

Grantmakers
for Effective
Organizations
presents



2016

GEO

**MINNEAPOLIS-
SAINT PAUL**

NATIONAL CONFERENCE

May 2-4, 2016 • #2016GEO • bit.ly/2016GEO



Held in partnership with
Minnesota Council on Foundations



Grantmakers for Effective Organizations is a diverse community of more than 500 grantmakers working to reshape the way philanthropy operates. Understanding that grantmakers are successful only to the extent that their grantees achieve meaningful results, GEO promotes strategies and practices that contribute to grantee success. We help grantmakers improve practices in areas 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. More information on GEO and a host of resources and links for grantmakers are available at www.geofunders.org.

OUR PARTNER



MINNESOTA COUNCIL
ON FOUNDATIONS

The Minnesota Council on Foundations works actively to expand and strengthen a vibrant community of diverse grantmakers who individually and collectively advance the common good. MCF members represent three-quarters of all grantmaking in the state, awarding more than \$1 billion annually. Members include private family and independent foundations, community and other public foundations, and corporate foundations and giving programs. MCF helps grantmakers prepare to take on the challenges of improving Minnesota communities now and in the future. With our specialized programming, publications, and extensive networking and leadership opportunities, MCF membership equips you for 21st-century grantmaking. For more information, visit www.mcf.org.

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Social Media Resources



Conference App

The conference app contains the important details and fun information needed to take full advantage of your conference experience. To download the app, simply visit <https://crowd.cc/s/cHrm> or scan the QR code below. The conference app is supported by the General Mills Foundation.



Twitter

#2016GEO

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

@GEOfunders

GEO's Twitter handle; follow it for updates during the conference and for news, resources and opportunities throughout the year. Also, find other conference participants on Twitter using our Twitter list "2016GEO."

LinkedIn

bit.ly/LinkedInGEO

GEO members are invited to join our LinkedIn group to connect with other members and to exchange news and ideas that don't quite fit into 140 characters. The group is open only to GEO members, and GEO staff regularly post resources, learning opportunities, job openings and more.

The Huffington Post

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

Additional Resources for Grantmakers

www.geofunders.org

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

Welcome

Welcome to Minneapolis – St. Paul for GEO's 2016 National Conference, held in partnership with the Minnesota Council on Foundations. Eight hundred grantmakers from across the country are coming together to talk and work to find more efficient and effective ways to grow their impact. We are thrilled that you will be contributing your voice to this conversation.

The conference planning committee set an ambitious goal for itself: to design a conference that delivers highly interactive and informative sessions, ample and varied opportunities for networking and peer learning, and the chance to experience the Twin Cities and the local nonprofit community. It's our hope that these three days will provide you with the information, connections and experiences to continue in your path as a leader in your organization and the philanthropic sector.

While you're here, you'll have the opportunity to hear from a broad and diverse selection of voices in a variety of different formats. You can choose from more than 30 breakout sessions, which were designed by members of the GEO community and will dive into a number of different topics. You will be energized by succinct, fresh perspectives from thought leaders in our Short Talks. You will get to hear from a number of speakers at plenaries about culture, equity and leadership. We're also taking to heart the feedback we've received from past conferences to deliver more of what we've heard you want: we'll be featuring moderated Q&A sessions with speakers after their Short Talks and encore sessions voted on by you during the conference.

Outside of all of these sessions, you'll have even more opportunities to connect and learn with your peers. Our

welcome reception will provide an evening of networking. Our Conversation Salon space will feature informal, peer-led gatherings — we encourage you to join one or sign up to host one of your own! We're also partnering with the National Committee for Responsive Philanthropy for the 2016 Impact Awards, a night where we'll celebrate grantmakers who truly represent philanthropy at its best. Less formal events — like Active Hours and Dine Arouds — will also take place throughout the conference, providing an opportunity for more informal connections.

We also want to make sure that you have the chance to see more of Minneapolis – St. Paul and its nonprofit community. During our optional Site Visits, you'll get to witness the vibrancy of the nonprofit and philanthropic sectors in the region. These visits are a great way to deepen your understanding of how smarter grantmaking practices positively impact nonprofit effectiveness, and they also give you another opportunity to make new connections with your peers.

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 as well as our partner, the Minnesota Council on Foundations. Thank you for joining us in Minneapolis – St. Paul. We hope you'll find the next three days full of new connections and new ideas.



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 "Bob Uyeki".

Bob Uyeki
Chief Executive Officer
Y & H Soda Foundation
Conference Planning Committee Chair

GEO conferences offer a great opportunity for participants to make connections with their peers, hear fresh ideas and ask questions related to shared challenges.

Visit the conference registration desk to take advantage of these networking and peer-learning opportunities:

AMBASSADOR PROGRAM

GEO's Ambassador Program facilitates and deepens both first-time and seasoned participants' networking experiences. Those who are new to GEO are making the most of the conference by tapping the knowledge of a seasoned GEO member. If you have questions, feel free to ask anyone with an Ambassador button on their name tag — they are, along with any GEO staff member, happy to help!

CONVERSATION SALON

The Conversation Salon (located in Minnehaha) provides a space for participants to self-organize and talk informally about commonalities, specific burning questions or whatever's on your mind. Sign up to lead a conversation during an opening on the Salon schedule or stop by to join a participant-led discussion. Log in to the conference app to view prescheduled Salon conversations.

MEMBER LOUNGES

Connect with other GEO members in one of the two member lounges. The Member Link Lounge (located in Nicollet Promenade) is open for networking, meetups and refreshments. The Member Recharge Room (located in St. Croix) is available for a quiet space to check email or take a quick break.

NETWORKING BINGO

Make new and unexpected connections with fellow participants! Complete a bingo card by collecting unique signatures from participants who meet specific characteristics. Your ultimate goal is "BINGO!" Check out pages 31–32 for more information.

DINE AROUNDS

Host or 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.

CONTENT TRACKS

Breakout sessions and activities on the 2016 National Conference schedule fall into content tracks prioritized by GEO and members who served on the volunteer conference planning and host committees. The thematic tracks represent some of the grantmaking practices that are most supportive of nonprofit success. Tracks are indicated in the program with the following icons:



COLLABORATING FOR GREATER IMPACT

Dig into the experiences of collaboration practitioners across a variety of issue areas and contexts. In the company of peers, you will tackle specific challenges and practices related to funders improving partnerships with each other and better supporting collaboration among your grantees.



LEADING CHANGE IN PHILANTHROPY

Gain exposure to different vehicles that grantmakers can use to accelerate the pace of social change. And, because change often starts from within, uncover how your organization's beliefs, behaviors and internal culture may drive or impede effective work.



LEARNING FOR IMPROVEMENT

Discuss how evaluation and learning can be used to make real-time improvements to your work and to nurture a learning culture within your organization. Explore strategies for learning more collaboratively, ensuring that grantees and other partners also have the information they need to drive decisions that enhance their work.



SUPPORTING NONPROFIT RESILIENCE

Delve into the kinds of support that contribute to strong and effective nonprofit organizations by engaging directly with nonprofit leaders and peer grantmakers. Share what you're learning about building the kind of capacity that helps grantees focus on long-term mission fulfillment, build critical skills, and adapt and thrive. Explore how our community can build upon those successes.



STRENGTHENING RELATIONSHIPS

Examine what you can do to build trust with grantees and others, obtain and apply authentic feedback, and incorporate key stakeholders more purposefully in your work. Discover new ideas for bringing outside voices into decision-making and planning efforts and reducing the inherent power imbalance between funders and the communities we serve.



NETWORKING

Make new connections or join up with old friends in activities throughout the conference that will get you moving and networking with other participants. From the Ambassador Program and the Welcome Reception to Active Hours and Dine Arouns, you will deepen your conference experience and leave with peer support to turn new knowledge into action at home. Finally, be sure to stop by communal spaces like the members-only lounges and the Conversation Salon designed to encourage more intimate sharing and learning.



REGISTRATION is open from 5:00 to 7:00 p.m. in the Nicollet Promenade.

5:00 – 7:00 P.M.

EARLY ARRIVERS HAPPY HOUR

Greenway Promenade (Second Floor)



REGISTRATION is open from 8:00 a.m. to 6:00 p.m. in the Nicollet Promenade.

THE MEMBER LINK LOUNGE is open from 8:00 a.m. to 5:30 p.m. in Nicollet Promenade for networking, meetups or refreshments.

THE MEMBER RECHARGE ROOM is open from 8:00 a.m. to 5:30 p.m. in St. Croix for checking email, grabbing a cup of coffee or a snack, or taking a quick break.

THE CONVERSATION SALON is open from 9:30 a.m. to 5:30 p.m. in Minnehaha for self-organized discussions about commonalities, specific challenges or whatever's on your mind. Log in to the conference app to view prescheduled conversations.

9:00 – 11:30 A.M.

SITE VISITS

(Optional. Advance registration and payment are required.)

- S1.** Putting Equity in the Driver's Seat: Central Corridor Funders Collaborative (*Off-site*)
- S2.** Improving Impact Through Creative Practices and Placemaking: Pillsbury United Communities (*Off-site*)

9:30 – 11:30 A.M.

PRE-CONFERENCE WORKSHOPS

(Optional. Advance registration and payment are required.)

- W1.** In an Election Season, What Should All Foundations Know About Advocacy? 🗳️ *Lakeshore C (First Floor)*
- W2.** Mobilizing for Social Change 🗳️ *Mirage (Second Floor)*
- W3.** A New Approach to Collaborative System Change 🗳️ *Greenway Ballroom A/J (Second Floor)*
- W4.** Kick-Start Your Conference and Get to Know the GEO Community 🌐 *Regency Room (Second Floor)*

11:30 A.M. – 12:00 P.M.

BREAK

12:00 – 1:45 P.M.

OPENING PLENARY LUNCHEON: CULTURE MATTERS

Nicollet Grand Ballroom (First Floor)

1:45 – 2:15 P.M.

BREAK

2:15 – 3:30 P.M.

BREAKOUT SESSIONS ROUND A

(Select one of 10 options.)

- A1.** Helping Grantees Build Fundraising Capacity 💰 *Greenway Ballroom A/J (Second Floor)*
- A2.** Trust Building: Transparency, Triumphs and Tribulations 🗳️ *Greenway Ballroom B/C (Second Floor)*
- A3.** Hoping for Smooth Sailing But Planning for Rough Seas 🗳️ *Greenway Ballroom D/E (Second Floor)*
- A4.** How to Leverage the Law for Greater Impact 🗳️ *Greenway Ballroom F/G (Second Floor)*
- A5.** Funder Collaboration for Policy Change 🗳️ *Greenway Ballroom H/I (Second Floor)*
- A6.** Responsive Neighborhood Investment Amid Police Conflict and Community Upheaval 🗳️ *Regency Room (Second Floor)*
- A7.** Harmonizing Strategy and Learning 🗳️ *Mirage (Second Floor)*
- A8.** Supporting Capacity Building Through Crowdsourcing 💰 *Skyway A/B (Second Floor)*
- A9.** Advancing Racial Equity and Inclusion Through System Leadership 🗳️ *Lakeshore A (First Floor)*
- A10.** Grantee Inclusion? Am I Included? Navigating Power Dynamics and Relationships for More Inclusive Grantmaking 🗳️ *Lakeshore B/C (First Floor)*

4:00 – 5:00 P.M.

ACTIVE HOUR

(Optional. Advance registration is required.)

5:30 – 7:30 P.M.

WELCOME RECEPTION AT ORCHESTRA HALL

Tuesday May 3

REGISTRATION is open from 8:00 a.m. to 6:00 p.m. in the Nicollet Promenade.

THE MEMBER LINK LOUNGE is open from 8:00 a.m. to 5:30 p.m. in Nicollet Promenade for networking, meetups or refreshments.

THE MEMBER RECHARGE ROOM is open from 8:00 a.m. to 5:30 p.m. in St. Croix for checking email, grabbing a cup of coffee or a snack, or taking a quick break.

THE CONVERSATION SALON is open from 8:00 a.m. to 5:00 p.m. in Minnehaha for self-organized discussions about commonalities, specific challenges or whatever's on your mind. Log in to the conference app to view prescheduled conversations.

6:30 – 7:30 A.M.

ACTIVE HOUR

(Optional. Advance registration is required.)

8:00 – 9:00 A.M.

NETWORKING BREAKFAST

Nicollet Grand Ballroom (First Floor)

9:15 – 11:00 A.M.

SHORT TALKS

ROUND 1 • 9:15 – 9:40 A.M. (Select one of three options.)

- 1A.** Want to Support Communities of Color? Stop Trickle-Down Community Engagement • *Vu Le, Rainier Valley Corps and Nonprofit With Balls*
Regency Room (Second Floor)
- 1B.** Collaborating Across Sectors to Build Better Lives for Immigrants • *Frank Mirabal, City of Albuquerque*
Greenway Ballroom F/G (Second Floor)
- 1C.** Here for Good • *MayKao Y. Hang, Amherst H. Wilder Foundation*
Mirage (Second Floor)

ROUND 2 • 9:55 – 10:20 A.M. (Select one of three options.)

- 2A.** Place-Based Change Requires Supporting Creative Leaders • *Laura Zabel, Springboard for the Arts*
Regency Room (Second Floor)
- 2B.** Philanthropy's Role in Times of Crisis • *Isaiah Oliver, Community Foundation of Greater Flint*
Greenway Ballroom F/G (Second Floor)
- 2C.** Let's Rewrite the Social Contract Between Grantmakers and Grantees • *Deepak Bhargava, Center for Community Change*
Mirage (Second Floor)

ROUND 3 • 10:35 – 11:00 A.M. (Select one of three options.)

- 3A.** Culture by Design and the Unexpected Role of Happiness • *Sunny Grosso, Delivering Happiness*
Regency Room (Second Floor)
- 3B.** Turning Moments Into Movements • *Alicia Garza, National Domestic Workers Alliance and the Black Lives Matter network*
Greenway Ballroom F/G (Second Floor)
- 3C.** The Purpose Gap • *Aaron Hurst, Imperative*
Mirage (Second Floor)

11:15 A.M. – 12:00 P.M.

MODERATED Q&A WITH SHORT TALK SPEAKERS

(Select one of nine options.)

- 1A.** Vu Le, Rainier Valley Corps and Nonprofit With Balls
Lakeshore B/C (First Floor)
- 1B.** Frank Mirabal, City of Albuquerque
Greenway Ballroom A/J (Second Floor)
- 1C.** MayKao Hang, Amherst H. Wilder Foundation
Greenway Ballroom B/C (Second Floor)
- 2A.** Laura Zabel, Springboard for the Arts
Skyway A/B (Second Floor)
- 2B.** Isaiah Oliver, Community Foundation of Greater Flint
Greenway Ballroom H/I (Second Floor)
- 2C.** Deepak Bhargava, Center for Community Change
Lakeshore A (First Floor)
- 3A.** Sunny Grosso, Delivering Happiness
Regency Room (Second Floor)
- 3B.** Alicia Garza, National Domestic Workers Alliance and the Black Lives Matter network
Greenway Ballroom F/G (Second Floor)
- 3C.** Aaron Hurst, Imperative
Mirage (Second Floor)

12:15 – 1:45 P.M.

PLENARY LUNCHEON: EQUITY AS AN EFFECTIVENESS IMPERATIVE

Nicollet Grand Ballroom (First Floor)

1:45 – 2:15 P.M.

BREAK

2:15 – 3:30 P.M.

BREAKOUT SESSIONS ROUND B

(Select one of 10 options.)

- B1.** Building Internal Culture to Achieve External Results 🧩
Lakeshore A (First Floor)
- B2.** Real Cost. Real Outcomes. What Funders Need to Know 💰
Lakeshore B/C (First Floor)
- B3.** Supporting Beneficiary Feedback Loops 📄
Greenway Ballroom A/J (Second Floor)
- B4.** New Frameworks for Measuring Capacity and Assessing Performance 💰 *Greenway Ballroom B/C (Second Floor)*
- B5.** Better Funder Collaboration Yields Greater Grantee Collaboration 🧑‍🤝🧑 *Greenway Ballroom D/E (Second Floor)*
- B6.** From Scarcity and Competitiveness to Abundance and Collaboration 🧑‍🤝🧑 *Greenway Ballroom F/G (Second Floor)*
- B7.** How Does Your Approach to Evaluation Measure Up? 📄
Greenway Ballroom H/I (Second Floor)
- B8.** Walking the Talk of Diversity, Equity and Inclusion From the Inside Out 🗣️ *Regency Room (Second Floor)*
- B9.** Adventures in Mixing For-Profit Investment With Philanthropy 💰 *Skyway A/B (Second Floor)*
- B10.** A Values-Based Approach to Next-Generation Philanthropy 🗣️ *Mirage (Second Floor)*

Wednesday May 4

3:30 – 4:00 P.M.

BREAK

3:45 – 6:15 P.M.

SITE VISITS

(Optional. Advance registration and payment are required.)

- S3.** How Trusting Relationships Fuel Nonprofit Innovation: Second Harvest Heartland (*Off-site*)
- S4.** Closing the Gap to Sustainability: Northside Achievement Zone (*Off-site*)
- S5.** Collaborative Solutions in the Twin Cities' Somali Community: People's Center Health Services (*Off-site*)

4:00 – 5:15 P.M.

BREAKOUT SESSIONS ROUND C

(Select one of 10 options.)

- C1.** How Can Foundation Boards Reach Their Peak Potential? (Trustees Only) 📍 *Lakeshore A (First Floor)*
- C2.** The Skills to Pay the Bills 💰 *Skyway A/B (Second Floor)*
- C3.** From Ideas to Actions: Managing Implementation to Achieve Results 📄 *Greenway Ballroom A/J (Second Floor)*
- C4.** Enhancing Learning Through Relationship Building 🌐 *Greenway Ballroom B/C (Second Floor)*
- C5.** Nurturing a Community and Its People Through Rural, Place-Based Philanthropy 💰 *Greenway Ballroom D/E (Second Floor)*
- C6.** Learning and Assessment for Unrestricted Operating Support: Assessing What Matters 📄 *Greenway Ballroom F/G (Second Floor)*
- C7.** No Trust Falls: Planning the Retreat You Want to Attend 🌐 *Greenway Ballroom H/I (Second Floor)*
- C8.** Building the Strategy Plane While Flying It 📍 *Lakeshore B/C (First Floor)*
- C9.** Responding Collectively to Community Flashpoints 🗨️ *Regency Room (Second Floor)*
- C10.** Ramping Up Funders' Impact With More Than Money 🗨️ *Mirage (Second Floor)*

6:00 – 7:30 P.M.

CEO AND TRUSTEE RECEPTION

(Invitation Only)

7:00 – 9:00 P.M.

DINE AROUNDS

(Optional. Advance registration is required.)

7:30 – 9:00 P.M.

NCRP IMPACT AWARDS

Northstar A (Second Floor)

REGISTRATION is open from 8:00 a.m. to 2:00 p.m. in the Nicollet Promenade.

THE MEMBER LINK LOUNGE is open from 8:00 a.m. to 2:00 p.m. in Nicollet Promenade for networking, meetups or refreshments.

THE MEMBER RECHARGE ROOM is open from 8:00 a.m. to 11:00 a.m. in St. Croix for checking email, grabbing a cup of coffee or a snack, or taking a quick break.

THE CONVERSATION SALON is open from 8:00 a.m. to 11:00 a.m. in Minnehaha for self-organized discussions about commonalities, specific challenges or whatever's on your mind. Log in to the conference app to view prescheduled conversations.

6:30 – 7:30 A.M.

ACTIVE HOUR

(Optional. Advance registration is required.)

8:00 – 9:00 A.M.

NETWORKING BREAKFAST

Nicollet Grand Ballroom (First Floor)

9:15 – 10:30 A.M.

BREAKOUT SESSIONS ROUND D AND ENCORE SESSIONS (Select one of eight options.)

- D1.** Tools for Big Picture Grantmaking and Influencing Systems 🗨️ *Lakeshore A (First Floor)*
- D2.** Your Leadership, Your Reflective Practice 📍 *Lakeshore B/C (First Floor)*
- D3.** Addressing Race and Equity at Community Foundations 🌐 *Greenway Ballroom A/J (Second Floor)*
- D4.** Laying the Groundwork for Shared Measures 📄 *Greenway Ballroom B/C (Second Floor)*
- D5.** Supporting Leadership Development in Social Justice Organizations 💰 *Greenway Ballroom D/E (Second Floor)*

ENCORE SESSIONS: Too many options to choose from? Based on your 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 page 28.

- D6.** Encore 1 – Determined by popular vote *Greenway Ballroom F/G (Second Floor)*
- D7.** Encore 2 – Determined by popular vote *Greenway Ballroom H/I (Second Floor)*
- D8.** Encore 3 – Determined by popular vote *Skyway A/B (Second Floor)*

10:30 – 11:00 A.M.

BREAK

11:00 A.M. – 1:30 P.M.

CLOSING PLENARY BRUNCH: CONNECTING TO PURPOSE AND MAKING MEANING OF WHAT WE'VE LEARNED

Nicollet Grand Ballroom (First Floor)



Sunday May 1

EXPLORING MINNEAPOLIS – ST. PAUL

Are you extending your visit or looking for opportunities to get out and explore our host city? Consider visiting these local attractions to get a better taste of Minneapolis – St. Paul. You can also visit the conference registration desk for more information on local family-friendly attractions and downtown dining options.

CHAIN OF LAKES

Walk, jog or bike around some of Minneapolis – St. Paul’s most popular lakes. Each of the five bodies of water that encompass the Chain of Lakes byway district has something different to offer: from live music in the summer to family-friendly beaches, rose gardens to bird sanctuaries. Located about five miles southwest of downtown Minneapolis, the Chain of Lakes is open to visitors year round. Access to the lakes is free, but parking and facility rentals may not be. Visit minneapolis.org/visitor/sportsparkstrails/lakes for more information.

GUTHRIE THEATER

Catch a show or take a tour of Guthrie Theater. The downtown theater is one of the nation’s most renowned and one of the city’s most beloved treasures. Opening in 1963, the Guthrie Theater offers a balance of classical theater and avant-garde productions, along with some of the best views of Minneapolis from the banks of the Mississippi River. Visit guthrietheater.org for more information.

MALL OF AMERICA

With more than 500 stores, this is the place to shop till you drop. If you’re not in the mood to shop, the Mall of America is also home to several family-friendly attractions, including an amusement park and the Minnesota Aquarium. Visit mallofamerica.com for more information.

MAYDAY PARADE, CEREMONY AND FESTIVAL

For 39 years, the annual MayDay Parade, Ceremony and Festival has been a vibrant example of art as community building in the Minneapolis – St. Paul area. The MayDay celebration, a program of In the Heart of the Beast Puppet and Mask Theatre, is a day of puppets, music and performance in the street. Join more than 50,000 people from near and far for this day of celebration and community. The parade begins at noon on Sunday, May 1, at 25th Street E. and Bloomington Avenue S., with the ceremony and festival following in Powderhorn Park. Visit hobt.org/mayday for more information.

MINNESOTA TWINS BASEBALL

Check out a baseball game at Target Field. The Minnesota Twins take on the Detroit Tigers on Sunday, May 1, at 1:10 p.m. Visit minnesota.twins.mlb.com for more information and tickets.

SCIENCE MUSEUM OF MINNESOTA

The Science Museum of Minnesota, founded in 1907 and currently located in St. Paul on the banks of the Mississippi River, houses five permanent galleries, rotating exhibits and an IMAX theater. The museum appeals to both adults and children by offering hands-on exhibits, including walking under and around an 82-foot dinosaur in Paleontology Hall and touching a tornado in Experiment Gallery. Visit smm.org for more information.

REGISTRATION is open from 5:00 to 7:00 p.m. in the Nicollet Promenade.

5:00 – 7:00 P.M.

EARLY ARRIVERS HAPPY HOUR

Location: Greenway Promenade (Second Floor)

Start your networking early by joining your fellow conference participants for drinks and conversation. Whether you’re a first-time GEO conference participant or have attended multiple GEO events, this is a great opportunity to connect with your peers and also meet the GEO staff and conference planning and host committees!





Monday May 2

9:00 – 11:30 A.M.

SITE VISITS TO LOCAL NONPROFITS

(Optional. Advance registration and payment are required.)

Space is limited, so reserve your spot early for Site Visits happening on Monday, May 2, and Tuesday, May 3. Please visit the conference registration desk to learn more and to sign up.

Nonprofit Site Visits are a key way to experience a taste of the work being done in the local area. As a participant, you will be able to walk in the shoes of nonprofit leaders, reflect on what you are learning at the conference and hear firsthand how certain grantmaking practices effect these grantees. Learn about the mission, strategies, challenges and accomplishments of some of the leading nonprofits in Minneapolis – St. Paul and the surrounding region. Site Visits are supported by The Jay and Rose Phillips Family Foundation of Minnesota.



S1. Putting Equity in the Driver's Seat: Central Corridor Funders Collaborative

Location: Off-site

In the early 2000s, regional planners announced the construction of the Central Corridor Light Rail line — now known as the Green Line and running 11 miles between the downtowns of Minneapolis and St. Paul. Many community members feared that this project would uproot neighborhoods and destroy small businesses. As momentum behind the Green Line grew, so did efforts to navigate the divides between the public sector, residents, community groups and businesses. In 2007, a group of local and national funders joined forces to establish the **Central Corridor Funders Collaborative**, with a focus on ensuring that neighborhoods, businesses and residents benefited from the light rail transit investment. The Green Line opened in June 2014 and from almost all measures has been a success. Begin the site visit by walking between two station areas that have been the focus of culturally-driven reinvestment in housing, placemaking and community development. Afterward, learn how equity was used as a lens in every aspect of the collaborative's work. This interactive panel will also shine a light on how public-sector partnerships can be a conduit for success.

S2. Improving Impact Through Creative Practices and Placemaking: Pillsbury United Communities

Location: Off-site

Pillsbury United Communities works to create choice, change and connection in underestimated populations across Minneapolis through its network of community centers and social enterprises. In 2014, PUC introduced a new strategic framework, which has garnered national attention and focuses on investing in organizational capacity, developing creative practices (internally) and creative placemaking (externally) across all of PUC's centers to improve impact. After a tour of one of PUC's locations and a 10-block stretch of a south Minneapolis neighborhood that has been transformed by creativity, you will participate in a discussion with representatives from PUC and foundations to explore how their investments allowed for creative practice, design thinking and creative placemaking to catalyze the emergence of several bold, innovative and transformative projects. Grantmakers will learn how these efforts can be used to facilitate sustained organizational change and sustainable impact in the community.

9:30 – 11:30 A.M.

PRE-CONFERENCE WORKSHOPS

(Optional. Advance registration and payment are required.)

🔗 W1. In an Election Season, What Should All Foundations Know About Advocacy?

Session Designer: Christine Reeves Strigaro, Alliance for Justice

Location: Lakeshore C (First Floor)

Does your foundation's mission statement aim for mediocrity and little impact? Of course not! Incorporating high-impact and public policy advocacy strategies may help your organization attain its ambitious mission. With the 2016 presidential election on the horizon, this interactive workshop will help both beginners and advanced philanthropic practitioners dispel and demystify misconceptions about advocacy. Speakers will share the *Philanthropy Advocacy Playbook: Leveraging Your Dollars*, a tool that equips foundation leaders with the confidence to effectively and dually fund and conduct advocacy, in election years and at other times. You will hear from two Minnesota-based grantmaker peers about the advocacy opportunities and challenges they've faced at the state level, an area we too often overlook during national elections. You will gain a deeper understanding of how and why to apply advocacy strategies, as well as what nonprofit advocates most appreciate from foundations.

Speakers:

- Kathy Annette, Blandin Foundation
- Catherine Gray, The Minneapolis Foundation
- Christine Reeves Strigaro, Alliance for Justice

🔗 W2. Mobilizing for Social Change

Session Designer: Emma Jane Bloomfield, Purpose

Location: Mirage (Second Floor)

Over the past decade we've seen public mobilization — including sharing viral content, signing online petitions, contributing new ideas and raising money — be a powerful force for social change. Through a series of case studies and interactive activities led by Purpose, this workshop will explore the positive impact public mobilization can have on society and the critical role grantmakers can play in supporting successful mobilization. You'll learn a set of mobilization tools you can use in your own work — for example, when activating your peers or a group of stakeholders to achieve a shared objective — as well as to support the work of your grantees.

Speakers:

- Emma Bloomfield, Purpose
- Anne Keenan, Purpose

🔗 W3. A New Approach to Collaborative System Change

Session Designer: Richard Evans, EmcArts Inc.

Location: Greenway Ballroom A/J (Second Floor)

Traditional approaches to civic problem solving have not increased the pace of social progress and often reinforce existing power dynamics. Communities need unconventional approaches that bring multiple viewpoints together to discover and develop new ways to intervene systematically, and grantmakers need to know how to support these approaches. In 2015, representatives from city agencies, cultural organizations, nonprofit service providers, artists and business leaders in two cities — Winston-Salem, North Carolina and Providence, Rhode Island — began piloting the Community Innovation Lab framework to help solve systemic challenges around economic inequality and community well-being. One novel feature of the labs is the integration of artists and artistic processes into the change methodologies as a unique way to reframe challenges and explore new thinking. This workshop introduces the five stages of the lab framework and offers a deeper dive into the first stage — a process to recruit and nurture local champions. You will use a framework to identify and explore complex challenges, complete a hands-on activity that demonstrates how to identify champions, and learn about how artists can contribute to the change process. You will have space to reflect on how a similar framework might be co-designed and applied in your community.

Speakers:

- Richard Evans, EmcArts Inc.
- Lynne McCormack, Local Initiatives Support Corporation (LISC)

🌐 W4. Kick-Start Your Conference and Get to Know the GEO Community

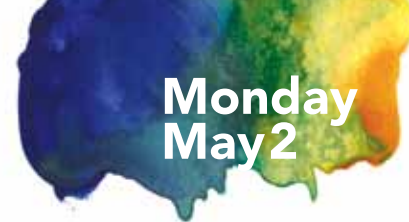
Session Designer: Andrea Wieters, GEO

Location: Regency Room (Second Floor)

GEO is a diverse community of more than 500 grantmaking organizations working to reshape the way philanthropy operates. Where does your organization fit in? Designed with the first-time conference goer and the new-to-GEO attendee in mind, you'll learn about the values and core practices that underscore GEO's work and how we support our members working toward smarter grantmaking, stronger nonprofits and better results. Join this workshop to learn more about the conference program, create your own learning agenda to maximize your overall conference experience, and engage in speed networking to meet like-minded peers and share common questions and challenges you are encountering in your work.

Speakers:

- J McCray, GEO
- Quynh-Anh McMahan, The George Foundation
- Jason Twiss, GEO



LEGEND *More session track info on page 4.*

- COLLABORATING FOR GREATER IMPACT
- LEADING CHANGE IN PHILANTHROPY
- LEARNING FOR IMPROVEMENT
- SUPPORTING NONPROFIT RESILIENCE
- STRENGTHENING RELATIONSHIPS
- NETWORKING

12:00 – 1:45 P.M.

OPENING PLENARY LUNCHEON: CULTURE MATTERS

Location: Nicollet Grand Ballroom (First Floor)

What does it take to build, reinforce or shift culture in philanthropy? And why is it so important that we do so? Join a conversation with three inspiring leaders who are working hard to create and maintain productive foundation cultures. These speakers will share what they have learned about the actions — big and small — that shape culture and will provide examples of what they are doing to consciously reshape their organizational culture to better fit their work. The audience will leave with both a deeper understanding of why culture matters and the inspiration to focus on creating and tending to culture in new and different ways.

Introductory Remarks:



Mae Hong, Rockefeller Philanthropy Advisors

Speakers:



James E. Canales, Barr Foundation



Carrie Pickett-Erway,
Kalamazoo Community Foundation



Sylvia Yee, Evelyn & Walter Haas, Jr. Fund



Kathleen P. Enright, GEO (moderator)

1:45 – 2:15 P.M.

BREAK

In case you haven't already, use this time to register for an Active Hour, Dine Around or Tuesday Site Visit. Please visit the conference registration desk to learn more and to sign up.

2:15 – 3:30 P.M.

BREAKOUT SESSIONS ROUND A

(Select one of 10 options.)

A1. Helping Grantees Build Fundraising Capacity

Session Designer: Rachel Baker, Evelyn & Walter Haas, Jr. Fund

Location: Greenway Ballroom A/J (Second Floor)

Despite best intentions, foundations have not made much progress in building grantee fundraising capacity; fundraising therefore remains a chronic, daunting challenge for most nonprofits. Among small- to mid-size organizations, a strong individual donor program is the exception rather than the rule. *UnderDeveloped*, a 2013 report, documented many of these problems. If we want to promote sustainability and help nonprofits raise the resources they need to achieve their goals, grantmakers need new tools to help grantees strengthen fundraising capacity. In this session, you will learn about new research that profiles organizations with strong individual donor programs and hear from two funder colleagues who are experimenting with new approaches to build fundraising capacity. Later, speakers and participants will break into small groups to discuss these ideas.

Speakers:

- Jeanne Bell, CompassPoint Nonprofit Services
- Rick Moyers, The Eugene and Agnes E. Meyer Foundation
- Linda Wood, Evelyn & Walter Haas, Jr. Fund

A2. Trust Building: Transparency, Triumphs and Tribulations

Session Designer: Rajiv Khanna, International Development Exchange (IDEX)

Location: Greenway Ballroom B/C (Second Floor)

Do you want to build trust across the complex power dynamics created by money? Do you want to ensure that your grantees and constituents have a seat at the table, instead of being just on the menu? Join The Whitman Institute, a funder, and IDEX, its grantee partner and an intermediary that funds global grassroots groups, for a session exploring how funders bring the voices of grantees and community members into direction-setting and decision-making. You will learn what it takes to form partnerships based on respect, mutuality and equity. Speakers will share how they prioritized authentic relationships, aligned their organizational values to this approach and made strategic pivots in their programming to demonstrate trustworthiness. Through a survey activity, you will locate where trust shows up in, or is absent from, your work and identify concrete steps you can take to integrate relationship building as a measure of impact. You will come away with practical tools and tips that can be immediately integrated into your approach, portfolio and programs to help you and your grantees learn and succeed together.

Speakers:

- Rajasvini Bhansali, International Development Exchange (IDEX)
- Pia Infante, The Whitman Institute
- Rajiv Khanna, International Development Exchange (IDEX)

💰 A3. Hoping for Smooth Sailing But Planning for Rough Seas

Session Designer: Maya Winkelstein, Open Road Alliance

Location: Greenway Ballroom D/E (Second Floor)

The world is unpredictable. In business, risk analysis and contingency planning guide savvy investors on whether to invest and how best to ensure success. In philanthropy, however, the question “what can go wrong?” is too often left out of the conversation between funder and grantee. The result? Risk turns into crises and many projects stall or stop. Alternatively, nonprofits push forward on insufficient resources or divert funds to the detriment of efficiency, effectiveness and ultimately impact. This dynamic eats away at nonprofit resiliency and erodes otherwise strong relationships between funders and grantees. In this session, you will learn the importance of collaborative risk mitigation and contingency planning practices. Speakers will share available tools and vocabulary to help funders and grantees evaluate risk and how to plan collaboratively to manage potential crises. Through a case study exercise, you will work in small groups to brainstorm how to craft mitigation plans and respond to emergencies, as well as practice discussing risk with your nonprofit partners without creating fear of losing funding.

Speakers:

- Cristi Hegranes, Global Press Institute
- Laurie Michaels, Open Road Alliance
- Maya Winkelstein, Open Road Alliance

🔗 A4. How to Leverage the Law for Greater Impact

Session Designer: Jared Raynor, TCC Group

Location: Greenway Ballroom F/G (Second Floor)

Do you want to hear firsthand examples from grantmakers and advocates of how supporting legal action as a grantmaker has transformed society? Do you want to learn how you can position support for litigation within a grantmaking portfolio? Do you want to hear the key questions that some of the most experienced grantmakers in the country ask when considering investing in strategic litigation? This session will help both beginner and advanced funders consider how to broaden your toolkit to provide support for pursuing social change through legal means. Funders and evaluators of strategic litigation, along with a nonprofit advocate, will share findings from a national review of legal advocacy work — some of which is specific for grantmakers and some of which can be passed on to grantees. They also will premiere a video showcasing examples and engage participants in a conversation about advantages and disadvantages of strategic litigation from a funder’s perspective, and how and where to start. You will come away with useful information for talking with your board about litigation strategy, structuring these grants and positioning litigation among your organization’s overarching work.

Speakers:

- Baher Azmy, Center for Constitutional Rights
- Annmarie Benedict, The Atlantic Philanthropies
- Jared Raynor, TCC Group

🤝 A5. Funder Collaboration for Policy Change

Session Designer: Denise Mayotte, The Sheltering Arms Foundation

Location: Greenway Ballroom H/I (Second Floor)

Funders working together can be key players in effecting policy change. In this session, you’ll learn how a coalition of more than 27 members of Minnesota’s philanthropic community, working with and supporting a broad and diverse multisector coalition, has secured \$100 million a year in scholarships to support low-income children’s access to high-quality early childhood experiences. The Start Early Funders Coalition is committed to ensuring that all children in Minnesota are fully ready for kindergarten by 2020. Participating grantmakers will share the ins and outs of their partnership. You’ll hear what it took for this large, diverse group to demonstrate a unified voice and statewide leadership on a key area of concern, forge a long-term vision, and develop a shared learning agenda. Participants and speakers will take part in a facilitated “fishbowl” discussion about what makes these kinds of funder collaborations work across a variety of issues and communities. Join the conversation and share your own lessons from working on policy change in a collaborative manner. You’ll come away with ideas and advice from peers across the country to support your own efforts to create legislative and other policy wins locally.

Speakers:

- Frank Forsberg, Greater Twin Cities United Way
- Trista Harris, Minnesota Council on Foundations
- Denise Mayotte, The Sheltering Arms Foundation

🏠 A6. Responsive Neighborhood Investment Amid Police Conflict and Community Upheaval

Session Designer: Leah Hendey, Urban Institute

Location: Regency Room (Second Floor)

The recent police relations and community upheaval in Baltimore highlight how deeply interactions with the criminal justice system affect the experiences and opportunities of residents in distressed neighborhoods — residents who are disproportionately people of color. Grantmakers need to understand these dynamics when undertaking revitalization efforts, particularly where residents experience poor physical conditions, face social challenges and have disproportionate police contact. In this session, speakers will share lessons from efforts to use research and data to address structural inequity and to incorporate resident voices, including making information more accessible and involving residents in the design, implementation and use of evaluation. Examples will be drawn from East Baltimore and other communities funded through the Byrne Criminal Justice Innovation program, which is intended to support solutions that go beyond criminal justice reform to comprehensive and sustained investment in neighborhoods. In group discussions, you will gain a deeper understanding of how research and data can be used to empower communities and residents in local revitalization processes. You will also come away with ideas adaptable to your own situation.







Speakers:

- Seema Iyer, Baltimore Neighborhood Indicators Alliance – The Jacob France Institute
- Matthew Perkins, Local Initiatives Support Corporation (LISC)
- Kimberly Spring, The Annie E. Casey Foundation



Monday
May 2

LEGEND *More session track info on page 4.*

-  COLLABORATING FOR GREATER IMPACT
-  LEADING CHANGE IN PHILANTHROPY
-  LEARNING FOR IMPROVEMENT
-  SUPPORTING NONPROFIT RESILIENCE
-  STRENGTHENING RELATIONSHIPS
-  NETWORKING

A7. Harmonizing Strategy and Learning

Session Designer: Marilyn Darling, Fourth Quadrant Partners

Location: Mirage (Second Floor)

Strategy and learning are not as different as they are sometimes treated. By engaging its members in a structured learning process as an integral component of an overall evaluation approach, a funder collaborative can enhance the quality of learning and its usefulness for improving strategy, collaboration, alignment and ultimately, impact. Speakers will offer insights from ClimateWorks and funders collaborating on climate action, who have used Emergent Learning tools to strengthen both strategy and learning across organizations and geographies. This approach has helped funders bring their best collective thinking forward and more efficiently test and adjust their strategy. You will receive handouts with practical examples of tools you can use to create a learning community with co-funders and other partners. You also will have the opportunity to engage with ClimateWorks and reflect with peers on their own thinking about the link between strategy and learning.

Speakers:

- Ann Cleaveland, ClimateWorks Foundation
- Marilyn Darling, Fourth Quadrant Partners
- Tim Larson, Ross Strategic

A8. Supporting Capacity Building Through Crowdsourcing

Session Designer: Marianne Philbin, Pierce Family Foundation

Location: Skyway A/B (Second Floor)

There are more ways than traditional grants to support capacity building, field building and collaboration. Sometimes what grantees want (and need) is not a workshop or a consultant but a chance to sit down with a peer who has specific experience related to an issue they might be trying to tackle. This session introduces the Peer Skill Share program, created in Chicago in 2010, which now involves 15 foundation partners and 700 nonprofit leaders sharing expertise — building the capacity of individual nonprofit employees and, by extension, the capacity of their organizations and the entire local nonprofit sector. Funders of the program will briefly outline the how-to logistics and answer questions about implementation. A grantee in the skill-sharing pool will share what nonprofits value about it, including that participation has led to more highly skilled personnel and stronger networks. To bring to life how this model could work in your community, you will take part in a rapid-fire, live-peer skill share. In doing so, you will get a taste of the enormous peer expertise present at the conference.

Speakers:

- Heather Parish, Pierce Family Foundation
- Marianne Philbin, Pierce Family Foundation
- Ellen Ray, Center for Changing Lives

A9. Advancing Racial Equity and Inclusion Through System Leadership

Session Designers: Robert Albright and Paul Schmitz, Collective Impact Forum

Location: Lakeshore A (First Floor)

Many of the problems we seek to address can't be solved by continuing to do what we're doing — structural inequities and large-scale social change require a new approach. Especially as we look to make progress toward advancing racial equity and inclusion, we need to take a wider-lens approach to our work by seeking to understand the systems we want to affect and finding new ways to collaborate. This kind of collaborative problem solving requires a different set of leadership skills — including the abilities to see the larger system, foster reflection and more generative conversations, and shift the collective focus from reactive problem solving to co-creating proactive solutions. Join this session to engage in an interactive activity to explore core capabilities necessary to advance equity and inclusion through system leadership. Speakers will discuss how to develop these skills in yourself and among your grantees. Participants will engage in a “fishbowl” dialogue with two system leaders who have incorporated systems leadership at the core of their racial equity and inclusion work.

Speakers:

- Tawanna Black, Northside Funders Group
- Stacy Holland, The Lenfest Foundation
- Paul Schmitz, Collective Impact Forum (moderator)

A10. Grantee Inclusion? Am I Included? Navigating Power Dynamics and Relationships for More Inclusive Grantmaking

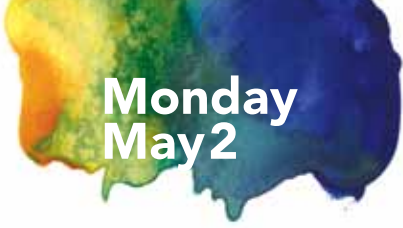
Session Designer: Lori Bartczak, GEO

Location: Lakeshore B/C (First Floor)

When thinking about grantee inclusion, it can be easy to overlook some of the dynamics at play inside grantmaking organizations and how these dynamics impact our ability to develop authentic relationships with grantees. A key insight from GEO's Change Incubator so far is that armed with the knowledge of systems, chutzpah, teamwork and elbow grease, the individual participants have more power and agency than they may have recognized initially. In this session, two Change Incubator participants will share insights they've had about their role in advancing changes in their organizations to bring a greater grantee voice into the work, times they've recognized they were getting in their own way, risks they've taken and — because the work of relationships is always ongoing — challenges that lie ahead. Participants will also experiment with a framework to help reflect on challenges in their own work in a new way.

Speakers:

- Lori Bartczak, GEO
- Justin Laing, The Heinz Endowments
- Alexandra Nolen, Episcopal Health Foundation



Monday
May 2

4:00 – 5:00 P.M.

ACTIVE HOUR

Join an Active Hour activity to decompress, renew your energy, explore the area and make connections. Advance registration is required, and space is limited. Please visit the conference registration desk to learn more and to sign up. Active Hours are supported by the George Family Foundation.

5:30 – 7:30 P.M.

WELCOME RECEPTION AT ORCHESTRA HALL

GEO and the conference host committee welcome you to Minneapolis – St. Paul! To kick off the 2016 National Conference, please join us for an evening of networking, cocktails, food and entertainment.

The reception will be held at Orchestra Hall, home of the Minnesota Orchestra. One of Minnesota’s cultural and architectural touchstones, Orchestra Hall opened in 1974 and since then has drawn upward of 10 million people to its concerts.

This backdrop provides a great opportunity to see, hear and learn more about Minneapolis – St. Paul and its vibrant arts scene, including visual art, music, theater, dance, literature and others.

During the reception, hear live performances by Buckets and Tap Shoes, a high-energy group of dance and percussion artists who have performed internationally and in more than 30 U.S. states, and immerse yourself in a “Chalk Talk” with award-winning photographer Wing Young Huie.

To get to the reception, exit the hotel, turn left and walk two blocks north on Nicollet Mall to South 11th Street. Orchestra Hall will be on your right.

Don’t forget to wear your name badge! Only conference participants and their preregistered guests will be allowed to enter.



REFLECTIONS FROM DAY 1

During the conference, I am seeking peer input on:

Something that is sticking with me from today is:

because:

Don’t want to forget!

My Site Visit selection:

My Dine Around details:

A Salon conversation I plan to check out:

My ambassador(s)/ ambassadee(s) is:

Email:

Cell:

We’re going to meet at:



Tuesday May 3

6:30 – 7:30 A.M.

ACTIVE HOUR

Join an Active Hour activity to get energized for the day. Advance registration is required, and space is limited. Please visit the conference registration desk to learn more and to sign up.

8:00 – 9:00 A.M.

NETWORKING BREAKFAST

Location: Nicollet Grand Ballroom (First Floor)

Enjoy a breakfast buffet as you network with conference participants and carry on the conversation from the previous day's sessions. There are also a number of peer-hosted roundtable discussions and a Salon conversation happening during this time; log in to the conference app for more information.



9:15 – 11:00 A.M.

SHORT TALKS

Short Talks are designed to share provocative ideas and unique perspectives from thought leaders both within and outside philanthropy. Join up to three Short Talks by selecting one speaker during each of the three rounds. If you are struggling to make a selection, know that the Short Talks will be recorded for online viewing following the conference.

There will be a short break between each talk to allow you time to make your next selection and change rooms, if necessary. There is no Q&A allowed during Short Talks, but following the last (third) round of talks, each speaker will pair up with a moderator for a discussion with the audience — so hold onto your questions!

Regency Room (Second Floor)	Greenway Ballroom F/G (Second Floor)	Mirage (Second Floor)
ROUND 1: 9:15 – 9:40 A.M.		
1A. Vu Le, Rainier Valley Corps and Nonprofit With Balls	1B. Frank Mirabal, City of Albuquerque	1C. MayKao Y. Hang, Amherst H. Wilder Foundation
ROUND 2: 9:55 – 10:20 A.M.		
2A. Laura Zabel, Springboard for the Arts	2B. Isaiah Oliver, Community Foundation of Greater Flint	2C. Deepak Bhargava, Center for Community Change
ROUND 3: 10:35 – 11:00 A.M.		
3A. Sunny Grosso, Delivering Happiness	3B. Alicia Garza, National Domestic Workers Alliance and the Black Lives Matter network	3C. Aaron Hurst, Imperative

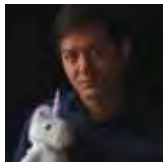


Tuesday
May 3

9:15 – 9:40 A.M.

ROUND 1 TALKS

1A. Want to Support Communities of Color? Stop Trickle-Down Community Engagement



Vu Le, Rainier Valley Corps and *Nonprofit With Balls*
Location: Regency Room (Second Floor)

As issues around diversity, equity, inclusion and cultural competency have risen to the forefront, many grantmakers are trying to make their processes more equitable, both in terms of dollars awarded and in who receives the money. But, from the perspective of grassroots organizations led by and serving communities of color, common foundation and nonprofit practices can feel disingenuous and even counterproductive to this goal. If grantmakers want marginalized communities to be engaged, they need to fund, trust and support them directly, believes Vu Le. This means resisting the tendency to practice “trickle-down community engagement.” Le will speak candidly about this and other well-intentioned but harmful behaviors in the sector. He’ll suggest ways to make funding more accessible, lift up individuals and communities of color, and demonstrate trust that communities have solutions.

1B. Collaborating Across Sectors to Build Better Lives for Immigrants



Frank Mirabal, City of Albuquerque
Location: Greenway Ballroom F/G (Second Floor)

If you talk with immigrants, you will hear a common theme: we want a better life for our children and our families. As our nation continues to climb out of the Great Recession, public and private leaders are partnering on new approaches to bring economic prosperity within reach of all residents, regardless of race, income, gender or country of origin. Where do community members fit into these strategies and how can the social sector involve beneficiaries authentically? Frank Mirabal will tell the story of Albuquerque, New Mexico, where city administrators and cross-sector partners are engaging a historically marginalized population in efforts to increase economic opportunity. He’ll explore challenges and opportunities in implementing solutions that are actually informed by immigrants’ experiences, not “top-down.”

1C. Here for Good



MayKao Y. Hang, Amherst H. Wilder Foundation
Location: Mirage (Second Floor)

Driven by a desire to make lasting contributions, grantmakers face a temptation to jump on the latest bandwagon, which often results in changing our focus, reinventing strategy and leaving nonprofits in the lurch. At the Amherst H. Wilder Foundation, an operating foundation with more than a century of experience working in greater St. Paul, MayKao Y. Hang and her team are taking a different approach. By applying a longer-term, multigenerational and systems-thinking lens to its work, Wilder Foundation seeks to be more responsive and effective in understanding what actually makes people and communities stronger and more vibrant. Speaking from her vantage point as both an operator of direct service programs in the Twin Cities that benefit everyone from preschoolers to the elderly, as well as a funder in the community, Hang will share what is truly required of us to change often complex systems.

9:55 – 10:20 A.M.

ROUND 2 TALKS

2A. Place-Based Change Requires Supporting Creative Leaders



Laura Zabel, Springboard for the Arts
Location: Regency Room (Second Floor)

Effective place-based change must be rooted in broad and diverse citizen power; thus every community needs a steady supply of residents, artists and other leaders with the capacity and agency to have a positive impact. To nurture this talent, we need to look beyond, or behind, the usual suspects and invite more people to the table to help neighborhoods thrive. Doing this requires both grantmakers and nonprofits to work in a hyperlocal way, building more leadership that is truly from and of the communities we hope to serve. Drawing on the work of Springboard for the Arts, which puts artists and artistic process at the heart of place-based problem solving, Laura Zabel will provide practical examples from Minnesota and beyond for finding and supporting new community leaders and sparking creative change.

2B. Philanthropy’s Role in Times of Crisis



Isaiah Oliver, Community Foundation of Greater Flint
Location: Greenway Ballroom F/G (Second Floor)

At our best, grantmakers are connected and connectors, resourced and resourceful. These traits allow us to play crucial roles in moments of uncertainty by being attentive to short- and long-term needs, leveraging our relationships to align other philanthropic sources and sectors, serving as a convener and, hopefully, emerging as a trusted community partner and advocate. Isaiah Oliver, a grantmaker born and raised in Flint, Michigan, will talk about how the local funding community is responding to the current water crisis in Flint and the work still to come. He’ll share lessons learned from the frontlines and board room, where staff are changing the way they think about transparency in their work and their role in the region as they plan for the future. He’ll offer advice applicable to any grantmaker about key roles we can play in emergent, controversial or complex issues facing our communities.

2C. Let’s Rewrite the Social Contract Between Grantmakers and Grantees



Deepak Bhargava, Center for Community Change
Location: Mirage (Second Floor)

Grantmaker-grantee interactions have many spoken and unspoken rules. The hidden inner workings of the relationships between funders and nonprofits can have a great impact on the outcomes both parties are trying to achieve. Drawing on 25 years of observing how major social changes happen, particularly in the areas of economic and racial justice and immigration reform, Deepak Bhargava will speak truthfully about his awe-inspiring best and chillingly worst experiences with philanthropy. He’ll argue that for grantmakers to be relevant partners in social change, the implicit social contract between funders and grantees needs to be fundamentally rewritten. What could new working agreements and relationships look like? Bhargava will put forward some uncomfortable changes needed for the social sector to reach its full potential, as well as point to positive shifts already underway.

10:35 – 11:00 A.M.

ROUND 3 TALKS

3A. Culture by Design and the Unexpected Role of Happiness



Sunny Grosso, Delivering Happiness

Location: Regency Room (Second Floor)

Internal culture can improve or impede effective work. No matter the type of organization or sector, culture develops whether or not staff spend any time thinking about it; but positive, enduring culture only happens by regularly and consistently working on it. Sunny Grosso helps leaders create more successful organizations by defining and living their unique culture internally and tapping into the unexpected role of happiness in their work. Grosso will explain why organizations are now prioritizing culture, common mistakes made in a rush to define workplace culture and what an authentic culture by design is all about. She'll share examples from companies like Zappos that are leading the way in intentionally building culture and offer key actions that you can apply immediately to start tending to your organization's culture and values.

3B. Turning Moments Into Movements



Alicia Garza, National Domestic Workers Alliance and the Black Lives Matter network

Location: Greenway Ballroom F/G (Second Floor)

Black Lives Matter has brought striking issues of violence, human rights and racial equity into the national spotlight. Many grantmakers recognize the role of social movements in advancing justice for marginalized people, and are making a shift from solely supporting individual nonprofits to supporting intersecting networks and movements. Some grantmakers are also making explicit commitments to address racism and inequity. But in the fast-moving age of digital media and citizen-led efforts, is traditional philanthropy — with our cumbersome applications, program siloes and lengthy approval cycles — able to keep up and be helpful? Alicia Garza, co-creator of the Black Lives Matter network, will address strategies that grantmakers are using and can use to address the issues of power and privilege that are inherent in our funding practices.

3C. The Purpose Gap



Aaron Hurst, Imperative

Location: Mirage (Second Floor)

Ask any grantmaker about the distinguishing characteristics of strong organizations, and the conversation inevitably will turn to leadership. Finding and keeping good people, including board members, staff and volunteers, is no accident. Much effort is put into getting the right people into the right positions and retaining them. What if there was a clearly defining characteristic that would help you identify high-achievers who see their work as a way to help others and as a way to grow personally? Aaron Hurst believes there is — "purpose." Hurst will introduce new research on purpose-driven people that has the potential to disrupt the talent strategies of many organizations, including philanthropy, and change our discourse about education, work and success. He'll leave you thinking differently about the drivers of our workplace culture and what defines effective organizations.

11:15 A.M. – 12:00 P.M.

MODERATED Q&A WITH SHORT TALK SPEAKERS

Do you have questions for or want to hear more from a Short Talk speaker who gave a thought-provoking presentation that piqued your interest? Join a moderated Q&A session, where a Short Talk speaker will answer your questions and delve deeper into the ideas presented earlier.

1A	Vu Le, Rainier Valley Corps and Nonprofit With Balls <i>Jeff Kutash, Peter Kiewit Foundation (moderator)</i>	<i>Lakeshore B/C (First Floor)</i>
1B	Frank Mirabal, City of Albuquerque <i>Kate Shirah, John Rex Endowment (moderator)</i>	<i>Greenway Ballroom A/J (Second Floor)</i>
1C	MayKao Y. Hang, Amherst H. Wilder Foundation <i>Lori Bartczak, GEO (moderator)</i>	<i>Greenway Ballroom B/C (Second Floor)</i>
2A	Laura Zabel, Springboard for the Arts <i>Jessica Bearman, Bearman Consulting (moderator)</i>	<i>Skyway A/B (Second Floor)</i>
2B	Isaiah Oliver, Community Foundation of Greater Flint <i>Meghan Duffy, GEO (moderator)</i>	<i>Greenway Ballroom H/I (Second Floor)</i>
2C	Deepak Bhargava, Center for Community Change <i>Grace Hou, Woods Fund Chicago (moderator)</i>	<i>Lakeshore A (First Floor)</i>
3A	Sunny Grosso, Delivering Happiness <i>Ted Chen, Margaret A. Cargill Philanthropies (moderator)</i>	<i>Regency Room (Second Floor)</i>
3B	Alicia Garza, National Domestic Workers Alliance and the Black Lives Matter network <i>Justin Laing, The Heinz Endowments (moderator)</i>	<i>Greenway Ballroom F/G (Second Floor)</i>
3C	Aaron Hurst, Imperative <i>Lindsay Louie, The William and Flora Hewlett Foundation (moderator)</i>	<i>Mirage (Second Floor)</i>



12:15 – 1:45 P.M.

**PLENARY LUNCHEON:
EQUITY AS AN EFFECTIVENESS IMPERATIVE**

Location: Nicollet Grand Ballroom (First Floor)

It seems more grantmakers recognize that the progress they seek to make on issues is directly linked to inequities in their communities — in other words, there is a clear link between equity and effectiveness. A range of organizations, including the W.K. Kellogg Foundation and the Executives’ Alliance to Expand Opportunities for Boys and Men of Color have quantified the economic impact of racial disparities. But many questions remain. What role can grantmakers best play to address inequities in their communities? Where might we have blind spots? How can we make the case to others? This panel will provide a range of perspectives to help give grantmakers guidance on how to have tough conversations and identify helpful roles grantmakers can play to help make progress in their communities.

Introductory Remarks:



Trista Harris, Minnesota Council on Foundations

Speakers:



Peggy Flanagan, Minnesota State House of Representatives



Michael McAfee, Promise Neighborhoods Institute at PolicyLink



Doug Stamm, Meyer Memorial Trust









Starsky Wilson, Deaconess Foundation (MO) (moderator)

1:45 – 2:15 P.M.

BREAK

Grab an afternoon coffee or pick-me-up snack.

-  COLLABORATING FOR GREATER IMPACT
-  LEADING CHANGE IN PHILANTHROPY
-  LEARNING FOR IMPROVEMENT
-  SUPPORTING NONPROFIT RESILIENCE
-  STRENGTHENING RELATIONSHIPS
-  NETWORKING



2:15 – 3:30 P.M.

BREAKOUT SESSIONS ROUND B

(Select one of 10 options.)

 **B1. Building Internal Culture to Achieve External Results**

Session Designer: Rachel Mosher-Williams, Community Wealth Partners

Location: Lakeshore A (First Floor)

Grantmakers increasingly seek to be more transparent and collaborative, as well as to have greater impact with their grantees. They are also anxious about recruiting and retaining the best talent as they navigate the retirement of baby boomers and the emerging leadership of millennials. Amid these changes, funders have an opportunity to intentionally build and reinforce an internal culture that promotes values, norms and daily behaviors that create the conditions for transformational change in their work. More than periodic team-building exercises, culture is how people work together every day and the (often unspoken) rules about acceptable actions. This session will help you understand how explicitly focusing on internal culture makes achieving external change for your organization, grantees and communities more likely. Speakers who have worked hard to build and maintain a “change-making” internal culture will introduce a framework for culture building and share advice, challenges and outcomes of their efforts. Through a small-group exercise, you will assess your current organizational culture and what might be needed to create better conditions for transformational change both in your organization and with grantees.

Speakers:

- Sara Brenner, Community Wealth Partners
- John Esterle, The Whitman Institute
- Laura Weidman Powers, CODE2040

 **B2. Real Cost. Real Outcomes. What Funders Need to Know**

Session Designer: David Greco, Social Sector Partners

Location: Lakeshore B/C (First Floor)

Philanthropy cannot respond to the profound shifts affecting the social sector by continuing business as usual. Accordingly, grantmakers are examining their practices and looking to develop new funding strategies in order to help their grantees increase impact. Last year, a collaboration of funders and regional associations of grantmakers in California launched the Real Cost Project to explore what it would take for funders to adopt grantmaking practices based on what it really costs nonprofits to deliver social outcomes, including their direct programmatic expenses but also the capacity and capital needs of their organizations. Join this session if you want to learn more about helping nonprofits deliver on mission and be sustainable over the long term, seeking a different way to engage with your grantees and a means to better use limited resources. Speakers in this session will share lessons learned and recommendations emerging from the Real Cost Project, and you will leave with tools and resources developed to support grantmakers making the transition to real-cost funding.

Speakers:

- Linda Baker, The David and Lucile Packard Foundation
- David Greco, Social Sector Partners
- Ellen LaPointe, Northern California Grantmakers

 **B3. Supporting Beneficiary Feedback Loops**

Session Designer: Melinda Tuan, Fund for Shared Insight

Location: Greenway Ballroom A/J (Second Floor)

Does your foundation support grantees that do direct service work? Have you considered asking for beneficiary feedback and thought, “That sounds great in theory, but what am I supposed to do to in practice to support feedback loops?” Do you want to hear the relatively simple steps that some nonprofits have taken to collect and use feedback from the people they serve? If your answer to any of these questions is “Yes!” then join this session. Speakers, including a core supporter of the Fund for Shared Insight and two participating grantees, will explain how they’ve built a practice of listening and started collecting beneficiary feedback, discuss what was easy and hard in the process, and share key lessons learned. In small groups, you’ll share hurdles your organization or grantees face in making feedback a regular occurrence and then come together to brainstorm real-time suggestions from speakers and peers to devise possible solutions to these barriers. You will leave with ideas for fostering more openness between and among foundations and grantees and how to get started in this work.

Speakers:

- Arelis Diaz, W.K. Kellogg Foundation
- Tess Reynolds, New Door Ventures
- Sam Schaeffer, Center for Employment Opportunities

 **B4. New Frameworks for Measuring Capacity and Assessing Performance**

Session Designer: Julie Simpson, TCC Group

Location: Greenway Ballroom B/C (Second Floor)

If we start with the assumption that — in order to improve our social sector as a whole — those who do the work to strengthen our communities (the nonprofits) are equally as critical as those responsible for providing the resources for the work to get done (the foundations), then why wouldn’t we expect all social sector actors to build their capacity? How do we know when our grantees and our foundations are becoming more effective and impactful as a result of our capacity investments, organizational development efforts and technical assistance? What does a high performing organization or foundation look like? And can we measure that? This session will review and demonstrate existing resources for assessing nonprofit and foundation capacity and effectiveness. Speakers will introduce the pros and cons of a variety of rubrics in use in the field and offer guidance on how funders decide on the right fit for the desired purpose. In small groups, you will interpret an organizational assessment to target and prioritize the capacities to be built, and become familiar with the Leap of Reason’s new Performance Imperative Pillar Assessment. You will also hear directly from grantmaker peers who have used different frameworks and tools to assess individual nonprofits and grantee cohorts. You will leave the session with increased awareness of the importance of the facilitator’s role in interpreting data gleaned from assessments and of the data collection methods most appropriate for your organization. Finally, you will learn about initial next steps for selecting the appropriate assessment agenda for your organization and your grantees.

Speakers:

- Julie Simpson, TCC Group
- Tyrone Spann, Foundations of East Chicago
- Mary Kopczynski Winkler, Urban Institute Center on Nonprofits and Philanthropy

B5. Better Funder Collaboration Yields Greater Grantee Collaboration

Session Designer: Alejandra Ibañez, Woods Fund Chicago

Location: Greenway Ballroom D/E (Second Floor)

This session will demonstrate the benefits of deep funder collaboration and highlight how it can catalyze greater grantee collaboration. It will tell the story of the Chicagoland Workforce Funder Alliance, a funder collaborative focused on employment and the rights of low-wage workers; and the Raise the Floor Alliance, a first-in-the-nation collaboration of worker centers. As the funder collaborative grew from five contributors to 15 in three years, it was able to invest in the collective capacity of RFA's members to collect data and track issues to demonstrate the need for policy change, build public support with compelling communications, and advocate for workers' rights through litigation. Funders and grantee speakers will explain how the positive effects of this two-pronged collaboration would not have been possible if individual grantmakers in the region had continued to go it alone. No matter the model of collaboration you pursue, join this session to dive deeper into how grantmakers build stronger relationships with peer funders, help align multiple actors around shared goals and mitigate the challenges inherent in foundation support for nonprofit collaboration.

Speakers:

- Matthew Bruce, Chicagoland Workforce Funder Alliance
- Alejandra Ibañez, Woods Fund Chicago
- Sophia Zaman, Raise the Floor Alliance

B6. From Scarcity and Competitiveness to Abundance and Collaboration

Session Designer: Lucia Corral Peña, Blue Shield of California Foundation

Location: Greenway Ballroom F/G (Second Floor)

Despite reductions in statewide public funding and a culture of competition, this session will highlight a network of nonprofit leaders and organizations inspired to work together to strengthen their field, build alliances and broaden the domestic violence movement. Staff and grantees of Blue Shield of California Foundation's Strong Field Project will share their stories and offer lessons on how funders more effectively invest in the capacity of nonprofit leaders to work together to advance common goals. Throughout the four-year project, grantees diversified their leadership pipelines, forged a network that resulted in decreased fragmentation and better services, and spurred a fieldwide culture shift. If you support capacity building, networks or other partnerships, join this session to discuss the role of leadership development in field building and how funders can more intentionally engage grantees and others to shape the course of our work, deepen relationships and boost collaboration.

Speakers:

- Beckie Masaki, Asian Pacific Institute on Gender-Based Violence
- Lucia Corral Peña, Blue Shield of California Foundation
- Sharon Turner, STAND! For Families Free of Violence

B7. How Does Your Approach to Evaluation Measure Up?

Session Designer: Julia Coffman, Center for Evaluation Innovation

Location: Greenway Ballroom H/I (Second Floor)

Join this session to see how your foundation's approach to evaluation and learning stacks up against your peers. Where should responsibility for evaluation be positioned in the organization? What should the foundation be asking of program staff and grantees in terms of evaluation and learning? The Center for Evaluation Innovation and Center for Effective Philanthropy partnered to conduct new benchmarking research to help you answer these burning questions and many others. Grouped with your like-minded peers, you will dig into what this research reveals about current and cutting-edge evaluation and learning practices in philanthropy, how it compares to your own organization's approaches, and how to ensure your evaluation function and practices are a good "fit" with your foundation's size, values and culture.

Speakers:

- Tanya Beer, Center for Evaluation Innovation
- Phil Buchanan, The Center for Effective Philanthropy
- Julia Coffman, Center for Evaluation Innovation
- Jennifer Glickman, The Center for Effective Philanthropy

B8. Walking the Talk of Diversity, Equity and Inclusion From the Inside Out

Session Designer: Hanh Cao Yu, Social Policy Research Associates

Location: Regency Room (Second Floor)

"We know that better data leads to greater effectiveness, and demographic data is crucial to understanding the impact of any philanthropic intervention," says the D5 Coalition. "But collecting data about these issues requires not just insight but resolve, because the challenge requires us to ask questions — and hear answers — that may make us think differently, act differently, and lead differently and, perhaps, more courageously." Using The California Endowment as a case study, this interactive session will explore how grantmakers stay accountable to our stated visions of diversity, equity and inclusion. Speakers will explain why TCE collected diversity data, how they used the information, and how they engaged board members, staff and community partners around the data to meaningfully advance health and racial equity. They also will present a framework that others can use to benchmark organizational progress. You will be asked to reflect on your own organization's readiness to have conversations about diversity, equity and inclusion and engage in deep self-examination. Bring your questions and come ready to share with peers your experiences, successes, roadblocks and advice in moving from diversity to equity and inclusion.

Speakers:

- Kelly Brown, D5 Coalition
- Mona Jhawar, The California Endowment
- Hanh Cao Yu, Social Policy Research Associates

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Tuesday
May 3

💰 B9. Adventures in Mixing For-Profit Investment With Philanthropy

Session Designer: Justin Oliver, Gary Community Investments

Location: Skyway A/B (Second Floor)

How can an impact investing perspective help traditional grantmakers be more effective at achieving our missions? How and why would a funder transition to impact investing? What options are open to grantmakers seeking to test the waters? This session will explore how grantmakers optimize impact by aligning our philanthropy with investment, both philosophically and practically. During a series of fast-paced, small-group conversations, you will consider how to expand your portfolios to best address social issues. Speakers will discuss challenges learned from combining philanthropic and for-profit investments, including the appropriate situations for various structures of capital. Through group discussion, you will be challenged collegially to consider how and why aligning for-profit investments and grant funding under one roof may or may not maximize your organization's social impact.

Speakers:

- Andrea Armeni, Transform Finance
- Luis Duarte, Gary Community Investments
- Justin Oliver, Gary Community Investments

🤝 B10. A Values-Based Approach to Next-Generation Philanthropy

Session Designer: Sharna Goldseker, 21/64

Location: Mirage (Second Floor)

In order to maximize impact and cultivate strong relationships with grantees, grantmakers must establish their own values-driven philanthropic identity. This often presents unique challenges for family foundations seeking to define multigenerational engagement. To lead and govern these organizations, family members must learn how to work together around the philanthropic table simultaneously rather than passing the baton, thus challenging parents and children, grandparents and grandchildren, to become peers in decision-making. If your organization is working across multiple generations, join this session to explore how governance evolves, how families honor donor intent while making room for members with new ideas, how values remain intact as the mission changes to respond to present-day needs, and how family members build understanding and awareness to work productively together as a team. You will hear a peer share how her family's foundation has opened up board voice and trustee leadership to next-generation family members. Through a series of interactive exercises you also will explore your own set of values and how they inform decision-making processes and can be used to strengthen relationships.

Speakers:

- Sharna Goldseker, 21/64
- Robyn Schein, The Minneapolis Foundation

3:30 – 4:00 P.M.

BREAK

Grab an afternoon coffee or pick-me-up snack.



3:45 – 6:15 P.M.

SITE VISITS TO LOCAL NONPROFITS

(Optional. Advance registration and payment are required.)

Space is limited, so reserve your spot early. Please visit the conference registration desk to learn more and to sign up.



S3. How Strong Relationships Fuel Nonprofit Innovation: Second Harvest Heartland

Location: Off-site

Second Harvest Heartland's multi-faceted relationship with the General Mills Foundation is an example of how a shared value of collaboration and trust led to a robust partnership that's helped this Minnesota-based food bank grow to become a nationally recognized innovator and change maker in food security. After a tour of SHH's facility, participate in a discussion with representatives from Second Harvest, General Mills, Travelers Foundation and College Possible, a nonprofit that is making college admission and success possible for low-income students through an intensive curriculum of coaching and support. The panelists will discuss the conditions that are needed for partnerships to expand beyond the annual grant and for nonprofits to gain the flexibility they need to drive the innovation and outcomes funders seek.

S4. Closing the Gap to Sustainability: Northside Achievement Zone







Location: Off-site

Four years ago, **Northside Achievement Zone**, a nonprofit dedicated to permanently closing the achievement gap and ending generational poverty in north Minneapolis, received a transformational \$28 million Promise Neighborhood's implementation grant from the U.S. Department of Education. While the funding enabled NAZ to scale their work significantly, it also required them to think critically about how they would continue expanded services once the grant ended. After a historical tour of the Northside, learn how NAZ integrated sustainability planning from the start and what they are doing to close the gap after their federal funding ends later this year. This interactive discussion with representatives from NAZ and their philanthropic partners will focus on the many roles philanthropy, government and the business community play in supporting nonprofit sustainability and scalability.

S5. Collaborative Solutions in the Twin Cities' Somali Community: People's Center Health Services

Location: Off-site

How do grantmakers best support collaboration among nonprofits and other funders to maximize impact? The Twin Cities is home to the largest Somali population in the United States, and the philanthropic community has supported integrated support services, such as training, housing and health care, to serve the needs of Somali residents. A key player in this success is the **People's Center Health Services**, which has been providing culturally competent health care services in the Cedar-Riverside community for more than 45 years. After a tour of the historic Cedar-Riverside/West Bank neighborhood of Minneapolis, join PCHS and representatives from the local philanthropic community for a discussion about how grantmakers can engage community stakeholders to develop innovative and integrated solutions.

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4:00 – 5:15 P.M.

BREAKOUT SESSIONS ROUND C

(Select one of 10 options.)

C1. How Can Foundation Boards Reach Their Peak Potential? (Trustees Only)

Session Designer: Kristen Scott Kennedy, GEO

Location: Lakeshore A (First Floor)

What does it take for foundation boards to be at their best? And how is that connected to the foundation's performance overall? In a guided peer-to-peer conversation, Carrie Avery (board president of the Durfee Foundation) and Kathleen Enright (president and CEO of GEO) will help foundation trustees think deeply about their role and talk through the insights they may need to generate or the muscles they may need to build in order to perform at their best. Participating trustees will benefit from insights from several years of national work and have the opportunity to engage in small group discussions with fellow trustees around areas of shared interest.

Speakers:

- Carrie Avery, The Durfee Foundation
- Kathleen P. Enright, GEO

C2. The Skills to Pay the Bills

Session Designers: Andrew Schwalm, Fiscal Management Associates, and Polly Singh, The Wallace Foundation

Location: Skyway A/B (Second Floor)

Sound financial management skills are critical for nonprofits that deliver high-quality services in any community. But can funders help build financial management skills of their grantees, and if so, how? The Wallace Foundation set out to answer these questions with its Strategic Financial Management initiative, offering financial management training to two groups of nonprofits in Chicago. A new outside evaluation by MDRC and Child Trends demonstrates positive outcomes in both groups and suggests some lessons learned. This session will share lessons and best practices from the initiative and present three "tiers" of investment participants might consider to improve nonprofit financial management in other communities. You will leave with an increased understanding of the forms of support nonprofits want and need most to strengthen their ability to manage their resources and increase their potential to achieve results.

Speakers:

- Hilda Polanco, Fiscal Management Associates
- Polly Singh, The Wallace Foundation
- Karen Walker, Child Trends

C3. From Ideas to Actions: Managing Implementation to Achieve Results

Session Designer: Lauren Kurczewski, U.S. Education Delivery Institute

Location: Greenway Ballroom A/J (Second Floor)

Both foundations and nonprofits excel at designing initiatives, but poor implementation often puts much of our good work at risk. It doesn't have to be this way — good implementation is a discipline that anyone can learn. In this session, speakers, including a technical assistance provider and a peer funder, will introduce the "delivery methodology," a proven approach that offers practical tools for managing implementation. Speakers will share real-life examples, both from philanthropy and nonprofits, of how the methodology can be used to drive continuous improvement and learning. You will have a chance to discuss some of the implementation challenges that your organization and your grantees face and then practice using a few tools of the delivery approach that can be easily applied in your day-to-day work.

Speakers:

- Tom Kelly, Hawai'i Community Foundation
- Lauren Kurczewski, U.S. Education Delivery Institute

C4. Enhancing Learning Through Relationship Building

Session Designer: Trilby Smith, Vancouver Foundation

Location: Greenway Ballroom B/C (Second Floor)

As grantmakers, we recognize the importance of building relationships with our grantees, but how do we adequately extend that thinking to our approaches to evaluation and learning? By establishing relationships with grantees based on trust and treating them as critical partners in learning, we both get access to better information that informs and improves our work. In this session, Vancouver Foundation will share its approach to learning used in its "Fostering Change" initiative focused on youth aging out of foster care. As part of their commitment to build open relationships and improve together, the foundation and grantees developed a shared learning and evaluation agenda. Speakers will share lessons learned during implementation and describe the conditions that made the agenda possible and how learning together has enhanced their process, relationships and results. Join this session to explore how shared approaches to learning and evaluation can serve an important role in building relationships and brainstorm with peers how to overcome inherent tensions.

Speakers:

- Ashley Crossan, Fostering Change Youth Advisory Circle member
- Trilby Smith, Vancouver Foundation
- Drew Stewart, Aunt Leah's Place



Tuesday
May 3

💰 C5. Nurturing a Community and Its People Through Rural, Place-Based Philanthropy

Session Designer: Sonja Merrild, Blandin Foundation

Location: *Greenway Ballroom D/E (Second Floor)*

As grantmakers, we talk a lot about place-based philanthropy. Much of our current field knowledge comes from urban and neighborhood-focused initiatives. But how does place-based philanthropy work in rural areas? How do we strategically deploy foundation resources in support of whole communities? What happens when we don't define outcomes from the start? In this session, you will learn about work happening in rural, northern Minnesota to provide nonprofits with opportunities to identify and act on their highest priorities for capacity building so that they can serve the region more effectively. Speakers from Blandin Foundation, the largest rural-based and rural-focused private foundation in the state, along with a nonprofit partner and local capacity builder, will invite you to think about the implications for your work when grantmakers commit to a place for the long haul. Guided by critical questions, you will take part in small-group dialogue about place-based philanthropy in your own context and have an opportunity to exchange promising practices with peers.

Speakers:

- Kate Barr, Nonprofits Assistance Fund
- Susan Estee, Second Harvest North Central Food Bank
- Sonja Merrild, Blandin Foundation

📖 C6. Learning and Assessment for Unrestricted Operating Support: Assessing What Matters

Session Designer: Belen Vargas, Weingart Foundation

Location: *Greenway Ballroom F/G (Second Floor)*

Unrestricted operating support grants are a nonprofit's dream. These flexible dollars can be applied at the grantee's discretion in support of its mission. But, with uses as varied as staff salaries, office expenses or program costs, how can a funder know the impact? What are the right questions to even ask? This uncertainty around evaluating the impact of unrestricted funding is often cited by funders as a primary barrier to giving it. The Weingart Foundation, whose primary grantmaking is as unrestricted operating support, decided to address this challenge. The session will introduce Weingart's approach to assessing and learning from these grants. Foundation and grantee speakers will explain their process of co-creating a system and tools that yield mutually beneficial information. An evaluation partner and peer funder from the S.D. Bechtel, Jr. Foundation will share other approaches in the field and engage participants in a lively discussion on alternatives to traditional approaches to measuring impact. You will leave with ideas for better aligning your assessment and learning strategies with your grantmaking goals.

Speakers:

- Paul Harder, Harder+Company Community Research
- Barbara Kibbe, S.D. Bechtel, Jr. Foundation
- John Ho Song, Koreatown Youth & Community Center
- Belen Vargas, Weingart Foundation

🕒 C7. No Trust Falls: Planning the Retreat You Want to Attend

Session Designer: Joshua Joseph, The Pew Charitable Trusts

Location: *Greenway Ballroom H/I (Second Floor)*

What comes to mind when you hear the word *retreat*? It probably isn't "Sign me up!" Chances are you know firsthand what it feels like when these meetings go wrong. They waste valuable time and resources, generate frustration instead of good will and build resentment as opportunities to move strategic agendas forward are lost. Funders can do better in our roles as planners, conveners and facilitators. How well we collaborate often depends on it. In this session, speakers will illustrate how to tap the potential of retreats and other strategic meetings to yield better results for funders, partners and those we seek to help. Through the use of examples, a case study activity and small-group conversations, you will learn key steps to involve the right people, set clear priorities and goals, engage participants early, and ensure that progress during the meeting is carried forward. You will come away with a set of organizing questions and practical steps to keep your meetings relevant, right-sized and focused on desired results.

Speakers:

- Joshua Joseph, The Pew Charitable Trusts
- Bess Rothenberg, Ford Foundation

🔄 C8. Building the Strategy Plane While Flying It







Session Designer: Chris Cardona, Ford Foundation

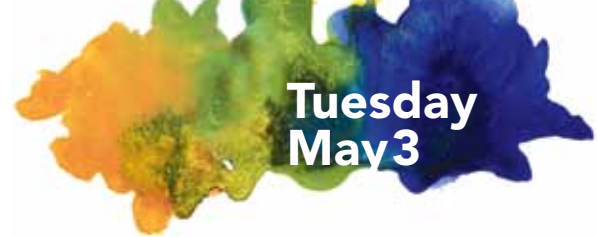
Location: *Lakeshore B/C (First Floor)*

How can foundations redesign their strategies effectively with a minimum of disruption for grantees and with the appropriate attention to their own internal organization? All too often, strategic design results in "analysis paralysis" that stalls the grantmaking process and does not lead the foundation to think clearly about how its own staff and board must reorganize to support the new approach. In this session, you'll hear from two funders, one global and one statewide, who have recently gone through significant strategy redesigns and have grappled with these very questions. Neither foundation pretends to have it all figured out, but both will share their honest experiences building the strategy plane while flying it. This candid discussion will be moderated by a nonprofit leader whose organization is a grantee of both foundations. Bring your questions and come prepared to offer personal reflections on what worked and what didn't from shifts in strategy, operations and approach that you've experienced.

Speakers:

- Fatima Angeles, The California Wellness Foundation
- Josh Kirschenbaum, PolicyLink
- Hilary Pennington, Ford Foundation

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C9. Responding Collectively to Community Flashpoints

Session Designer: Adam Donaldson, Association of Baltimore Area Grantmakers

Location: Regency Room (Second Floor)

On April 19, 2015, Freddie Gray’s death, while in police custody in Baltimore, sparked a series of peaceful marches and a day of civil unrest. Baltimore’s persistently poor neighborhoods are leaving far too many teens and young adults like Gray frustrated, angry and disconnected from hope and opportunity. In this moment of community crisis, the philanthropic response was immediate but not without questions and uncertainty. Grantmakers struggled with race, equity and inclusion; the public demand for both immediate needs and long-term change; and a desire to identify a role aligned to their missions. Through a “fishbowl” discussion, Baltimore funders and conference participants will share their community’s flashpoints. Join this session to participate in honest discussion and to identify specific roles for grantmakers required to respond collectively and effectively to a future community crisis.

Speakers:

- M. Celeste Amato, Association of Baltimore Area Grantmakers
- Kevin Griffin Moreno, Baltimore Community Foundation
- Danielle Torain, The Annie E. Casey Foundation

C10. Ramping Up Funders’ Impact With More Than Money

Session Designer: Beth Duda, The Patterson Foundation

Location: Mirage (Second Floor)

Effective grantmaking requires more than check writing and due diligence. The Campaign for Grade-Level Reading has identified eight different roles funders are playing in their local efforts across the U.S., ranging from backbone organization to learning agent to communicator, to add value beyond funding. This session will introduce a framework that defines these different roles and an assessment tool that your organization can use to take stock of all the assets it can deploy to achieve positive impact. Through a hands-on exercise, you will consider what the right role is for your foundation and discuss with speakers and peers how you can use the Campaign’s framework to align with and complement other funders in your community, regardless of the issue area you fund. Speakers from different foundations and communities will share how they’ve used the tool to examine their own strengths and assets and help achieve greater impact by playing roles beyond traditional grantmaking.

Speakers:

- Beth Duda, The Patterson Foundation
- Sherece Y. West-Scantlebury, The Winthrop Rockefeller Foundation

6:00 – 7:30 P.M.

CEO AND TRUSTEE RECEPTION

(Invitation Only)

The CEO and Trustee Reception is supported by the GHR 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 cost of your dinner at a reasonably priced restaurant located within walking distance or a short cab ride from the hotel. Please visit the conference registration desk to view location options and sign up to join or host a group. **Diners should meet in the hotel lobby area for a 6:45 p.m. departure.**

REFLECTIONS FROM DAY 2

A new insight or resource I can share with colleagues from the breakout sessions I’ve attended thus far:

A conversation I had or something I heard that left me feeling energized was:

Why?

Wednesday May 4

6:30 – 7:30 A.M.

ACTIVE HOUR

Join an Active Hour activity to get energized for the day. Advance registration is required, and space is limited. Please visit the conference registration desk to learn more and to sign up.

8:00 – 9:00 A.M.

NETWORKING BREAKFAST

Location: Nicollet Grand Ballroom (First Floor)

Enjoy a breakfast buffet as you network with conference participants and carry on the conversation from the previous day's sessions. There are also a number of peer-hosted roundtable discussions and a Salon conversation happening during this time; log in to the conference app for more information.



9:15 – 10:30 A.M.

BREAKOUT SESSIONS ROUND D AND ENCORE SESSIONS

(Select one of eight options.)

D1. Tools for Big Picture Grantmaking and Influencing Systems

Session Designer: Jamaica Maxwell, The David and Lucile Packard Foundation

Location: Lakeshore A (First Floor)

Are you a systems grantmaker? The answer is yes! We all work on issues that exist within larger, complex systems and aspire to understand the big picture in order to maximize the potential of our limited resources. In this session, participants will discuss how to apply a systems thinking approach to grantmaking and hear about the broad range of tools available to support strategy development, learning and adjusting strategies over time. Speakers will introduce a new online resource guide to support experimentation with systems tools, processes and frameworks. Plus, an international researcher will share a case example on how a multisector collaboration has applied these tools on the ground to improve regional and national health outcomes. This session will conclude with you trying your hand at a quick and effective systems tool. Come reflect on how you might integrate systems thinking into your grantmaking or go deeper with an existing systems approach. You will leave with immediately useful tools to apply in your grantmaking and expanded ideas to help you and your organization better understand and impact systems.

Speakers:

- Allan Best, The University of British Columbia
- Jamaica Maxwell, The David and Lucile Packard Foundation
- Susan Misra, Management Assistance Group

D2. Your Leadership, Your Reflective Practice







Session Designer: Hanh Le, Exponent Philanthropy

Location: Lakeshore B/C (First Floor)

As philanthropy practitioners, we are continually mastering two disciplines. We may come ready to put our content expertise to work but then encounter challenges that can't be solved by expertise alone. Often times, these are challenges that can't be addressed by just finding the right knowledge or skills — they require us to change behavior, practices and how we approach our work. In order to address these more complex challenges, we need all grantmaking staff to also build their capacity for reflective practice — in short, making sure we all have time to think about what we do, what the outcomes are and what we can do differently. Becoming reflective learners helps us get to more positive outcomes but requires all of us to utilize a different set of practices, tools and skills. Join this session to help identify the specific practices you and your colleagues can use now and to "test drive" a few practices more commonly used in other fields. Speakers will also share learnings from an ongoing project that is seeking to answer the question, "What if reflective practice was philanthropy's second discipline?"

Speakers:

- Jan Jaffe, The Giving Practice
- Janis Reischmann, Hau'oli Mau Loa Foundation

-  COLLABORATING FOR GREATER IMPACT
-  LEADING CHANGE IN PHILANTHROPY
-  LEARNING FOR IMPROVEMENT
-  SUPPORTING NONPROFIT RESILIENCE
-  STRENGTHENING RELATIONSHIPS
-  NETWORKING

D3. Addressing Race and Equity at Community Foundations

Session Designer: Tammy Dowley-Blackman, CFLeads

Location: Greenway Ballroom A/J (Second Floor)

Amid demographic changes and growing disparities for communities of color, several community foundations are applying a race and equity lens as they tackle any local challenge, from education to the environment to family economic security. To be more responsive to the needs of their regions, foundation staff and boards from places as varied as Denver, Buffalo, New York, and Dubuque, Iowa, are making changes to address issues of race, equity and inclusion in all aspects of their work, including board and staff recruitment and development, grantmaking policies and practices, formation of partnerships, and resident engagement. In this session, you'll delve deeply into how these changes look in practice. Staff from The Denver Foundation and The San Francisco Foundation will explain shifts they've made to operationalize commitments to diversity, equity and inclusion, both internally and externally, while a partner from CFLeads will share a national perspective and trends. Come learn from the experiences of your community foundation peers as you begin to shape your own organization's path forward.

Speakers:

- Judith Bell, The San Francisco Foundation
- Tammy Dowley-Blackman, CFLeads
- LaDawn Sullivan, The Denver Foundation

D4. Laying the Groundwork for Shared Measures

Session Designer: Brian Paulson, Pohlad Family Foundation

Location: Greenway Ballroom B/C (Second Floor)

The use of data-driven decision-making and outcome-based funding are popular ideas, but are more often aspirational than practical to implement for funders and nonprofits. We use metrics that are often ill-defined and focused more on activities than outcomes, and we conduct our evaluation and learning activities in isolation from peers and practitioners who could benefit from information that informs and improves their work. Without common performance measures across funding streams, grantmakers and nonprofits have a limited understanding of what works, for whom and at what level. If measuring outcomes and identifying effective practices in a larger field is a challenge you face, join this session to explore with peers how grantmakers lay the groundwork for shared learning and alignment in assessing performance. You'll hear about the work of MSPWin, a workforce funders collaborative in the Twin Cities, whose members are tackling this challenge, ultimately leading to consistency in measuring performance across public and private funding and community job training programs.

Speakers:

- Ruby Azurdia-Lee, CLUES (Comunidades Latinas Unidas en Servicio)
- Brian Paulson, Pohlad Family Foundation
- Rachel Speck, Greater Twin Cities United Way

D5. Supporting Leadership Development in Social Justice Organizations

Session Designer: Luis Arteaga, Levi Strauss Foundation

Location: Greenway Ballroom D/E (Second Floor)

When a foundation makes a long-term commitment and goes beyond grants to support the next generation of social justice leaders, creative experimentation and disruption can occur. Hear directly from the Levi Strauss Foundation about some of these disruptions as well as lessons learned from the first five years of its Pioneers in Justice program, a cohort-based investment in some of San Francisco's "bedrock" civil rights organizations. Two members of the original Pioneers class will describe how participation in the program helped their organizations reach new audiences, use technology and collaboration to further movement and network building, and develop new leadership. As PIJ is still a work in progress, speakers also will provide a behind-the-scenes look at how they structured the program for participants who might want to replicate something like it. They'll share what's in store with the next iteration of the program through 2020 and solicit your feedback on how to evolve the model, evaluate its impact and better support participating leaders. You will leave this session with tips on how to make the case among grantmaking staff and board to embrace funding for nonprofit leadership development, and how to build cultures within our foundations that support this approach as a tool for transformative social change.

Speakers:

- Luis Arteaga, Levi Strauss Foundation
- Vincent Pan, Chinese for Affirmative Action
- Lateefah Simon, Rosenberg Foundation

ENCORE SESSIONS

Find voting instructions and the list of applicable sessions on the following page (28). Cast your vote within the conference app or near the registration desk by Tuesday, May 3, at 5:45 p.m.

D6. Encore 1 — TBD (Session determined by popular vote)

Location: Greenway Ballroom F/G (Second Floor)

D7. Encore 2 — TBD (Session determined by popular vote)












Location: Greenway Ballroom H/I (Second Floor)

D8. Encore 3 — TBD (Session determined by popular vote)

Location: Skyway A/B (Second Floor)

ENCORE SESSIONS

Too many intriguing breakout sessions to choose from? Did you miss a topic of interest related to your work? Tell GEO staff and speakers which breakouts you want to see repeated. Vote for up to three of the following breakout sessions from rounds A, B or C, and the three sessions with the most votes will be repeated during round D.

-  **A3. Hoping for Smooth Sailing But Planning for Rough Seas**
-  **A4. How to Leverage the Law for Greater Impact**
-  **A7. Harmonizing Strategy and Learning**
-  **B1. Building Internal Culture to Achieve External Results**
-  **B2. Real Cost. Real Outcomes. What Funders Need to Know**
-  **B6. From Scarcity and Competitiveness to Abundance and Collaboration**
-  **C3. From Ideas to Actions: Managing Implementation to Achieve Results**
-  **C4. Enhancing Learning Through Relationship Building**
-  **C6. Learning and Assessment for Unrestricted Operating Support: Assessing What Matters**
-  **C9. Responding Collectively to Community Flashpoints**
-  **C10. Ramping Up Funders' Impact With More Than Money**

Voting opens on Monday, May 2, at 11:30 a.m. and ends on Tuesday, May 3, at 5:45 p.m. On your honor, use the conference app to cast your vote for your top three picks by clicking the "Poll" icon on the app home screen. Or, vote by placing stickers on the ballot poster near the registration desk. We will announce the results — selected sessions and room assignments — during breakfast on May 4, or look for a sign posted near the registration desk.

10:30 – 11:00 A.M.

BREAK

11:00 A.M. – 1:30 P.M.

CLOSING PLENARY BRUNCH: CONNECTING TO PURPOSE AND MAKING MEANING OF WHAT WE'VE LEARNED

Location: Nicollet Grand Ballroom (First Floor)

Many grantmakers strive to foster communities that support learning, leverage experience and make an impact. Effective leadership practices and community development are intrinsically linked, and one's personal values shape that leadership style. When we work in service of our organizations and communities, sometimes we can lose touch with our own values and leadership style. By understanding how our values show up in our work, grantmakers can play a role in shaping their organizational culture, build stronger relationships with their grantees and be impactful community leaders. How do we connect our sense of purpose to drive our day-to-day work? What new tools and ideas have we learned at the conference that we want to take home with us? How can we connect these new ideas to our personal values and our daily work? In this session, Heidi Brooks, senior lecturer in organizational behavior at the Yale School of Management and a leader of New Haven's Community Leadership Program, will offer space for reflection and sharing with peers and will help participants connect learnings from the past three days to the values and motivations that drew you to this work in the first place.

Introductory Remarks:



Bob Uyeki, Y & H Soda Foundation

Speaker:



Heidi Brooks, Yale School of Management

Closing Remarks:



Kathleen P. Enright, GEO

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 fieldwide 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.



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