This conference
program belongs to:

Grantmakers for Effective Organizations presents
in partnership with **Philanthropy Northwest:**

The Learning Conference

2019

Conference Program

May 29 – 30 | Seattle

#GEOLearn

geo
GRANTMAKERS FOR
EFFECTIVE ORGANIZATIONS

geo GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS

We know that making changes to improve grantmaking practice can be hard. The GEO community makes it easier by identifying what grantmakers can do to help nonprofits grow stronger — and how to make those improvements a reality within our organizations. With more than 7,000 grantmakers on the same journey to improve, you'll find more ways to make meaningful improvements a reality. Count on us for conferences focused on solving of-the-moment challenges, regular opportunities for peer learning, and publications that lift up best practice and examples from peers. At the end of the day, we're helping nonprofits make the fastest progress possible on the pressing challenges in the communities we serve. To learn more about GEO, visit www.geofunders.org.

Our Conference Partner

PHILANTHROPY NORTHWEST

Philanthropy Northwest is the region's largest convener of funders and grant makers in Alaska, Idaho, Montana, Oregon, Washington and Wyoming. Our network is dedicated to ensuring our communities have vibrant, healthy futures that honor our past, our people, and our cultures. To accomplish this vision, Philanthropy Northwest promotes, facilitates and drives collaborative action and cross-sector relationships to build resilient, equitable and inclusive communities. For more information, visit www.philanthropynw.org.

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2018 GEO National Conference
Photo Credit:
Carolina Kroon

Contents

Welcome

You'll leave the Learning Conference with new ideas and pursuits.

GEO, our conference partner Philanthropy Northwest, volunteer planning and host committees and sponsors welcome you to Seattle for The Learning Conference 2019. By attending this conference, you are showing your commitment to learning and creativity. Many of us are here to look for ideas and ways of doing our work, but as we'll hear in the opening session, we can remove barriers to learning by leaning into what gives us energy and owning our creativity.

As with many members of our community, GEO is in a time of transition. As is often true with change, there is also an opportunity to reflect on where we have been, where we want to be and lay the groundwork to help us get there. Like you all, we understand the importance of learning and how moments like these are ripe for us to challenge ourselves and transform the way we operate. We believe more than ever that having a learning mindset is critical to our own and philanthropy's success.

We are sure you will find something over the course of the conference that fits your needs and inspires you to make improvements to your practice, whether you're in the midst of a change process or just looking for new ideas to consider. With thought-provoking plenaries on equitable evaluation and learning with and from communities to breakout sessions that get into the details, this Learning Conference will create opportunities for you to think about traditional learning and evaluation practices and contemplate new perspectives.

We believe in the power of relationships and have structured networking opportunities sprinkled throughout the conference to make those connections come easy. Most importantly, we hope you will find your people, like-minded members of the GEO community that are on the same journey and can support you well after this conference ends.
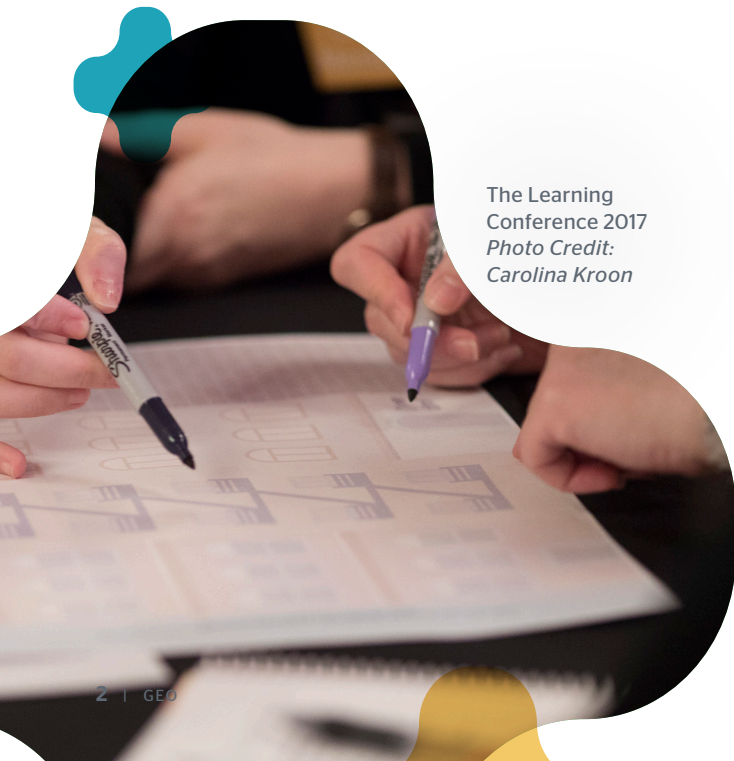
The Learning Conference 2017
Photo Credit: Carolina Kroon

J McCray
Interim Chief
Executive Officer,
GEO

Ify Mora
Director, Program Operations
Margaret A. Cargill Philanthropies
Conference Planning
Committee Chair

Conference Resources

On-Site Safety

See the conference app for more info on safety in the event of an emergency. While at the Westin, take note of exits and as a general procedure follow the instructions below:

- Remain calm and call security by dialing "7777" from any house phone.

- Establish the exact location of the emergency. Calmly explain the emergency and give your name and a number where you can be reached.

- Wait for direction from security. If safe, wait for emergency personnel to arrive and direct them to the emergency.

Guests will be directed out the nearest emergency exit and follow security to the safest assembly point. Standard gathering point is in McGraw Square, at 5th and Stuart and across the street from the hotel.

Code of Conduct

GEO conferences are spaces dedicated to learning, but participants can't learn if they don't feel safe. GEO is committed to creating a harassment-free environment for everyone. We do not tolerate harassment of anyone including conference participants, staff, vendors or volunteers in any form. GEO appreciates your partnership in ensuring that the professional environment we share is one defined by mutual respect and inclusiveness, where dignity and diversity are valued. If you experience or witness harassment of any kind, please alert any member of the GEO staff — we will be wearing red lanyards.

Healing Room

Feeling overwhelmed or need a breather during the conference? Camille Cyprian of Centered Spaces, LLC will provide an on-site healing room for participants in Olympic (Mezzanine Level). Using Radical Space Making, she will create a welcoming space to unplug and focus on taking care of yourself. Camille will be available during conference breaks and unstructured time to help participants navigate the space and suggest healing practices. The healing room will be available on Wednesday from 8:00 a.m. to 5:00 p.m. and on Thursday from 7:00 a.m. to 12:00 p.m.

Conference App

The conference app contains the important details and information needed to take full advantage of your conference experience. To download the app, search iTunes or Google Play for **"CrowdCompass AttendeeHub."** Once downloaded, search "Learning Conference 2019" and enter your name and email address. You will then receive a verification email; open the email and tap the "Verify Account" button, and you'll be logged in. To view the conference app on your browser, please go to event.crowdcompass.com/learnconf2019.

Social Media

#GEOLearn
Use this hashtag to share your insights from the conference and 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.

Community Networking Opportunities

Peer Gatherings and Discussions

Many participants and affinity groups are gathering fellow conference participants around philanthropy-related topics and conversations. Want to see what's available and join in? Download the conference app, scan the agenda and look for the "Peer Event" designation.

Participant Lounges

Lounges are available throughout the conference venue to support participant needs. The GEO Member Lounge in Grand Crescent (Grand Level) is open to GEO members for networking, meetups and refreshments. The Recharge Room in Blakely (San Juan Level) is available to all conference participants looking for a more quiet space to relax, reflect, pray or meditate. The Healing Room in Olympic (Mezzanine Level) is available for participants to engage in healing practices.

Networking Scavenger Hunt

If you want to connect with more people at the conference, we've got an easy way to break the ice! Sign up for the Networking Scavenger Hunt game in the conference app to make new and unexpected connections. Not only will you leave the event with tons of good pictures (and memories), you might also leave with the grand prize to be announced on site. Learn more in the app.

GEO's Strategic Learners Network

Interested in continuing the conversation and connecting with other like-minded GEO members? Consider joining GEO's Strategic Learners Network: a peer community whose work includes dot-connecting, pattern-finding and holding the space for internal strategic learning. We connect via quarterly video calls, over a members-only listserv and occasionally in-person at field events. This community is open to all GEO members and there is no cost to participate. All are welcome to join Thursday's Networking Breakfast discussion to connect with current members and learn more. Contact Kyle Rinne (rinne@geofunders.org) with any questions and for more information on joining the Network.

Additional Resources for Grantmakers
www.geofunders.org
Visit GEO's website for more learning opportunities and resources for grantmakers, including GEO publications and upcoming events.
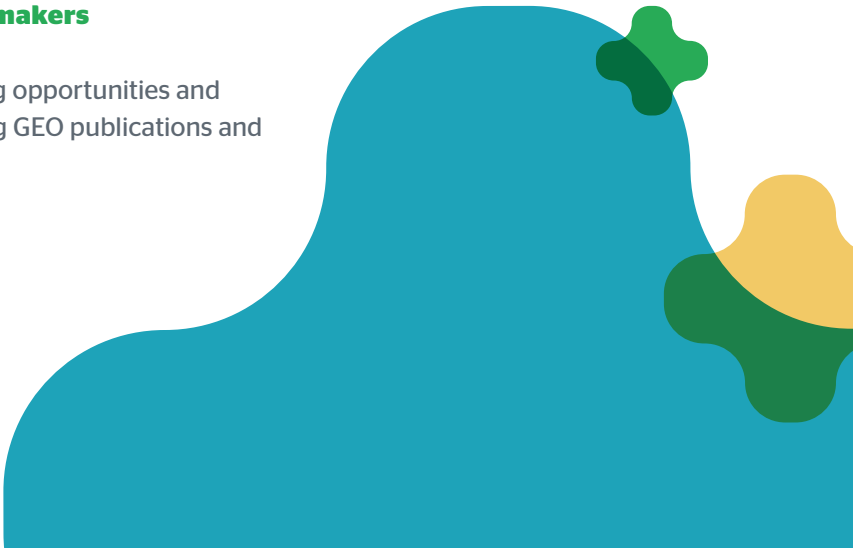
Schedule at a Glance

Tuesday, May 28

Registration is open from 2:00 – 6:00 p.m. in ⚲ **GRAND REGISTRATION ROOM (GRAND LEVEL)**

4:00 – 6:00 p.m.　**Early Arrivers Social Hour**
⚲ GRAND FOYER (GRAND LEVEL)

Wednesday, May 29

Registration is open from 7:00 a.m. to 5:00 p.m. in ⚲ **GRAND REGISTRATION ROOM (GRAND LEVEL)**.
The Registration Help Desk is open from 7:00 a.m. to 12:30 p.m. at the table outside of registration.

The following lounges are open from 8:00 a.m. to 5:00 p.m.
• Member Lounge in ⚲ **GRAND CRESCENT (GRAND LEVEL)** for networking, meetups or refreshments.
• Recharge Room in ⚲ **BLAKELY (SAN JUAN LEVEL)** for taking a break, prayer or meditation.
• Healing Room in ⚲ **OLYMPIC (MEZZANINE LEVEL)**.

8:00 – 9:00 a.m.　**Continental Breakfast**
⚲ GRAND BALLROOM II/III (GRAND LEVEL)

9:00 – 10:30 a.m.　**Opening Session: Aha! The Neuroscience of Learning**
⚲ GRAND BALLROOM II/III (GRAND LEVEL)

10:30 – 11:00 a.m.　**Break**

11:00 a.m. – 12:15 p.m.　**Breakout Round A**　　(Select one of seven options.)

A1. Using Reciprocal Learning When Your Nonprofit Partners Share Feedback
⚲ ST. HELENS (MEZZANINE LEVEL)

A2. Do-It-Yourself Improvements to Align Strategy and Culture
⚲ VASHON (SAN JUAN LEVEL)

A3. Building Data Tools for Regional Action on Equity
⚲ FIFTH AVENUE ROOM (GRAND LEVEL)

A4. Navigating Relationships between Funders, Intermediaries and Evaluators to Amplify Learning and Impact
⚲ CASCADE IC (MEZZANINE LEVEL)

A5. Co-Designing and Measuring Systems Change with and for Communities
⚲ GRAND BALLROOM I (GRAND LEVEL)

A6. Measuring Systems-Level Influence and Impact
⚲ CASCADE IA/IB (MEZZANINE LEVEL)

A7. Critiquing and Strengthening the Role of Evaluation in Social Change Efforts
⚲ CASCADE II (MEZZANINE LEVEL)
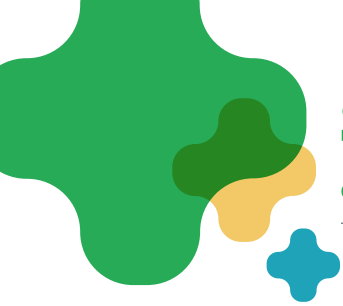
12:15 – 12:30 p.m.	**Break**
12:30 – 2:15 p.m.	**Plenary Luncheon: Learning and Evaluation Practices That Advance Equity** ◉ GRAND BALLROOM II/III (GRAND LEVEL)
2:15 – 2:30 p.m.	**Break**
2:30 – 3:45 p.m.	**Breakout Round B** (Select one of seven options.)

B1. Learning and Evaluation Approaches to Measure the Impact of Capacity-Building Programs
◉ GRAND BALLROOM I (GRAND LEVEL)

B2. Lessons from the Frontiers of Data Storytelling
◉ CASCADE II (MEZZANINE LEVEL)

B3. Charting a Roadmap for Continuous Improvement and Evidence Building
◉ ST. HELENS (MEZZANINE LEVEL)

B4. Designing Nonprofit Convenings That Build Trust and Recognize Power Imbalances
◉ CASCADE IA/IB (MEZZANINE LEVEL)

B5. Incorporating the Practice of Emergent Learning to Drive Continuous Improvement
◉ VASHON (SAN JUAN LEVEL)

B6. Fostering a Learning Culture to Advance Equity
◉ CASCADE IC (MEZZANINE LEVEL)

B7. Emphasizing Unity in Community with Lessons Learned from a Community-Based Research Project
◉ FIFTH AVENUE ROOM (GRAND LEVEL)

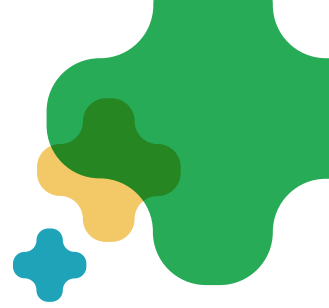| 4:00 – 5:00 p.m.	**Active Hour and Peer Events** (The Active Hour is optional and advanced registration is required. Stop by the registration desk to find out if space is available and register. Check the conference app for more info about peer events.)
5:00 – 7:00 p.m.	**Welcome Reception** ◉ FIFTH AVENUE ROOM (GRAND LEVEL)

2018 GEO National Conference
Photo Credit: Carolina Kroon

Thursday, May 30

Registration is open from 7:00 a.m. to 12:00 p.m. in ⚲ **GRAND REGISTRATION ROOM (GRAND LEVEL)**.

The following lounges are open from 7:00 a.m. to 12:00 p.m.
- Member Lounge in ⚲ **GRAND CRESCENT (GRAND LEVEL)** for networking, meetups or refreshments.
- Recharge Room in ⚲ **BLAKELY (SAN JUAN LEVEL)** for grabbing a snack or taking a break.
- Healing Room in ⚲ **OLYMPIC (MEZZANINE LEVEL)**.

7:00 – 9:00 a.m.	**Peer Events** (Check the conference app for more info about peer events.)
8:00 – 9:00 a.m.	**Networking Breakfast** ⚲ GRAND BALLROOM II/III (GRAND LEVEL)
9:00 – 9:30 a.m.	**Break**
9:30 – 11:15 a.m.	**Short Talks**

Round 1 | 9:30 – 9:55 a.m.

1A. Evaluating Progress in Grassroots Movement Work — Vanessa Daniel, Groundswell Fund
⚲ GRAND BALLROOM I (GRAND LEVEL)

1B. Technical Intuition to Navigate a Digital World — Alix Dunn, Computer Says Maybe
⚲ CASCADE BALLROOM (MEZZANINE LEVEL)

Round 2 | 10:10 – 10:35 a.m.

2A. Lean Impact: Accelerate Impact and Scale with Iterative Learning — Ann Mei Chang, author of *Lean Impact*
⚲ GRAND BALLROOM I (GRAND LEVEL)

2B. Bringing People into the Outdoors — Glenn Nelson, Trail Posse
⚲ CASCADE BALLROOM (MEZZANINE LEVEL)

Round 3 | 10:50 – 11:15 a.m.

3A. Measuring Equity, Getting to Justice — Glenn Harris, Race Forward
⚲ GRAND BALLROOM I (GRAND LEVEL)

3B. Realigning Foundation Trustees to Incentivize Learning — Tanya Beer, Center for Evaluation Innovation
⚲ CASCADE BALLROOM (MEZZANINE LEVEL)

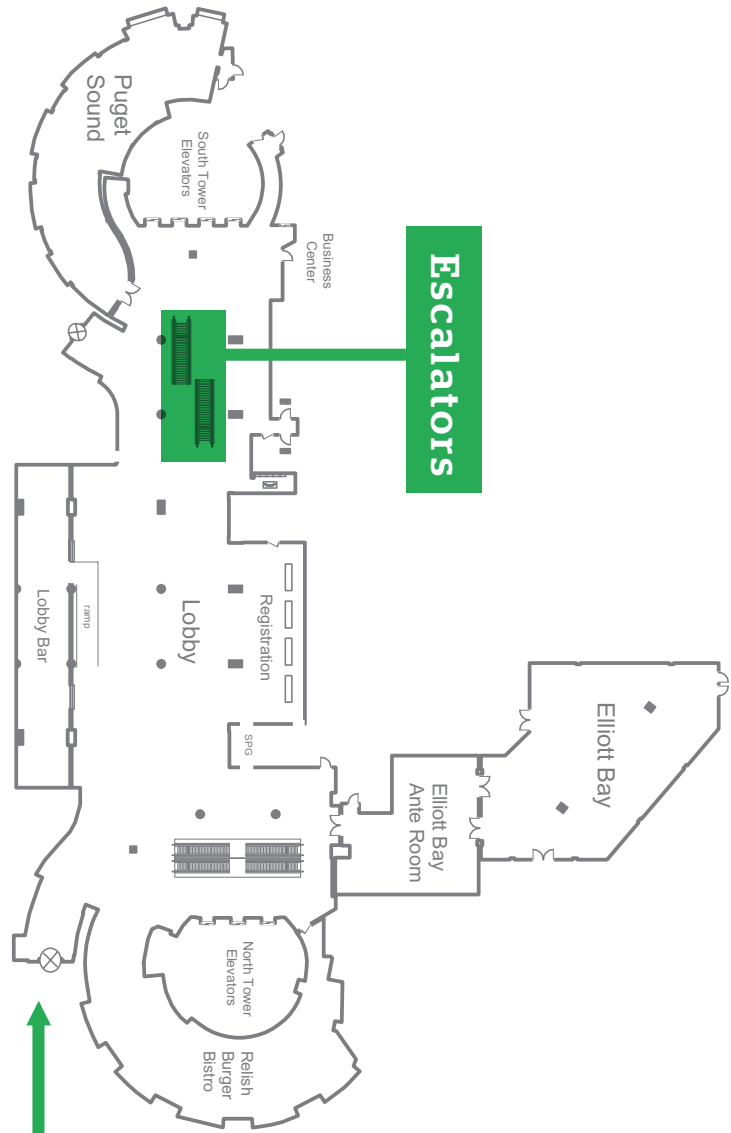|	
11:15 – 11:45 a.m.	**Break**
11:45 a.m. – 1:30 p.m.	**Closing Plenary Luncheon: Learning with and from Community** ⚲ GRAND BALLROOM II/III (GRAND LEVEL)
2:00 – 4:00 p.m.	**Post-Conference Workshop** (Optional. Advanced registration and payment is required.)

W1. Real-Life Experiments in Shifting Systems to Support Learning
⚲ FIFTH AVENUE ROOM (GRAND LEVEL)

2:00 – 5:00 p.m.	**Peer Events** (Check the conference app for more info about peer events.)

Floor Plan

Puget Sound

South Tower Elevators

Business Center

Escalators

Lobby Bar

ramp

Lobby

Registration

SPG

Elliott Bay Ante Room

Elliott Bay

North Tower Elevators

Relish Burger Bistro

Hotel Entrance

LOBBY LEVEL
(FIRST FLOOR)
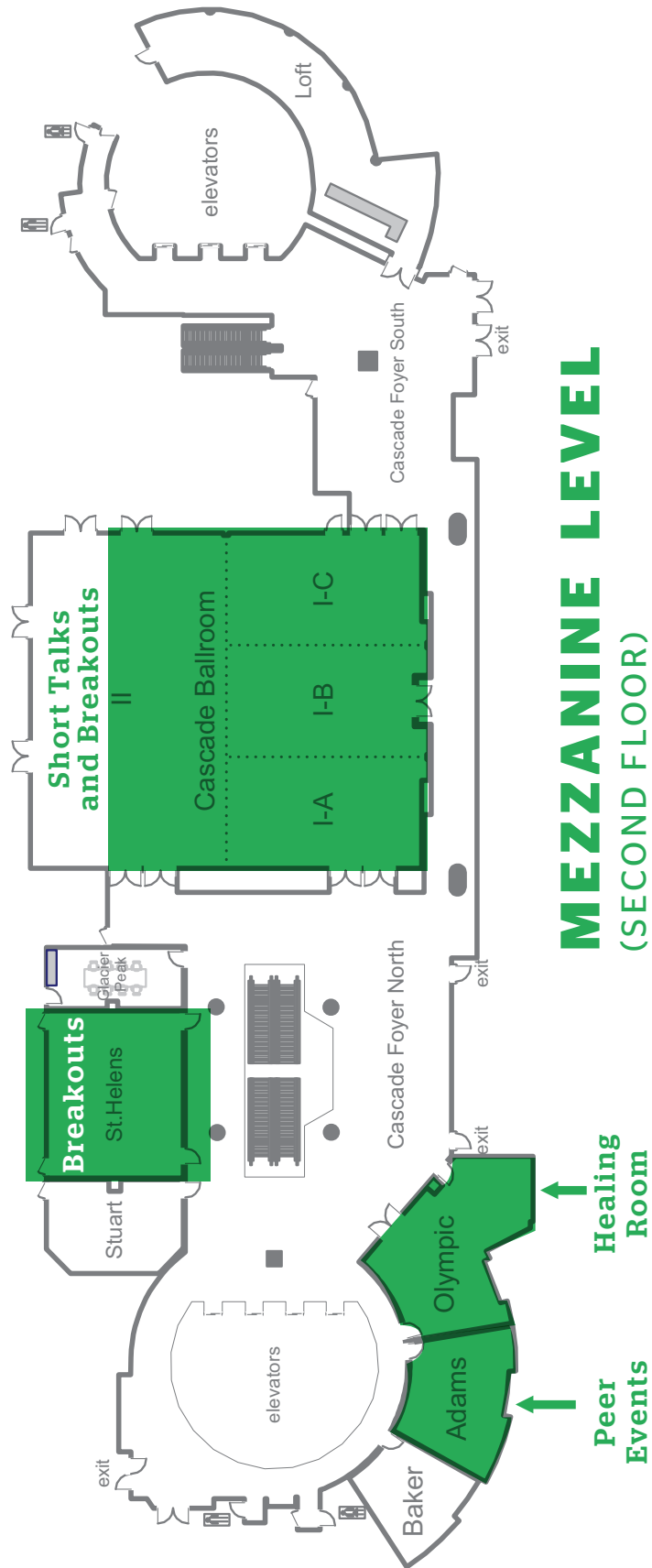
MEZZANINE LEVEL
(SECOND FLOOR)

Loft

elevators

Cascade Foyer South

exit

Short Talks and Breakouts

Cascade Ballroom

II   I-A   I-B   I-C

Breakouts

Glacier Peak

St. Helens

Stuart

Cascade Foyer North

exit

exit

elevators

exit

Baker

Adams

Olympic

Healing Room

Peer Events

SAN JUAN LEVEL
(THIRD FLOOR)

Peer Events

Orcas

Recharge Room
SAN JUAN LEVEL (THIRD

Blakely

elevators

Banquet Office

exit

San Juan Foyer

exit

Workshop + Breakouts

I

Vashon

II
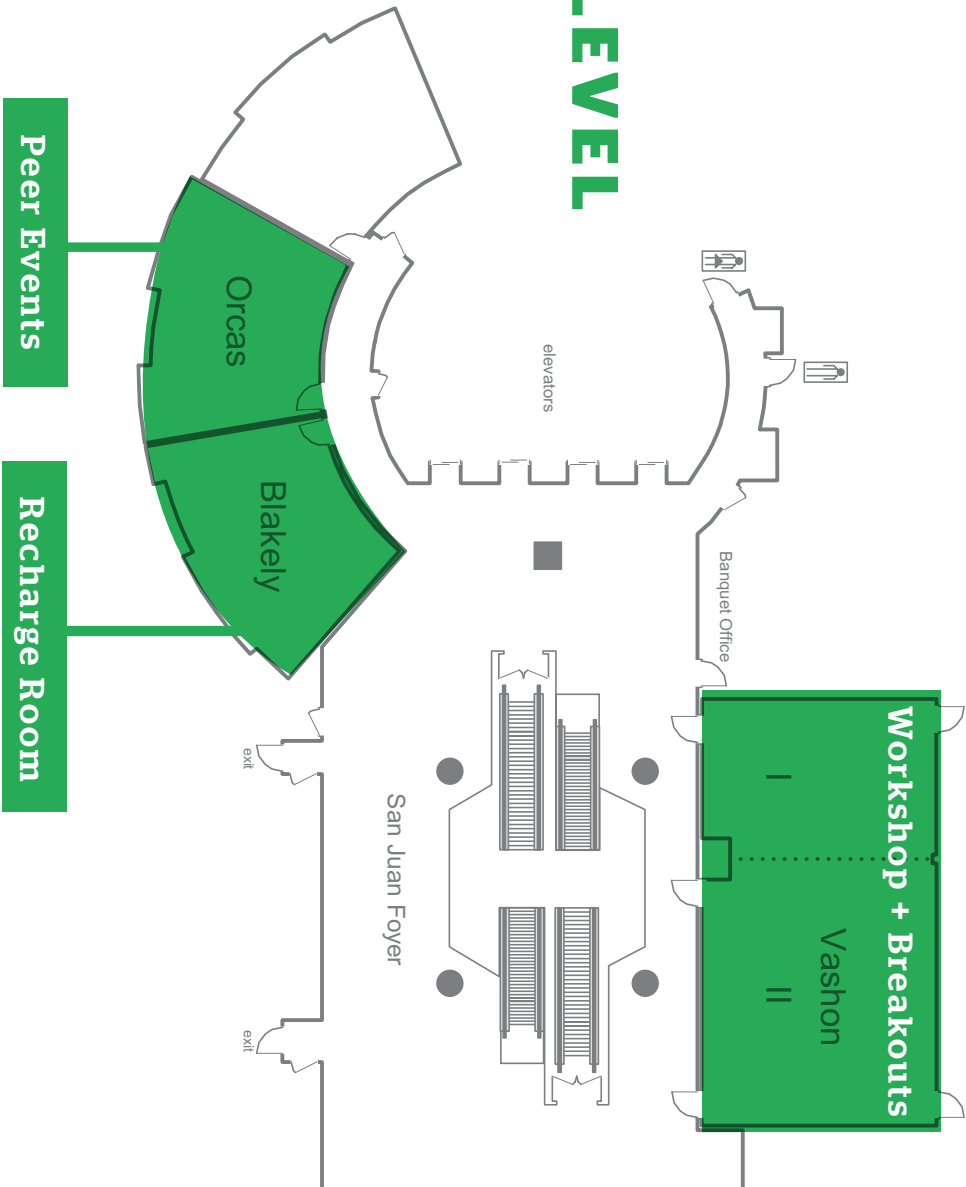
GRAND LEVEL
(FOURTH FLOOR)

Short Talks + Breakouts

Plenaries + Meals

Grand Ballroom

I   II   III

Grand Foyer

exit   exit   elevators

exit

exit   exit

Grand Crescent

Grand Convention Office

Grand Registration Room

exit   exit   exit

Fifth Avenue Room

Early Arrivers Social Hour and Networking Area

Registration Help Desk

Breakouts, Welcome Reception

Registration

Escalators

Member Lounge

Gender Neutral Bathrooms

Tuesday, May 28

4:00 – 6:00 p.m.

Early Arrivers Social Hour

📍 GRAND FOYER (GRAND LEVEL)

Start your networking early by joining your fellow conference participants for refreshments 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 hear of the exciting work happening in the Pacific Northwest. You'll also meet GEO staff, members and our conference planning and host committees!

The Learning Conference 2017
Photo Credit: Carolina Kroon

Wednesday, May 29

8:00 – 9:00 a.m.
Continental Breakfast
📍 GRAND BALLROOM II/III (GRAND LEVEL)

Enjoy a breakfast buffet as you network with conference participants.

9:00 – 10:30 a.m.
Opening Session: Aha! The Neuroscience of Learning
📍 GRAND BALLROOM II/III (GRAND LEVEL)

What happens in our brain when we learn? Neuroscience, the study of the brain and nervous system and their impact on behavior, tells us that we learn and create habits through personal "aha" moments. These aha moments, or insights, include two components integral to the act of learning: curiosity and creativity. Kicking off the conference, keynote speaker Lisa Slavid will share the science behind how creativity and curiosity work together to enable transformative learning, as well as lead participants through several activities designed for you to have your own aha moments and connect authentically with others at the same time. You will walk out of this session with your own curious questions to guide your conference experience and a focus on genuinely sharing and listening to others' questions, responses and insights.

Introductory Remarks
A) J McCray, GEO
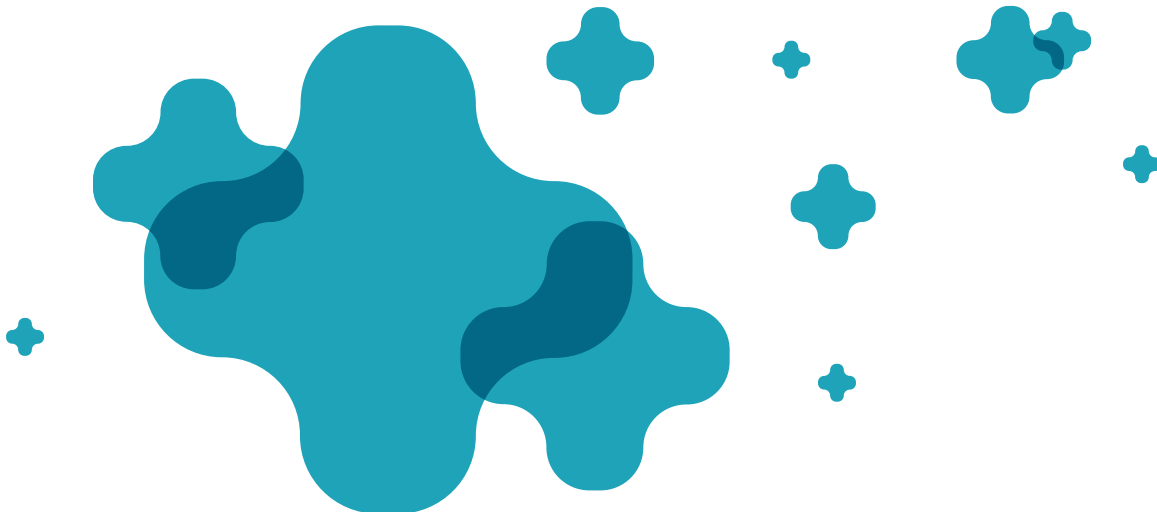*B) Kiran Ahuja, Philanthropy Northwest*

Speaker
C) Lisa Slavid, Lisa Slavid Consulting & Leadership Development

Psst — don't forget to complete the plenary evaluation in the conference app!

Wednesday
May 29

Opening Session Notes

Use this page to jot down your ideas during Lisa's talk.

Why am I attending this conference?

_____

_____

_____

_____

What are my curious questions?

1. _____

2. _____

3. _____

Trove of curious questions I collected

Notes

Wednesday
May 29

10:30 – 11:00 a.m.
Break

In case you haven't, use this time to register for the Active Hour. Please visit the conference registration desk to learn more and sign up.

11:00 a.m. – 12:15 p.m.
Breakout Sessions Round A (Select one of seven options.)

A1. Using Reciprocal Learning When Your Nonprofit Partners Share Feedback
Session Designer: Laura McCargar, Perrin Family Foundation
 ST. HELENS (MEZZANINE LEVEL)

What does it take to truly hold, hear — and heed — the lessons that your nonprofit partners have to teach you? Through a case study of the Perrin Family Foundation's Building Leadership and Organizing Capacity Initiative, this session will explore reciprocal learning and unpack how to create authentic environments that enhance nonprofit capacity while advancing and improving grantmaker learning and strategy. Extending beyond the traditional frames of learning and evaluation, this session will explore applied learning, in particular how we learn in and through relationships. You will take part in REAL (Reciprocal, Equitable, Accountable Learning) talk about sticky stumbling blocks and hear concrete examples of how a grantmaker's strategy, structure and program design shifted as a result of embracing these challenges as opportunities for learning and change.

Speakers:
* *Lucas Codognolla, CT Students for a Dream, @CT4aDREAM*
* *Laura McCargar, Perrin Family Foundation, @Perrinfamilyfdn*

A2. Do-It-Yourself Improvements to Align Strategy and Culture
Session Designer: Brenda Solórzano, Headwaters Health Foundation
 VASHON (SAN JUAN LEVEL)

Peter Drucker famously said, "Culture eats strategy for breakfast." Is it true? In philanthropy the answer is often yes — but not always. Some grantmakers are learning to bring culture and strategy together for better outcomes. The Headwaters Foundation and the Ford Foundation are shaping organizational culture along with strategy by using reflective practices: techniques that help you observe organizational dynamics, make sense of what is going on and adjust behavior accordingly. Join this fun, interactive session where you will dig into culture-strategy dynamics, learn from your peers and test-drive a variety of Do-It-Yourself tools that can help you and your organization deepen relationships, hold high-stakes conversations and surface wisdom already in the room to build a culture that supports your strategy.

Speakers:
* *Jan Jaffe, The Giving Practice, @practicereflect*
* *Brenda Solórzano, Headwaters Health Foundation, @headwatersmt*
* *Marissa Tirona, Ford Foundation, @MarissaTirona*

A3. Building Data Tools for Regional Action on Equity

Session Designer: Sarah Treuhaft, PolicyLink

📍 FIFTH AVENUE ROOM (GRAND LEVEL)

Comprehensive local data, disaggregated by race, neighborhood and more, is an indispensable ingredient for policy research, development and advocacy. While data are widely available, grassroots community groups and organizers that are critical to equitable policy change often lack access to data, analysis and visualization to power their efforts. To address this need in the San Francisco Bay Area, The San Francisco Foundation partnered with the National Equity Atlas team at PolicyLink and the USC Program for Environmental and Regional Equity to build the Bay Area Equity Atlas. This community data resource was designed in partnership with organizers and advocates working across the region, and is equipping all community stakeholders with data to track, measure and make the case for equitable growth. In this session, learn how to design an equity-focused data tool that serves the broader community and integrate equitable data design principles into your work.

Speakers:
- *Alicia Lawrence, Hayward Collective*
- *Jessica Mindnich, Ph.D., The San Francisco Foundation, @jessicamindnich*
- *Sarah Treuhaft, PolicyLink, @streuhaft*

A4. Navigating Relationships between Funders, Intermediaries and Evaluators to Amplify Learning and Impact

Session Designer: Kimberly Braxton, Equal Measure

📍 CASCADE IC (MEZZANINE LEVEL)

Grantmakers that have ambitious goals to change large systems can engage intermediaries and evaluators to realize their visions, but what does it take to make these partnerships work well? Speakers will reflect on their experiences and approaches, and will share how you can turn tensions across the funder-intermediary-evaluator partnership into productive ways of working that lead to improved learning and impact. In small groups you will discuss five tensions present in the three-way partnership and discuss strategies to resolve the strains. You will walk away knowing how to "normalize" the difficulties of creating partnerships and eight promising practices to set them up for and ensure their success.

Speakers:
- *Elizabeth González, College Futures Foundation, @ElizabethlaBeti*
- *Michael Matsunaga, Engage R+D, @engagerd*
- *Joel Vargas, Jobs for the Future, @JoelVargasJFF, @jfftweets*

Wednesday
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A5. Co-Designing and Measuring Systems Change with and for Communities
Session Designer: Clare Nolan, Engage R+D
📍 GRAND BALLROOM I (GRAND LEVEL)

Greater collaboration in philanthropy is seen as critical to addressing the scale and complexity of today's social problems. Grantmakers engaged in place-based and systems change work are increasingly looking for ways to co-design strategies with nonprofits and communities to support locally driven solutions. However, many struggle to operationalize this approach given power dynamics inherent to these relationships as well as the adaptive nature of such work. This session highlights ways funders can partner with grantees and evaluators to co-develop and evaluate systems change drawing on insights and lessons from the first three years of Starting Smart and Strong, a 10-year effort of The David and Lucile Packard Foundation focusing on supporting early learning systems change in three diverse California communities. Through small group exercises, you will explore new approaches for working collaboratively with communities to design and measure systems change.

Speakers:
- *Priya Jagannathan, Oakland Public Education Fund*
- *Clare Nolan, Engage R+D, @claremnolan*
- *Bernadette Sangalang, The David and Lucile Packard Foundation*

A6. Measuring Systems-Level Influence and Impact
Session Designer: Thomas Kelly, Hawai'i Community Foundation
📍 CASCADE IA/IB (MEZZANINE LEVEL)

Most social investments are appropriately focused on the downstream direct effects on people and places, but grantmakers often have broader expectations for changes in the social system that are related to direct impact, such as impacts at the system level that are difficult to articulate and rarely measured. Defining these system-level impacts and influence early in investments can help funders focus on the full range of outcomes intended. Through case study examples and reflective exercises, you will learn how the Impact, Influence, Leverage, and Learning framework can be used to help you and stakeholders consider complementary impacts at the individual, organizational and system levels of change and identify the influence, leverage and learning outcomes desired in addition to direct impacts.

Speakers:
- *Michael Brown, Seattle Foundation, @MichaelCBrown18*
- *Susan Fairchild, Green Canopy*
- *Anne Gienapp, ORS Impact*

A7. Critiquing and Strengthening the Role of Evaluation in Social Change Efforts
Session Designer: Sarah Stachowiak, ORS Impact
 CASCADE II (MEZZANINE LEVEL)

The social sector has featured a drumbeat of voices that question the ability of measurement and evaluation to adequately capture the nuances of social movements, the work of nonprofits and true social change. While these critiques fairly question the poor or improper use of metrics and measurement for complex change endeavors, they risk swinging the pendulum too far away from assessing and refining efforts that must address entrenched systemic challenges that disadvantage some people and places over others. You will hear from a diverse group of forward-looking evaluators, grantmakers and nonprofit leaders highlighting how evaluation can and should be relevant to the social change efforts of today and tomorrow in a fast-paced presentation format. Speakers will respond to critiques with ideas both grounded in practice and with an eye toward the future. You will have an opportunity to reflect with fellow participants and ask questions.

Speakers:
- *Julia Coffman, Center for Evaluation Innovation, @Eval_Innovation*
- *Efrain Gutierrez, Obama Foundation, @efragu*
- *Daniela Pineda, Ph.D., First 5 LA, @dpinedaphd*
- *CiKeithia Pugh, Equity Matters, @EquityMattersNW*
- *Sarah Stachowiak, ORS Impact, @SarahStachowiak*

Psst — don't forget to complete your session evaluation in the conference app!

12:15 – 12:30 p.m.
Break

The Learning
Conference 2017
*Photo Credit:
Carolina Kroon*

12:30 - 2:15 p.m.

Open for Good Award and Plenary Luncheon

📍 GRAND BALLROOM II/III (GRAND LEVEL)

Open for Good Award

Each year, foundations make $5 billion in grants toward knowledge production. These assessments, evaluations, communities of practice and key findings are valuable, yet only a small fraction of foundations share what they learn, with even fewer using open licenses or open repositories to share these learnings. Foundations have demonstrated that some of the information they value most are lessons about "what did and didn't work." And yet, this is the same knowledge that foundations are often most reluctant to share. In 2018, Candid (formerly Foundation Center) launched the #OpenForGood campaign to encourage foundations to openly share their knowledge because when we are #OpenForGood, we all learn from each other — and that can make incredible things happen. The inaugural #OpenForGood Award will recognize three foundations that display creativity, field leadership, openness and a strong commitment to transparent knowledge sharing. Join us as we announce the winners of the award and hear how they are opening up about challenges, successes and failures in order to strengthen philanthropy as a sector.

Award Presenters
A) Janet Camarena, Candid, @CandidDotOrg
B) Meg Long, Equal Measure, @EqMeasure
C) Clare Nolan, Engage R+D, @claremnolan
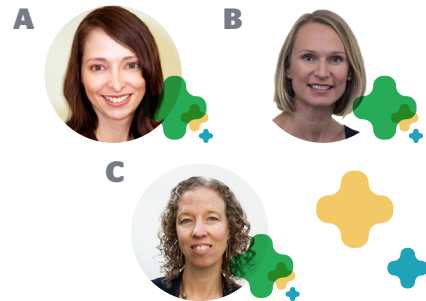
2018 GEO National Conference
Photo Credit: Carolina Kroon

Plenary Luncheon: Learning and Evaluation Practices That Advance Equity

Many grantmakers strive to have a learning culture that supports understanding, describing, documenting and demonstrating the ways in which our efforts make progress towards mission, an increasingly difficult endeavor given the complexity of the world in which we live. We are increasingly starting to consider and move towards centering equity. What are the implications for our evaluation and learning efforts? What might we be missing by not rethinking what validity means in this context? What might be possible if we revitalize our evaluation and learning approaches and tools to advance equity?

In this luncheon, we will hear from grantmaker practice partners with the Equitable Evaluation Initiative. Together we will explore why they are choosing to redefine their evaluation efforts so that they both reflect and advance equity, the impetus for their commitment to EE principles, the successes and challenges and why this shift is imperative to better learning and evaluation across the sector.

Introductory Remarks
A) Paul Beaudet, Wilburforce Foundation, @WilburforceFdn

Speakers
B) Jara Dean-Coffey, Equitable Evaluation Initiative (moderator), @equitableeval
C) Marcie Parkhurst, Walton Family Foundation
D) Trilby Smith, Vancouver Foundation
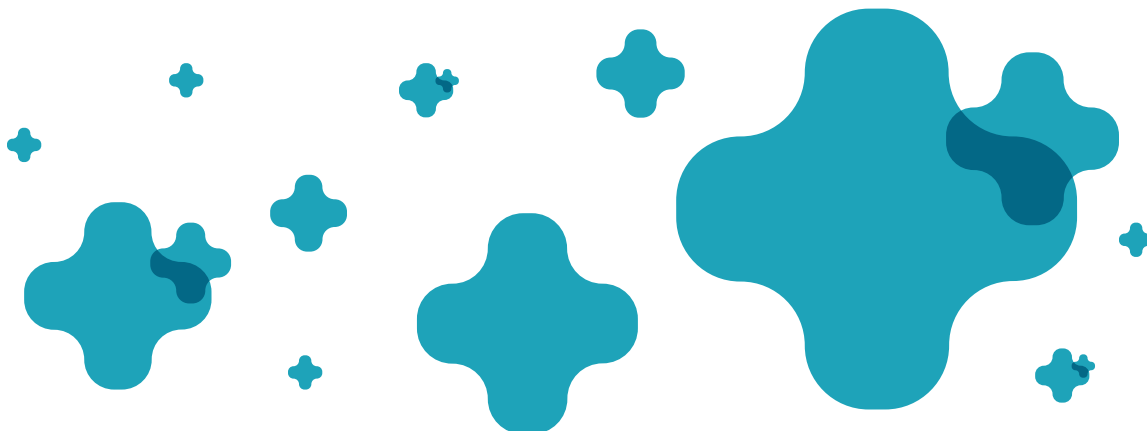*E) Hanh Cao Yu, The California Endowment*

Psst — don't forget to complete the plenary evaluation in the conference app!

2:15 - 2:30 p.m.
Break
Don't forget to check out the Recharge Room in Blakely (San Juan Level) or the Healing Room in Olympic (Mezzanine Level) if you need a moment of relaxation!

2:30 – 3:45 p.m.
Breakout Sessions Round B (Select one of seven options.)

B1. Learning and Evaluation Approaches to Measure the Impact of Capacity-Building Programs
Session Designer: Teresa Crawford, Counterpart International
 GRAND BALLROOM I (GRAND LEVEL)

An increasing number of grantmakers are investing in organizational strengthening or capacity building for their nonprofit partners. Many struggle with how to evaluate the impact of those investments. Are they investing in the right approaches? What more can nonprofits accomplish because of their investments? GEO members of all sizes have experimented with a range of learning and evaluation approaches to better understand the impact of their organizational strengthening programs. Using facilitated learning stations where you will rotate from one station to the next, this session will expose you to a range of different evaluation and learning approaches while making space for discussion of what has and has not worked specifically with organizational strengthening programs and connect you to others tackling some of the same learning questions.

Speakers
- *Nadine Long, Kansas Health Foundation*
- *Brian Treece, Findlay-Hancock County Community Foundation, @drbtreece*
- *Jennifer Wei, The William and Flora Hewlett Foundation, @jenniferwei11*

2018 GEO National Conference
Photo Credit: Carolina Kroon

B2. Lessons from the Frontiers of Data Storytelling
Session Designer: Catherine Hinrichsen, Seattle University
 CASCADE II (MEZZANINE LEVEL)

Increasing the effectiveness of your communications initiatives is possible when grantmakers connect powerful data to meaningful stories. In this interactive session, you will learn best practices for linking stories and data together to advance the goals of your organization and change the narrative with policymakers, media, donors, community members and more. Speakers will demonstrate a range of data and data visualization tools, and consider ethical issues related to data presentation and story collection, including racial and social justice and working with vulnerable populations. You will participate in a Data Walk and learn how to use the technique to engage audiences, and will leave this session with ideas on how to make data and stories work together more successfully to help you meet your communications objectives.

Speakers
• *Reiny Cohen, The Communications Hub at Fuse Washington, @ReinyCohen*
• *Christena Coutsoubos, Consultant, @ccoutsoubos*
• *Catherine Hinrichsen, Seattle University, @chinrichsen_su*
• *Anne Martens, Bill & Melinda Gates Foundation, @glossolaliac*

B3. Charting a Roadmap for Continuous Improvement and Evidence Building
Session Designer: Gabriel Rhoads, Project Evident
 ST. HELENS (MEZZANINE LEVEL)

Despite the momentum for evidence-based decision-making in the social sector, the pipeline of effective solutions to the issues grantmakers and nonprofits tackle remains thin. Project Evident is testing a new, strategic approach to evidence building that places practitioners in the driver's seat, and embeds continuous data use, learning and evaluation at the core of an organization's operations. Two nonprofits will share their efforts to create Strategic Evidence Plans, which are multiyear roadmaps to accelerate investments and activities for continuous evidence generation and program improvement that are grounded in an organization's operational reality and learning agenda. Through a mix of case studies and group discussions, you will leave this session with an understanding of how grantmakers can facilitate and support nonprofit-led evidence generation.

Speakers
• *Erika Van Buren, Ph.D., First Place for Youth, @FPFY*
• *Brad Dudding, Center for Employment Opportunities, @ceoworks*
• *Gabriel Rhoads, Project Evident, @project_evident*

B4. Designing Nonprofit Convenings That Build Trust and Recognize Power Imbalances

Session Designers: Stacy Van Gorp, See What I Mean, and Hanh Le, Weissberg Foundation

📍 CASCADE IA/IB (MEZZANINE LEVEL)

For grantmakers, our richest learning often occurs when we sit side by side with nonprofits exploring, discovering and reflecting. We gain insights that defy our assumptions, fuel action and inform strategy. Nonprofit convenings are a powerful tool for learning, and to be done well they require trust. Yet nonprofit convenings can be fraught with challenge, especially for funders who, for reasons of preference and practicality, facilitate the sessions. Challenges include power dynamics that can silence voices, especially across differences in race, ethnicity, gender, age and other identities; the need for transparency when the long shadow of future funding looms; and nonprofit-funder relationships where trust is fragile, transactional or not yet present. In this session you will explore research about the power of trust and the ways it is built and dismantled at the interpersonal and system levels, and apply these ideas to designing and facilitating more effective nonprofit learning.

Speakers
- *Michael J. Bobbitt, Adventure Theatre MTC, @mbobbitt*
- *Stacy Van Gorp, See What I Mean, @stacyvangorp*
- *Hanh Le, Weissberg Foundation, @HanhLeDC*

B5. Incorporating the Practice of Emergent Learning to Drive Continuous Improvement

Session Designer: Matthew Carr, Ewing Marion Kauffman Foundation

📍 VASHON (SAN JUAN LEVEL)

As more foundations and nonprofits focus on influencing the conditions that hold complex social problems in place, the simple power of taking time to systematically reflect on evidence to learn and improve becomes more important. However, strategic learning is much easier to discuss in theory than it is to put into practice because meaningful reflection that leads to insights requires overcoming three common hurdles: a lack of time, structure and prioritization. In this session, speakers will share their experience implementing Emergent Learning tools and practices drawn from the Fourth Quadrant Partners framework into their organizations and those they work with. Each case provides insights into the variety of ways these tools can be used, different challenges that have been encountered and alternate pathways to success. You will learn about specific tools and templates and engage in group discussions about potential opportunities to incorporate Emergent Learning practices in your work.

Speakers
- *Athena Bertolino, Ross Strategic*
- *Brett Hembree, Ewing Marion Kauffman Foundation*
- *Parvathi Santhosh-Kumar, StriveTogether, @parvskumar*

B6. Fostering a Learning Culture to Advance Equity

Session Designer: Nineequa Blanding, The Boston Foundation
 CASCADE IC (MEZZANINE LEVEL)

Local and national grantmakers understand that to meaningfully address complex societal issues, an equity lens coupled with systems-level change is necessary. The shift toward this approach is driven in part by research now shining a light on the historical, systemic and structural barriers that contribute to persistent racial and ethnic inequities — artificial barriers that are rooted in social injustice. The Boston Foundation sees the disproportionate impact of these longstanding inequities. In response it has committed to fostering a learning culture, within the Foundation and among its many partners, to understand the systems they jointly seek to change. In this session, Boston Foundation staff members will discuss their approach in utilizing learning communities to effectively engage key stakeholders; identify levers for shifting systemic practice; and serve as a compass for guiding investments to improve housing stability and family health outcomes.

Speakers
- *Nineequa Blanding, The Boston Foundation, @BNineequa, @bostonfdn*
- *Barry Keppard, Metropolitan Area Planning Council, @MAPCMetroBoston*
- *Soni Gupta, The Boston Foundation, @sonig12, @bostonfdn*

B7. Emphasizing Unity in Community with Lessons Learned from a Community-Based Research Project

Session Designer: Kimberly Spring, Annie E. Casey Foundation
 FIFTH AVENUE ROOM (GRAND LEVEL)

There is growing interest in the philanthropic community to engage in research that not only illuminates the causes and effects of inequity but is also more equitable and inclusive in the practice of research itself. In research on communities, this means engaging residents and other community members as partners in the process, from developing the research questions to interpreting and using the findings. Seeking to do just that, the Annie E. Casey Foundation launched the East Baltimore Research Project in 2017, a partnership with residents to design and implement research that will provide data that community members can use to inform efforts that affect their neighborhoods. During this session, you will hear about the tools used by foundation staff and community advisors to build their partnership and capacity to co-own the project, including practices that bolster trust and understanding while making sure community perspectives are a priority in the research.

Speakers
- *Lamontre Randall, BeMore Group, @Lamontre21*
- *Kimberly Spring, Annie E. Casey Foundation*
- *Sarah Wallace, A Baltimore Girl's Story*

Psst — don't forget to complete your session evaluation in the conference app!

Wednesday
May 29

4:00 – 5:00 p.m.

Active Hour and Peer Events

Join our Active Hour activity to decompress, renew your energy and make connections. Advance registration is required, and space is limited. Please visit the conference registration desk to learn more and to sign up.

There are also a number of partner-hosted roundtable discussions happening at this time; log in to the conference app for more information.

5:00 – 7:00 p.m.

Welcome Reception

📍 FIFTH AVENUE ROOM (GRAND LEVEL)

GEO and the conference host committee are glad to have you in Seattle! To celebrate The Learning Conference 2019, please join us for an evening of networking, cocktails, food and fun.

The Learning Conference 2017
Photo Credit: Carolina Kroon

Reflections

What aha moments did I have today?

Next I will...

Who should I be talking to?

GEO Membership Information

The GEO community makes the difference between grantmaking as usual and transformational change.

In a world where the old rules of philanthropy no longer apply, our community turns a hunger for more effective philanthropy into clear pathways for achieving it. With more than 7,000 grantmakers across the globe, our members are committed to supporting more efficient and effective nonprofit organizations.

We help grantmakers improve practices in areas that matter most to nonprofits: strengthening relationships with grantees, supporting nonprofit resilience, using learning for improvement and collaborating for greater impact. We're also focused not just on what you do, but how you get there. With emergent work on organizational culture and values; diversity, equity and inclusion; and leadership and governance, we're working together to make it easier to implement changes and help them stick within your organization.

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 much more.

Save the date for the next GEO conference:

April 27-29, 2020
2020 National Conference
Boston, Massachusetts

Registration opens to GEO members in early 2020!

Not yet a GEO member?

Join the GEO community today!

Contact membership@geofunders.org or 202.898.1840 to receive a 10 percent discount on your first year of GEO membership.
Offer valid for a limited time.

Here's what our community offers to help you advance on the issues you care about:

CURATED CONTENT, ACTIONABLE TOOLS
Whether you're new or established philanthropists, access usable tools and resources tailored to your needs — from tips and best practices to new ideas, practical steps, discussion questions and conversation starters for colleagues and board.

- Unlimited access to all of GEO's publications
- Toolkits, case studies and discussion guides*
- The Smarter Grantmaking Playbook
- Mailed copies of GEO's latest publications and research*
- GEOList, an online platform offering instant support and feedback from your grantmaking peers*

- Bi-monthly digest packets with information and resources related to specific content areas*
- Discounts on subscriptions to leading publications, including *The Foundation Review, Stanford Social Innovation Review, The Nonprofit Quarterly and Alliance magazine* and more*

CONNECTIONS WITH PEERS
Address shared challenges in grantmaking and build knowledge with peers, to ultimately bridge the gap between what works and how to make it happen within your organization. Stay informed of emerging philanthropic trends and promising practices, and find support for experimentation and growth.

- Discounts and priority registration for all of GEO's sellout conferences and in-person events*
    - *GEO conferences consistently receive a 95 percent satisfaction rating from participants.*
- In-person learning opportunities, including workshops focused on key topics (e.g. capacity building, grantee inclusion and change management) as well as long-term cohort programs

- Remote learning opportunities, including our in-depth Remote Learning Series,* webinars to support GEO's core smarter grantmaking approaches and member calls* organized by members to lift up questions around specific content
- GEO Staff — Available year-round to connect you directly with peers navigating the same journey

Benefit reserved for GEO members

Thursday, May 30

7:00 – 9:00 a.m.
Peer Events
Many conference participants and affinity groups will host gatherings and discussions on philanthropy-related topics. To see what's available and join, download the conference app, scan the agenda and look for the "Peer Event" designation.

8:00 – 9:00 a.m.
Networking Breakfast
📍 GRAND BALLROOM II/III (GRAND LEVEL)
Enjoy a breakfast buffet as you network with conference participants and carry on the conversation from yesterday's sessions.

9:00 – 9:30 a.m.
Break

9:30 – 11:15 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/topic during each of the three rounds. There will be a short break in between each talk to allow you time to make your next selection and change rooms, if necessary.

Time Slot	Room A: Grand Ballroom I (Grand Level)	Room B: Cascade Ballroom (Mezzanine Level)
Round 1: 9:30 – 9:55 a.m.	1A. Vanessa Daniel Groundswell Fund	1B. Alix Dunn Computer Says Maybe
Round 2: 10:10 – 10:35 a.m.	2A. Ann Mei Chang author of *Lean Impact*	2B. Glenn Nelson Trail Posse
Round 3: 10:50 – 11:15 a.m.	3A. Glenn Harris Race Forward	3B. Tanya Beer Center for Evaluation Innovation

9:30 – 9:55 a.m.
Round 1 Talks

1A. Evaluating Progress in Grassroots Movement Work
Vanessa Daniel, Groundswell Fund, @groundswellaxn
 GRAND BALLROOM I (GRAND LEVEL)

If funders fail to pay attention to the roots of societal inequities, creating a just and equitable society is not truly possible. Without equitable intentionality, the dollars that flow into communities to do good will instead perpetuate existing systems of inequity, disproportionately flow away from communities of color and fail to give information on actual progress made by grassroots organizations. Join this talk to hear from Vanessa Daniel, executive director of Groundswell Fund, as she shares the adaptations they have made to their approach for evaluating grassroots efforts. These include examinations of the ways that implicit bias shapes evaluation metrics, the centering of communities in nurturing a culture of collecting and sharing data so that it can be used to show growth, progress and results, and how Groundswell is inspiring and supporting grassroots organizations as they leverage their data to build broader support in their communities and with other funders.

1B. Technical Intuition to Navigate a Digital World
Alix Dunn, Computer Says Maybe, @alixtrot
 CASCADE BALLROOM (MEZZANINE LEVEL)

What would it take to build the right types of knowledge so everyone can demystify and leverage the world around us? Technology has near universal impact, and yet very few have the knowledge and confidence necessary to shape it for our purposes. Fear not! We don't all need to learn to code to navigate and influence our digital world. Join Alix Dunn, a fellow at Harvard Kennedy School and the Stanford Center for Philanthropy and Civil Society and the founder of Computer Says Maybe, a firm that develops products to shape and support equitable innovation, as she discusses "technical intuition," new ways of thinking about the technical capacities of the 21st century. In this talk, Alix will offer a path towards new forms of learning in our increasingly digital world.

10:10 – 10:35 a.m.
Round 2 Talks

2A. Lean Impact: Accelerate Impact and Scale with Iterative Learning
Ann Mei Chang, author of Lean Impact, @annmei
 GRAND BALLROOM I (GRAND LEVEL)

Despite all our enormous efforts, does it ever feel like we're just not making enough of a dent on the societal problems that matter? When our current solutions are insufficient to the needs, we need to find new solutions that can move the needle. Grants that are too restrictive or focused on short-term gains can undermine progress. Instead, the right funding mechanisms can encourage innovation, drive agility and increase performance — all while minimizing risk. In this talk, Ann Mei Chang, author of *Lean Impact: How to Innovate for Radically Greater Social Good* and former Chief Innovation Officer at USAID and Mercy Corps, will reveal tools that grantmakers can use to accelerate impact by unleashing the ingenuity of their partners. *Ann Mei will be signing copies of her book following the Short Talks in the Grand Foyer (Grand Level).*

Thursday
May 30

2B. Bringing People into the Outdoors
Glenn Nelson, The Trail Posse, @trailposse
📍 CASCADE BALLROOM (MEZZANINE LEVEL)

There are subtle and not so subtle ways that organizations and communities signal who's in and who's out. In environmental spaces, that signaling can contribute to false narratives that people of color engage less or not at all with the outdoors and public spaces. In this talk, we'll hear from Glenn Nelson, the founder of The Trail Posse, a nonprofit journalism and advocacy project seeking to change the perception of the outdoors to be more equitable and inclusive as he shares examples from his own life and personal experience to explain the extent of the disconnect that can be created when people of color don't see themselves in representations of a community. As a journalist and photographer, Glenn will share his passion for the outdoors while forcing us to reconsider how we think about inclusivity and who we're bringing into our work.

10:50 – 11:15 a.m.
Round 3 Talks

3A. Measuring Equity, Getting to Justice
Glenn Harris, Race Forward, @iamglennharris
📍 GRAND BALLROOM I (GRAND LEVEL)

If we want an equitable world, we have to think about how we'll measure it. How will we know we're there if we don't? Philanthropy has a critical role in expanding our understanding of measurement and how it is reflected in our values and investments. Join the discussion with Glenn Harris, President at Race Forward, to discuss the complex relationship between equity, justice and power and how Race Forward has been expanding the current approach of measuring progress. This talk will include a discussion of the importance of measurement and the limitations of current ways of measuring systems change, culture and values. What does it mean to measure equity?

3B. Realigning Foundation Trustees to Incentivize Learning
Tanya Beer, Center for Evaluation Innovation, @Eval_Innovation
📍 CASCADE BALLROOM (MEZZANINE LEVEL)

Foundation evaluation leaders know that a foundation's board of trustees plays a critical role in shaping the evaluation and learning culture of the organization. Despite this and philanthropy's growing awareness that complex change requires continuous learning and adaptation, few have cracked the code on exactly *how* the routines and behaviors of boards (and of foundation staff vis-à-vis their boards) get in the way of smart learning and adaptation. At best, board routines — from how accountability is operationalized, to how performance expectations are set and measured, to how staff focus and prepare board materials and presentations — send mixed messages to staff about navigating uncertainty and its inevitable hiccups. At worst, how a board functions can work at complete cross-purposes to learning. In this talk, Tanya Beer of Center for Evaluation Innovation will explore ideas about how to shift boards' mental models and reimagine board/staff conversations so that boards support, incentivize, and even participate in high-quality, transformative learning.

11:15 – 11:45 a.m.
Break

11:45 a.m. – 1:30 p.m.
Closing Plenary Luncheon: Learning with and from Community
📍 GRAND BALLROOM II/III (GRAND LEVEL)

How do grantmaking organizations need to shift their practices to work with and learn from the communities they serve? In this energetic closing plenary session, we will be joined by speakers who will share ideas for ways that funders can begin to bridge gaps and reflect on questions all organizations face. For instance, how can funders transform internal processes in ways that are meaningful, equitable and values-aligned? How can funders better recognize existing talents and expertise in communities? How can foundation boards and staff engage nonprofits and community members in their learning work in ways that honor all voices? What are the funder activities that turn community stakeholders off before the work has had a chance to get off the ground? In this series of brief talks, we'll reflect on how funders can increase the effectiveness of their learning work by hearing from and learning with community differently.
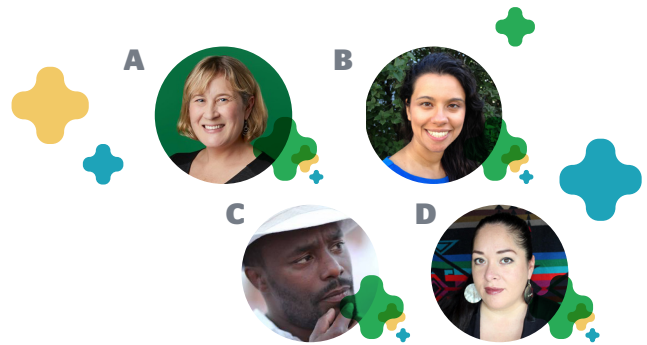
Introductory Remarks
A) Kathy Reich, Ford Foundation

Speakers
B) Nicola Chin, Up With Community, @nicolamchin
C) DeAmon Harges, The Learning Tree, @rovinglistener
D) Abigail Echo-Hawk, Seattle Indian Health Board, @echohawkd3

2:00 – 4:00 p.m.
Post-Conference Workshop
(Optional. Advance registration and payment is required.)

### W1. Real-Life Experiments in Shifting Systems to Support Learning
Session Designer: Huilan Krenn, W.K. Kellogg Foundation
📍 FIFTH AVENUE ROOM (GRAND LEVEL)

Rigorous learning is not simply a technical problem solved by having the right tool or data. It is a set of capacities and habits that are practiced. This workshop will detail doable experiments that you can use to apply a systems mindset and shift system levers in your organization to support robust learning habits. It will draw on the experiences of 13 learning leaders in grantmaking organizations that came together in a lab over nine months to have their experiments with learning recorded. You will learn about those experiments, from the hypotheses, interventions, and results to the failures and adaptations, and practice generating your own hypotheses about supporting learning. You will walk away with tools and ideas about interventions that can be used and adapted to support learning in any organizational setting and how dynamic learning systems promote diversity, equity and inclusion.

Speakers
• *Irit Houvras, American Jewish World Service*
• *Huilan Krenn, W.K. Kellogg Foundation*
• *Jane Reisman, Ph.D.*
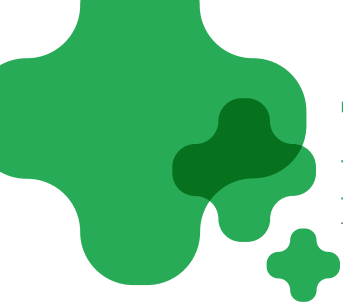
Thursday
May 30

Reflections

What aha moments did I have today?

Next I will...

Who should I be talking to?

$50,000 and above

BILL & MELINDA
GATES *foundation*

$20,000 to $49,999

CAMPION FOUNDATION

marguerite **casey** foundation
Change for families. By families.

WALTON FAMILY
FOUNDATION

STATEWIDE
CAPACITY
COLLABORATIVE

Wilburforce
Foundation

Up to $19,999

THE ANNIE E. CASEY
FOUNDATION

California Health Care Foundation
HEALTH CARE THAT WORKS FOR ALL CALIFORNIANS

casey family programs

Cedarmere Foundation
STRENGTHENING NONPROFITS TO HELP COMMUNITIES THRIVE!

COLLEGE
FUTURES
FOUNDATION
*More Graduates for a
Thriving California*

1ST LA
first 5 la
Giving kids the best start

Microsoft

Missouri Foundation
for *Health*
a catalyst for change

MEDINA
FOUNDATION

Pride
Foundation

PHC | Pennsylvania
Humanities
Council

SEATTLE
FOUNDATION

THE TOW FOUNDATION

RAIKES
FOUNDATION

VADON FOUNDATION

Notes

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