candid stories of failure and hard lessons learned.

As you look to your own evaluation approaches in the coming days, weeks and months, we hope this event will leave you with new understanding of your work, new ideas to implement and new relationships you can call on for support.



A handwritten signature in black ink that reads "Kathleen P. Enright".

Kathleen P. Enright

*President and CEO*

*Grantmakers for Effective Organizations*



A handwritten signature in black ink that reads "Danielle Breslin".

Danielle Breslin

*Vice President*

*Blue Cross and Blue Shield of North Carolina Foundation*

*Conference Planning Committee Chair*



### Session Resources. Participant Roster. Speaker Bios.

It's all online. Just visit [bit.ly/geolearn](http://bit.ly/geolearn) or download our [conference app](#).



#### Twitter

**#GEOLearn** 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.



#### 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 open only to GEO members, it's also a great environment for giving input, seeking advice from your peers and sharing job postings, and GEO staff regularly post resources, learning opportunities and more.



#### Network with Members

A great resource for grantmaker collaboration, our Network with Members online tool allows GEO members to connect with each other by searching a database of grantmakers based on geographic location, role, grantmaking interests, organization and last name.

Visit [www.geofunders.org/network-with-members](http://www.geofunders.org/network-with-members) to use this feature and to join the ranks of those leading the charge for more effective grantmaking.



#### 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).



#### 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 publications and upcoming events.

# WEDNESDAY, JUNE 10

Registration is open from 7:30 a.m. to 5:30 p.m. in the Fourth Floor Foyer

<p><b>8:00 – 9:00 a.m.</b></p> <p><b>9:00 – 10:30 a.m.</b></p> <p><b>10:30 – 11:00 a.m.</b></p>	<p><b>Continental Breakfast</b> • <i>Grand Ballroom</i></p> <p><b>Opening Session:</b> Set Your Learning in Motion • <i>Grand Ballroom</i></p> <p><b>Break</b></p>
<p><b>11:00 a.m. – 12:15 p.m.</b></p>	<p><b>Breakout Sessions Round A</b> (Select one of six options)</p> <p><b>A1.</b> Put Yourself in Someone Else’s Shoes: Partnering for Success • <i>Adrienne Salon</i></p> <p><b>A2.</b> The State of Network Evaluation • <i>Duxbury</i></p> <p><b>A3.</b> Prioritizing Equity in Learning, Inside and Out • <i>Martha’s Vineyard A</i></p> <p><b>A4.</b> Using Participatory Evaluation to Advance Neighborhood Change • <i>Dedham</i></p> <p><b>A5.</b> A Partnership Model: Co-designing Evaluation with Grantees • <i>Martha’s Vineyard B</i></p> <p><b>A6.</b> Blur the Lines, Sharpen Your Work • <i>Cape Cod</i></p>
<p><b>12:30 – 2:30 p.m.</b></p> <p><b>2:30 – 3:00 p.m.</b></p>	<p><b>Plenary Luncheon:</b> Coming Together and Getting It Together • <i>Grand Ballroom</i></p> <p><b>Break</b></p>
<p><b>3:00 – 4:15 p.m.</b></p>	<p><b>Breakout Sessions Round B</b> (Select one of six options)</p> <p><b>B1.</b> Live with Performance Measurement Mavens! A Journey toward Organizational Transformation • <i>Cape Cod</i></p> <p><b>B2.</b> Designing, Piloting and Evaluating Major Shifts in Grantmaking Strategy • <i>Duxbury</i></p> <p><b>B3.</b> Learning with Diverse Communities through Culturally Responsive Evaluation • <i>Martha’s Vineyard A</i></p> <p><b>B4.</b> Co-creating Knowledge with Social Justice Grantees • <i>Martha’s Vineyard B</i></p> <p><b>B5.</b> Building the Data-use Capacity of Multisector Grantees • <i>Adrienne Salon</i></p> <p><b>B6.</b> Growing Your Organization’s Ability to Open Source Social Change • <i>Dedham</i></p>
<p><b>4:30 – 5:15 p.m.</b></p> <p><b>5:00 – 7:00 p.m.</b></p> <p><b>7:00 – 9:00 p.m.</b></p>	<p><b>Active Hour</b> (optional)</p> <p><b>Fail Fest and Evening Reception</b> • <i>Grand Ballroom &amp; Grand Ballroom Terrace</i></p> <p><b>Dine Arouds</b> (optional) • <i>Off-site (Meet in the hotel lobby for a 6:45 p.m. departure)</i></p>

# THURSDAY, JUNE 11

Registration is open from 6:00 a.m. to 2:30 p.m. in the Fourth Floor Foyer

**6:30 – 7:30 a.m.** **Active Hour** (optional)  
**8:00 – 9:00 a.m.** **Networking Breakfast** • *Grand Ballroom*

**9:30 – 11:15 a.m.** **Short Talks** (Select one in each round)

## GEO MEMBER LOUNGE

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

Find your peers in the Member Lounge located in Lexington. The Member Lounge is open:

WEDNESDAY  
7:30 a.m. – 5:00 p.m.

THURSDAY  
7:30 a.m. – 12:30 p.m.

### Short Talks Round 1 (9:30 – 9:55 a.m.)

1. The Fundamental Flaw of the Social Sector • *Andrew Means, The Impact Lab* • *Martha's Vineyard*
2. What's Your Agenda? • *Tiffany Cooper Gueye, BELL* • *Cape Cod*

### Short Talks Round 2 (10:10 – 10:35 a.m.)

3. Making Failure Count: Metrics That Matter, Metrics That Don't • *Eric Shih, Groundswell* • *Martha's Vineyard*
4. Presenting Data Effectively • *Stephanie Evergreen, Evergreen Data* • *Cape Cod*

### Short Talks Round 3 (10:50 – 11:15 a.m.)

5. 30 Years of Mistakes, Misfits and Magic • *Rajasvini Bhansali, IDEX* • *Martha's Vineyard*
6. Learning Together by Deciding Together: Participatory Budgeting and the Impacts of Engagement • *Josh Lerner, Participatory Budgeting Project* • *Cape Cod*

**11:30 a.m. – 12:15 p.m.** **Moderated Conversations with Short Talk Speakers**

- C1.** Andrew Means, The Impact Lab • *Plymouth*
- C2.** Tiffany Cooper Gueye, BELL • *Dedham*
- C3.** Eric Shih, Groundswell • *Duxbury*
- C4.** Stephanie Evergreen, Evergreen Data • *Adrienne Salon*
- C5.** Rajasvini Bhansali, IDEX • *Martha's Vineyard*
- C6.** Josh Lerner, Participatory Budgeting Project • *Cape Cod*

**12:30 – 2:00 p.m.** **Closing Plenary Luncheon:** Learning Together to Build Community Knowledge and a Public Voice • *Grand Ballroom*

**2:30 – 5:00 p.m.** **W1. Post-Conference Workshop:** System Mapping Made Simple(r) • *Duxbury* (Advance registration required)

# WEDNESDAY JUNE 10

8:00 – 9:00 a.m.

CONTINENTAL BREAKFAST

*Grand Ballroom*

9:00 – 10:30 a.m.

OPENING SESSION

## Set Your Learning in Motion

*Grand Ballroom (Fourth Floor Level)*

To open the conference in a high-energy way, join fellow participants as you warm up your creative and community-building muscles with a design circuit! The session will have participants starting the day doing rapid brainstorming, illustrating and networking focused on the theme of “learning together” and the topics to be explored throughout the conference. Come ready to talk openly with peers about how to create environments that support sharing and learning, as well as the obstacles grantmakers face. Head into the rest of the conference having made connections with colleagues who share similar interests and goals. The co-creative (but low-intensity and accessible) circuit exercises will demonstrate the importance of learning with others to generate ideas, uncover insights and build relationships that support better results. You won’t break a sweat but you just might have a breakthrough!



*Speakers:*

*Zahra Ebrahim,  
archiTEXT*



*Sherry Lin,  
archiTEXT*



A1

## Put Yourself in Someone Else's Shoes: Partnering for Success

*Adrienne Salon (Fourth Floor Level)*

*Session designers: Nora Ferrell and Lori Fuller, Kate B. Reynolds Charitable Trust*

Grantmakers are using more complex, long-term approaches to effect change. Many of these involve multiple partners, each coming to the table with different perspectives, roles and responsibilities. Even when organizations share a long-term vision, bridging different organizational structures, ideas and preconceived notions can be tricky. While contributors often understand their own place in the work, they have difficulty grasping the needs and realities of others around the table. During this role-play session, you will have the chance to try on a hat and perspective different from your own, working in a small group through a real-life, place-based social change scenario. Standing in someone else's shoes, participants will collaboratively define success with partners, identify what it takes to develop agreements and learn together, and discuss the blind spots we bring to collective work.

*Speakers:*

*Lori Fuller, Kate B. Reynolds Charitable Trust*

*Karen McNeil-Miller, Kate B. Reynolds Charitable Trust*

*Allen Smart, Kate B. Reynolds Charitable Trust*

A2

## The State of Network Evaluation

*Duxbury (Fourth Floor Level)*

*Session designer: Madeleine Taylor, Network Impact*

Changemakers everywhere are investing in and building networks — from large-scale, cross-sector collective impact initiatives to more targeted efforts to promote policy change or improve the delivery of services. All of this activity has made evaluation of networks a priority for funders and others who want to learn more about what networks can help achieve and how to build them most effectively. As a result, the field of network assessment is coming into its own and can be a powerful tool for putting network members at the center of tracking their progress to inform future strategy. Moderated by an evaluation practitioner, this session will present recent trends and lessons learned by grantmakers in supporting network evaluation. Participants will learn the fundamentals of designing and funding network assessments and explore the implications of these findings for their own work.

*Speakers:*

*Kimberly Haskins, Barr Foundation*

*Kimberly James, W.K. Kellogg Foundation*

*Madeleine Taylor, Network Impact*

## A3 Prioritizing Equity in Learning, Inside and Out

*Martha's Vineyard A (Main Lobby Level)*

*Session designers: Carrie Boron and Deloris Vaughn, Everyday Democracy, a project of The Paul J. Aicher Foundation, and Angela Frusciante, William Caspar Graustein Memorial Fund*

Issues of diversity and equity are at the root of many of philanthropy's learning and evaluation challenges and are embedded in questions such as these: Who defines and assesses what positive change looks like? How does learning happen among multicultural staff? Where can privilege hide in learning processes? How do we design meaningful learning? As grantmakers, we need to prevent privilege and power structures from impeding effective programs, knowledge sharing and nonprofit results. In this session, participants will discuss how learning and equity move inside and outside of foundations, and how you can embed equity and learning into philanthropic practice. As you explore different learning scenarios that raise key questions about equity, hear from two foundations that have developed more engaging and inclusive learning and evaluation agendas about their own experiences and struggles.

*Speakers:*

*Carrie Boron, Everyday Democracy, a project of The Paul J. Aicher Foundation*

*Angela Frusciante, William Caspar Graustein Memorial Fund*

*Deloris Vaughn, Everyday Democracy, a project of The Paul J. Aicher Foundation*

## A4 Using Participatory Evaluation to Advance Neighborhood Change

*Dedham (Fourth Floor Level)*

*Session designers: Lois Greco, Wells Fargo Regional Foundation, and Maggie Grieve, Success Measures, NeighborWorks America*

Do your grantees thank you for the evaluation requirements placed upon them and tell you how useful the experience has been? If not, come learn about peer cohorts, resident-driven neighborhood plans and other participatory learning efforts developed by the Wells Fargo Regional Foundation and Success Measures at NeighborWorks America. Through 10 years of refinements, the Neighborhood Grants Program, which prioritizes grantee learning, has helped each place-based grantee tailor and implement a common evaluation plan and more effectively interpret and use data over time. Hear firsthand from a grantee about how this method of evaluation changed its ability to design and refine projects, use data to tell its story and increase transparency among stakeholders. Funders will share how consistent evaluation among cohorts of grantees has enhanced their and the field's understanding of impact. Participants will leave with an increased understanding of the challenges and benefits of applying a participatory evaluation approach within their own grant portfolios.

*Speakers:*

*Lois Greco, Wells Fargo Regional Foundation and Community Development Corporation*

*Maggie Grieve, Success Measures, NeighborWorks America*

*Meishka Mitchell, Cooper's Ferry Partnership*

## A5 A Partnership Model: Co-designing Evaluation with Grantees

*Martha's Vineyard B (Main Lobby Level)*

*Session designer: Susan G. Zepeda, Foundation for a Healthy Kentucky*

The grantee playing field is not level. Nonprofits have vastly different degrees of experience with grantwriting, grants management and program evaluation. These differences make it difficult for small organizations and under-resourced communities to compete for grant opportunities and to make decisions that improve their work. During this session, speakers will share their experiences working to reduce access disparities for grantseekers by transforming evaluation rigor from a hurdle for grantees to something co-designed, more respectful and mutually beneficial. Through a series of small-group conversations, participants will discuss how and when to use collaborative evaluation approaches for a variety of grant types and contexts, such as using planning years in multiyear grants and co-developing evaluation reporting forms. Participants will leave the session with a solid understanding of existing barriers to meaningful and participatory evaluation and tools to overcome these barriers, along with examples of how these tools are applied by foundations.

*Speakers:*

*Madeleine Frey, Healthcare Georgia Foundation*

*Maggie Jones, Center for Community Health and Evaluation*

*Susan G. Zepeda, Foundation for a Healthy Kentucky*

## A6 Blur the Lines, Sharpen Your Work

*Cape Cod (Main Lobby Level)*

*Session designer: Jessica Bearman, Bearman Consulting*

Good grantmaking practices lead to better grantmaking impact. Yet funders often treat grantmaking operations or implementation as completely separate from program strategy. Grantmakers have an incredible opportunity to learn and strengthen their work by bringing together the two sides of their “brain” — grantmaking programs and grantmaking operations. By paying attention to how their systems and practices support or undermine their strategy, funders can make sure they are having the most impact with their dollars. This session will introduce research from the Grants Managers Network, and speakers from two foundations will share how they sharpened their organizations’ synapses with different models for integrating grants management into programs for increased effectiveness. Participants will discuss how they might apply similar habits and structures to blur organizational boundaries and, ultimately, improve learning and knowledge sharing internally.

*Speakers:*

*Jessica Bearman, Bearman Consulting*

*Sara Davis, The William and Flora Hewlett Foundation*

*Marc McDonald, AARP Foundation*

## Coming Together and Getting It Together

*Grand Ballroom (Fourth Floor Level)*

Most grantmakers are deploying multiple strategies to support a broader change agenda — whether it's through funding a strategic initiative, participating in a formal collaboration, blending place-based and policy change approaches, or looking across a programmatic portfolio. How can we tell whether these individual efforts or gains made in different places are adding up to meaningful, lasting change? And more importantly, how can grantmakers shape more co-creative, not top-down, planning processes and evaluation and learning activities so that they are relevant to everyone involved? This session explores these questions and offers guidance on how grantmakers can make the organizational shifts necessary to become more adept at developing collaborative approaches to learning. Speakers will draw from their experiences midway through The California Endowment's Building Healthy Communities Initiative, a 10-year investment in 14 sites across the state, where residents are setting local agendas and taking action to make their communities healthier. A funder, a grantee and an evaluation partner of this initiative will share advice on navigating the tensions that surface, as well as their successes in building community capacity and facilitating reflection, dialogue and collective learning processes.



*Speakers:*  
*Kathleen P. Enright,*  
*GEO (moderator)*



*Jim Keddy,*  
*The California Endowment*



*Manuel Pastor,*  
*USC Program for Environmental and Regional Equity*



*Diana Ross,*  
*Mid-City Community Advocacy Network*

**B1**

## Live with Performance Measurement Mavens! A Journey toward Organizational Transformation

*Cape Cod (Main Lobby Level)*

*Session designers: Cindy Eby and Kenzie Strong, Mile High United Way*

Grantmakers have a critical role to play in strengthening the evaluative capacity and practice of nonprofits so that these organizations can, ultimately, maximize their learning and impact. While many nonprofits share the desire to become more data and outcome driven, few opportunities exist to help transform them into strong, data-driven organizations. In fact, nonprofits face fairly significant barriers that constrain their ability to advance their practice. In this session, grantmakers will make reality TV–inspired confessionals about the adoption of promising capacity-building initiatives, while grantees will offer candid reflections on the effect this has had on both the internal and the external barriers they face. This session will provide participants with concrete strategies for partnering with grantees to transform evaluative practice and culture, and a deeper understanding of the resources and relational investment required for both nonprofits and funders to undertake this work.

*Speakers:*

*Cindy Eby, Mile High United Way*

*Danielle Scaturro, Edna McConnell Clark Foundation*

*Kenzie Strong, Mile High United Way*

*Mary Zanotti, Colorado Youth for a Change*

**B2**

## Designing, Piloting and Evaluating Major Shifts in Grantmaking Strategy

*Duxbury (Fourth Floor Level)*

*Session designer: Roberto Cremonini, GivingData LLC*

Grantmakers undertaking comprehensive transformation of their grantmaking strategy must find ways to embed learning with others in each step of the process so that those who are impacted by the change have a say in it. Using a case-method approach, participants in this session will discuss Open Society Foundations' two-year project that challenged 19 years of grantmaking practices in ways that would benefit both grantee organizations and its own operations. The project began in 2013 with a yearlong design phase. The following year six programs piloted and evaluated changes such as shifts in grantmaking authority and internal accountability practices. OSF staff and their advisor will share their experiences throughout the project, and participants will engage in a facilitated conversation and analysis of the transformation. Participants will also leverage this example to develop strategies for engaging stakeholders and learning in deeper partnership with others before and during major organizational transformation processes.

*Speakers:*

*Roberto Cremonini, GivingData LLC*

*Sandra Dunsmore, Open Society Foundations*

*Julie McCarthy, Open Society Foundations*

## B3 Learning with Diverse Communities through Culturally Responsive Evaluation

*Martha's Vineyard A (Main Lobby Level)*

*Session designer: Cheryl Chang, The David and Lucile Packard Foundation*

Funders recognize that learning with others leads to better results. Yet learning and evaluation agendas continue to be largely funder driven and seldom implemented in ways that reflect the knowledge, priorities and realities of nonprofits or the communities they serve. The Community Leadership Project, a co-funded initiative launched in 2010 to help build adaptive and sustainable organizations that serve low-income people and communities of color, employs a culturally responsive evaluation model and engages funders, re-granting intermediaries and numerous nonprofits with strong ties to diverse communities. During this session, speakers will share lessons learned and challenges from CLP and engage participants in lively discussions through case scenario analysis and paired sharing activities that will prepare them to implement culturally responsive evaluation of their programs. Participants will learn how to build their own capacity to commission culturally responsive evaluations as well as grantees' capacity to become more active participants in reflection and learning.

*Speakers:*

*Hanh Cao Yu, Social Policy Research Associates*

*Cheryl Chang, The David and Lucile Packard Foundation*

*Michael Courville, Open Mind Consulting*

## B4 Co-creating Knowledge with Social Justice Grantees

*Martha's Vineyard B (Fourth Floor Level)*

*Session designer: Barbara Osborn, University of Southern California's Annenberg School for Communication and Journalism, and Liberty Hill Foundation*

Learning with grantees can take many forms and can be an integral part of all foundation program activities. In this session, participants will learn about an array of collaborative models for learning with social justice grantees, developed by Liberty Hill Foundation and its partners. These approaches to research and evaluation engage grassroots grantees from the get-go, build their capacity and provide invaluable feedback to the foundation. Through a blend of presentations, small-group discussions and interactive activities that draw on attendees' own experiences and reflections, participants will discuss and articulate ways to replicate or adapt these models to develop rich learning experiences for their foundations and grantees.

*Speakers:*

*Barbara Osborn, University of Southern California's Annenberg School for Communication and Journalism, and Liberty Hill Foundation*

*Evelin Montes, Liberty Hill Foundation*

*Eric Wat, Special Service for Groups*

B5

## Building the Data-use Capacity of Multisector Grantees

Adrienne Salon (Fourth Floor Level)

Session designer: Marty Campbell, College Futures Foundation

Multisector community collaboratives have become an effective approach for addressing many complex social problems, and grantmakers often play a role in convening or sponsoring these initiatives. While research data can be a powerful driver of collaborative strategy and actionable outcomes, participating organizations may lack the capacity to collect or utilize data, and data sharing may not occur due to practical, technical or other difficulties. In order to fully leverage collaborative potential, it is necessary to develop trust and build data-use capacity among stakeholders. Join us for a discussion about the opportunities and inherent tensions in the use of data when engaging multiple stakeholders in a community initiative. Through concrete examples, session participants will learn strategies to understand and support grantees' capacity building in data inquiry, planning and use to support collaborative work.

Speakers:

Marty Campbell, College Futures Foundation

Amy Gerstein, John W. Gardner Center for Youth and Their Communities,  
Stanford University Graduate School of Education

B6

## Growing Your Organization's Ability to Open Source Social Change

Dedham (Fourth Floor Level)

Session designers: Nadia Owusu and Elizabeth Vargas, Living Cities, Inc.

Whether we like to admit it or not, our field can be closed, secretive and even fearful. There's an unwillingness to share what we're learning through our grantmaking, and when we do share it, it is often so long after the fact that others don't have the chance to take advantage of it. Knowledge sharing and communication can accelerate the development of effective solutions and meaningful impact on our world's toughest problems. Through a creative exercise, participants will reflect on behaviors and attitudes that support or undermine learning in their own work, and will consider how they might improve the two-way flow of information among people and organizations that share their goals. Participants will hear how Living Cities and others are experimenting with activities to engage in more open, near-real-time learning and will leave with some practical ways to advance learning culture and behaviors that generate stronger information, decisions and performance.

Speakers:

Nadia Owusu, Living Cities, Inc.

Elizabeth Vargas, Living Cities, Inc.

## 4:30 – 5:15 p.m. ACTIVE HOUR

Join an Active Hour activity to decompress, renew your energy and make connections. Preregistration is required, and space is limited. To learn more and to sign up, please visit the conference registration desk.

## 5:00 – 7:00 p.m. FAIL FEST AND EVENING RECEPTION

*Grand Ballroom & Grand Ballroom Terrace (Fourth Floor Level)*

*The reception starts at 5:00 p.m., and presentations begin at 5:30 p.m.*

*Fail Fest is supported by The Walton Family Foundation.*

Back by popular demand! There is universal recognition of the importance of learning from our failures, yet rarely do we take advantage of opportunities to do so. We have all flopped at something. Jumping on the latest philanthropy craze. Site visits gone awry. Disastrous miscommunication with grantees. Evaluations that spiral out of control. Strategic initiatives that lead us to be unstrategic, and more. When we share stories like these, we embrace our humility as grantmakers, honestly learn from our failures and affirm the value of taking risks. Talking about failure doesn't have to be painful or happen with hushed voices. Join this lively reception filled with cheerful camaraderie, good food and drinks. Raise your glass to and hear five grantmakers share candid stories of their favorite failures and hard lessons learned.



*Introductory Remarks:  
Jeff Poulos,  
Associated Grant Makers*



*Kevin Jennings,  
Arcus Foundation*



*Speakers:  
Victoria Dunning,  
The Global Fund  
for Children*



*Eric Kelly,  
Quantum Foundation*



*Mae Hong,  
Rockefeller Philanthropy  
Advisors (emcee)*



*Kelci Price,  
The Colorado Health  
Foundation*

## 7:00 – 9:00 p.m. DINE AROUNDS

*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 from the hotel. You can view restaurant options and sign up to join or host a group at the registration desk. **Diners should meet in the hotel lobby for a 6:45 p.m. departure.**



**WHAT WERE YOUR BIG TAKEAWAYS FROM TODAY?**

*An aha moment:*

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*My next action item:*

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**REFLECTIONS FROM DAY 1**

# THURSDAY JUNE 11

## 6:30 – 7:30 a.m. ACTIVE HOUR

Join an Active Hour activity to decompress, renew your energy and make connections. Preregistration is required, and space is limited. To learn more and to sign up, please visit the conference registration desk.

## 8:00 – 9:00 a.m. NETWORKING BREAKFAST

*Grand Ballroom (Fourth Floor Level)*

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

## 9:30 – 11:15 a.m. SHORT TALKS

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

TIME SLOT	MARTHA'S VINEYARD (MAIN LOBBY LEVEL)	CAPE COD (MAIN LOBBY LEVEL)
Round 1: 9:30 – 9:55	1. Andrew Means	2. Tiffany Cooper Gueye
Round 2: 10:10 – 10:35	3. Eric Shih	4. Stephanie Evergreen
Round 3: 10:50 – 11:15	5. Rajasvini Bhansali	6. Josh Lerner

## ROUND 1 OPTIONS:

### 1 The Fundamental Flaw of the Social Sector



*Andrew Means, The Impact Lab  
Martha's Vineyard*

In this short talk, Andrew Means, founder of The Impact Lab, will talk about the fundamental flaw of the social sector: the lack of real-time information about what is working. This leads to distortions in the philanthropic market that hamper our abilities to make the progress we seek. Never fear, there's still hope!

Data science can correct these distortions and radically change the way the social sector works. Means will share stories from his work applying the tools and methods of data science to social problems and lay out a vision for how data can help us make a more efficient and effective sector.

### 2 What's Your Agenda?



*Tiffany Cooper Gueye, BELL  
Cape Cod*

We all want philanthropic dollars to support "what works" to strengthen communities and improve lives. Resources flowing to interventions and social solutions in this way would provide more clarity on how to solve social ills, prepare a larger proportion of today's nonprofits to tackle them and would ultimately lead to a greater impact for beneficiaries. Unfortunately, that is not how the

field currently operates. To demonstrate the state of the field, Tiffany Cooper Gueye will present her organization's experience of building a culture and infrastructure for performance management, and its participation in two randomized controlled trial studies. Gueye will put forth a definition of high performance as well as describe the role grantmakers have played in creating both opportunity and significant risk for nonprofits. During this session, grantmakers will consider how a focus on outcomes can create unintended circumstances and how they can instead ask themselves and their grantees a key question: "What's your agenda?"

## ROUND 2 OPTIONS:

### 3 Making Failure Count: Metrics That Matter, Metrics That Don't



*Eric Shih, Groundswell  
Martha's Vineyard*

As "failing fast" becomes commonplace everywhere from startups to social impact organizations, how can grantmakers and grantees reimagine program evaluation to better account for rapid experimentation and risk taking on the path to innovative breakthroughs and transformative change? Eric

Shih will share how one nonprofit drew on the Lean Startup framework to redesign its own assessment processes, establish new metrics and enable faster learning across the organization that unlocked new insights into program effectiveness and scalable impact.

## 4 Presenting Data Effectively



*Stephanie Evergreen, Evergreen Data  
Cape Cod*

Designing charts and graphs is about more than making things look pretty. Ultimately, we report and present our information to teach our audience, to get our content firmly planted in their knowledge base, and to help them act and make decisions. Unthoughtful data visualization costs audience time, money and patience. It cuts the conversation short. Intentional data

visualization clears the way for thought leadership and intellectual discussion. Stephanie Evergreen will tell the stories of how effective data presentation shifts organizational culture and changes the conversation.

## ROUND 3 OPTIONS:

### 5 30 Years of Mistakes, Misfits and Magic



*Rajasvini Bhansali, IDEX  
Martha's Vineyard*

International Development Exchange (IDEX) partners with funders and donors to provide flexible, small grants to effective, locally based organizations in Asia, Africa and Latin America led by women, youth and indigenous leaders. IDEX believes that by investing in those on the front lines who are shaping solutions to urgent issues we can achieve a just and sustainable

world for all of us. Representing communities that contribute least to large-scale, global problems, like climate change, poverty and our broken food system, but are often the most impacted by them, these leaders are often marginalized as misfits. Through authentic engagement, IDEX has learned many lessons about investing in risky work, staying the course and not bailing when things get tough. Join IDEX's executive director, Rajasvini Bhansali, to hear about how the organization learned from its early mistakes — and then made some more — before finding ways to build an internal work culture and grantmaking practices that truly reflect its external priorities of global engagement and community.

### 6 Learning Together by Deciding Together: Participatory Budgeting and the Impacts of Engagement



*Josh Lerner, Participatory Budgeting Project  
Cape Cod*

Elected officials, like grantmakers, typically allocate millions of dollars each year. Increasingly, officials are opening up these funding decisions through “participatory budgeting” to maximize the impact of scarce resources. This year, officials in 15 cities across the United States and Canada are engaging 40,000 people in deciding how to spend \$42 million. In

this short talk, Josh Lerner will explain how these cities are engaging diverse stakeholders in complex learning and decision making, and in the process redirecting resources to better address community needs.

11:30 a.m. – 12:15 p.m.

## MODERATED CONVERSATIONS WITH SHORT TALK SPEAKERS

Want to hear more from a short talk speaker who piqued your interest? Did you miss a short talk that you wish you could have attended? In this session, you will have the opportunity to join a short talk speaker for a moderated conversation that will answer your questions and expand upon the ideas presented earlier.

<b>C1</b>	<b>Andrew Means, The Impact Lab</b> Meghan Duffy, GEO (moderator)	<i>Plymouth (Fourth Floor Level)</i>
<b>C2</b>	<b>Tiffany Cooper Gueye, BELL</b> Ify Mora, Barr Foundation (moderator)	<i>Dedham (Fourth Floor Level)</i>
<b>C3</b>	<b>Eric Shih, Groundswell</b> Joshua Joseph, The Pew Charitable Trusts (moderator)	<i>Duxbury (Fourth Floor Level)</i>
<b>C4</b>	<b>Stephanie Evergreen, Evergreen Data</b> Rosanna Tran, California HealthCare Foundation (moderator)	<i>Adrienne Salon (Fourth Floor Level)</i>
<b>C5</b>	<b>Rajasvini Bhansali, IDEX</b> Ramani Sripada, Associated Grant Makers (moderator)	<i>Martha's Vineyard (Main Lobby Level)</i>
<b>C6</b>	<b>Josh Lerner, Participatory Budgeting Project</b> Lori Bartczak, GEO (moderator)	<i>Cape Cod (Main Lobby Level)</i>

THURSDAY JUNE 11

12:30 – 2:00 p.m.

## CLOSING PLENARY LUNCHEON: LEARNING TOGETHER TO BUILD COMMUNITY KNOWLEDGE AND A PUBLIC VOICE

*Grand Ballroom (Fourth Floor Level)*

Grantmakers can miss a lot and limit our own learning when we do not engage with stakeholders outside of our organizations. Too often, we are using sources like government records, consumer data or Facebook as a substitute for real-life dialogue about what people want and need. But there is a danger, cautions Ceasar McDowell, president of the Interaction Institute for Social Change and a professor at MIT, in being too data driven when working with people. McDowell urges social change seekers, grantmakers included, to focus more on building relationships so we can co-develop solutions that address the daily experiences and aspirations of community members. Drawing on efforts happening in Boston and elsewhere, McDowell will explore approaches to civic engagement where broad groups of people share ideas and visions for the future. He'll offer shifts — both large and small — grantmakers can make to generate community knowledge and shared understanding. Participants will leave the conference reminded that the ultimate purpose of learning together is ensuring that everyone in a community, especially those traditionally excluded, can voice and act on the issues that impact their lives.



*Introductory Remarks:*

*Danielle Breslin,*

*Blue Cross and Blue Shield of North Carolina Foundation*



*Speakers:*

*Ceasar McDowell,*

*Interaction Institute for Social Change*



*Heather Peeler,*

*GEO*

## 2:30 – 5:00 p.m. POST-CONFERENCE WORKSHOP

Duxbury (Fourth Floor Level)

This session requires advance registration and an additional fee (\$100).  
Consult the registration desk for space availability.

### **W1** System Mapping Made Simple(r)

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

Philanthropy is increasingly focused on supporting multiple actors working in alignment to change complex systems. For these efforts to succeed, a single foundation rarely can act as the lone “command center” for strategy design and implementation, and learning activities need to address more than just what that funder might find useful. When strategic decision making is decentralized among many independent actors who must adapt in response to one another’s efforts, decision makers need to better understand the systems in which they operate to make choices that align with the interests of the whole. This practical, hands-on workshop will introduce system mapping as a tool to support learning among funders, grantees and other actors within complex systems. Participants will hear about real-life applications from peers to understand when and why this approach is useful. Then, they will engage in a small-group diagramming exercise to experience firsthand the system-mapping process and develop introductory skills to use it as a learning tool in their own work.

Speakers:

Tanya Beer, Center for Evaluation Innovation

Julia Coffman, Center for Evaluation Innovation

Tiffany M. Griffin, Democracy Fund

THURSDAY JUNE 11

## WHAT ARE YOU TAKING HOME?

*I learned:*

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*I re-learned:*

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*I was surprised:*

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*I met:*

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*I plan to:*

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REFLECTIONS  
FROM DAY 2



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

In a changing world where the old rules of philanthropy no longer apply, we help grantmakers keep pace by connecting them with innovative answers to field wide challenges. GEO is a community of more than 500 grantmaking organizations that are committed to supporting more efficient and effective nonprofit organizations.

We help grantmakers improve practices in areas that have been identified as critical to nonprofit success: strengthening relationships with grantees, supporting nonprofit resilience, using learning for improvement and collaborating for greater impact. Throughout the year, GEO's members ask tough questions, offer cutting-edge ideas and share examples of what works (and what doesn't) in philanthropy.

Sustain the momentum and share the energy from this conference with your colleagues through access to hundreds of philanthropy-related resources and publications from GEO and partners, peer-to-peer problem-solving opportunities, online resources, conferences and so much more.

**Not yet a GEO member?  
Join the GEO community today!**

Contact us at  
[membership@geofunders.org](mailto:membership@geofunders.org)  
or 202.898.1840 to receive a  
10 percent discount off your first  
year of GEO membership.  
Offer valid for a limited time.

**Save the dates for these  
upcoming GEO conferences:**

### **The Collaboration Conference 2015**

November 16 – 17, 2015  
Houston  
Registration opens summer 2015

### **2016 National Conference**

May 2 – 4, 2016  
Minneapolis – Saint Paul  
Registration opens early 2016



# NETWORKING BINGO

B	I	N	G	O
<p>Works for a community foundation</p> <p>SIG:</p>	<p>First time attending a GEO conference</p> <p>SIG:</p>	<p>Has a staff role similar to yours</p> <p>SIG:</p>	<p>Works for a foundation that funds internationally</p> <p>SIG:</p>	<p>Attended this year's Fail Fest</p> <p>SIG:</p>
<p>Has run/walked a 5K, 10K, half or full marathon</p> <p>SIG:</p>	<p>From or currently lives in MA</p> <p>SIG:</p>	<p>Involved in a funder collaborative</p> <p>SIG:</p>	<p>Has traveled out of the country</p> <p>SIG:</p>	<p>Gives GOS or multiyear support</p> <p>SIG:</p>
<p>Funds grantees' evaluation capacity</p> <p>SIG:</p>	<p>Speaks two languages</p> <p>SIG:</p>	<p><b>FREE SPACE</b></p>	<p>First time visiting Boston</p> <p>SIG:</p>	<p>Supports learning communities</p> <p>SIG:</p>
<p>Attended the same breakout session as you</p> <p>SIG:</p>	<p>Used Twitter #GEOLearn</p> <p>SIG:</p>	<p>Works for a family foundation</p> <p>SIG:</p>	<p>Speaker at GEO's 2015 Learning Conference</p> <p>SIG:</p>	<p>Has visited the state where you work</p> <p>SIG:</p>
<p>Has read a GEO publication</p> <p>SIG:</p>	<p>Has embraced failure in his/her work</p> <p>SIG:</p>	<p>Downloaded the GEO Learning Conference app</p> <p>SIG:</p>	<p>Attended GEO's 2014 National Conference</p> <p>SIG:</p>	<p>Has a similar funding focus to yours</p> <p>SIG:</p>



Your Name \_\_\_\_\_

Organization \_\_\_\_\_

Mobile Phone \_\_\_\_\_

Email \_\_\_\_\_

### How to Play

The goal of this game is to make new and unexpected connections! On the other side of this sheet, you will find your Networking Bingo card. Each square lists a potential characteristic of a conference participant. Throughout the conference, collect at least one unique signature from a participant who has that characteristic. Your ultimate goal is to get "BINGO" (five consecutive signatures up, down, across or diagonally).

### How to Win an iPad Mini!

Once you get BINGO, tear out and drop your completed card into the Networking Bingo Box located at registration. Then your card will be entered into a drawing for you to win an iPad Mini.

*Cards must be turned in by Thursday, June 11, at 8:00 a.m.*

*The winner will be announced at the Networking Breakfast.*

GEO publications keep grantmakers informed of the emerging trends, debates and practices from the field of philanthropy. The following are available in hard copy. Please indicate how many copies you would like to order:

- Learning Together: Actionable Approaches for Grantmakers*
- Is Grantmaking Getting Smarter?*
- 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*
- Catalyzing Networks for Social Change*
- Widespread Empathy: 5 Steps to Achieving Greater Impact in Philanthropy*
- Evaluation in Philanthropy*

You can access digital copies of all GEO publications, including online-only titles like *Strengthening Nonprofit Capacity* and *Evaluating Community Change*, 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. Put your completed card in any of the evaluation drop boxes or hand it to a GEO staffer. You can also offer immediate feedback through the "Rant/Rave" function on the conference app.

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# GEO PUBLICATIONS REQUEST FORM

To order print copies of GEO publications, fill out your contact information below and drop this card off at the registration desk or in any of the evaluation collection boxes. GEO members receive printed copies of all GEO publications in the mail as soon as they are available, and can order up to 15 more complimentary copies. Following the conference, nonmembers may purchase printed copies of publications for \$12 each, plus shipping costs. Contact Shayda Rezazad, at 202.898.1840 or rezazad@geofunders.org, with any questions.

Name \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (        ) \_\_\_\_\_

Email \_\_\_\_\_

In what ways could this conference be improved? We can't learn from our mistakes unless we know about them, so please share with us your feedback. Put your completed card in any of the evaluation drop boxes or hand it to a GEO staffer. You can also offer immediate feedback through the "Rant/Rave" function on the conference app.

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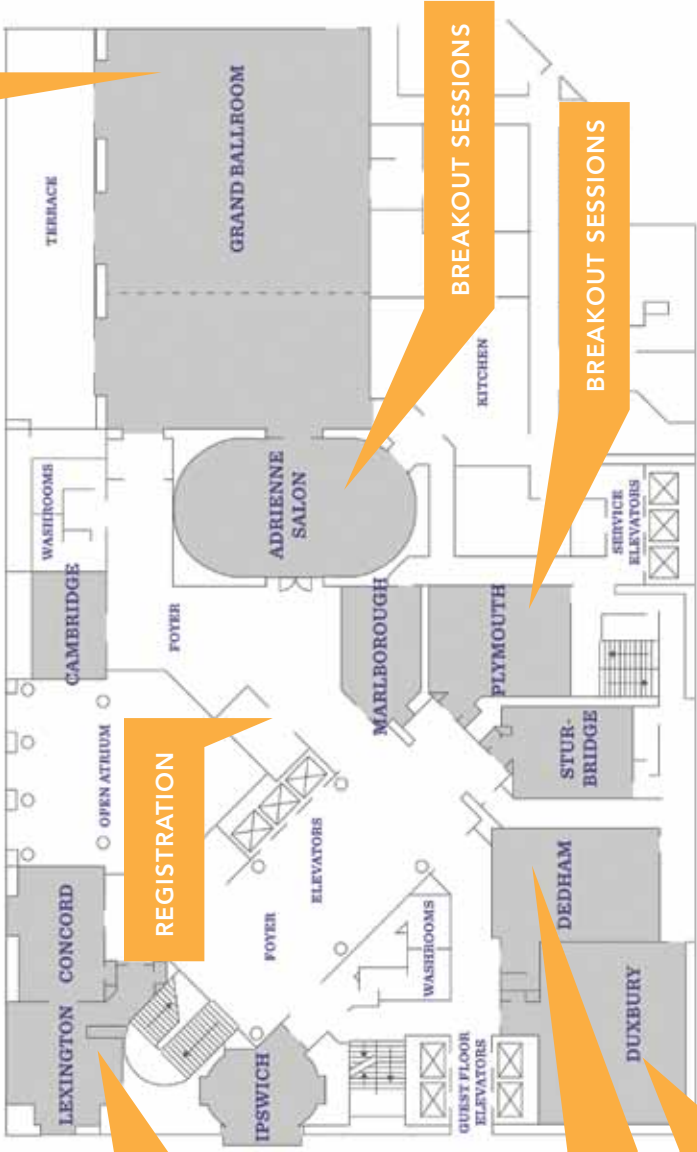
# FLOOR PLANS

## MAIN LOBBY LEVEL



# FOURTH FLOOR LEVEL

PLENARY SESSIONS  
& FAIL FEST



GEO MEMBER  
LOUNGE

REGISTRATION

BREAKOUT SESSIONS

BREAKOUT SESSIONS

BREAKOUT SESSIONS

BREAKOUT SESSIONS

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