

This **conference**
program belongs to:

Grantmakers
for Effective
Organizations
presents

The Learning Conference 2017

#GEOLearn • bit.ly/geolearn

MAY 31 - JUNE 1
CHICAGO
WESTIN RIVER NORTH

geo
GRANTMAKERS FOR
EFFECTIVE ORGANIZATIONS

Held in Partnership with **Forefront**



The GEO community makes the difference between grantmaking as usual and transformational change. We're more than 6,000 grantmakers working together to turn a hunger for more effective philanthropy into clear pathways for achieving it. We're cutting through the noise to lift up the practices that matter most to nonprofits. The GEO community gives grantmakers the opportunity to work with others navigating the same journey to improve. With conferences focused on solving of-the-moment challenges, regular opportunities for peer learning, and publications that lift up best practice and examples from peers, GEO speeds grantmakers' progress on the road to effectiveness. To learn more about how GEO is making faster progress possible, visit www.geofunders.org.



Forefront builds a vibrant social impact sector for all the people of Illinois. Forefront is the nation's only statewide membership association for nonprofits, grantmakers, public agencies, advisors and our allies. We provide education, advocacy and thought leadership, and facilitate collective action around issues that are important to our members and to the sector.

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Welcome	2
Resources & Networking Guide	3
Schedule at a Glance	4
Tuesday Program	8
Wednesday Program	12
Thursday Program	28
GEO Membership	37
Notes	41
Floor Plans	Inside Back Cover

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Welcome

We think you're going to find something special here in Chicago.

Over the next few days, you'll come together with peers on the same journey to improve, to share perspectives, and to lift up those practices and approaches that really work. You'll discover new ways to learn alongside nonprofits, colleagues, partners and the communities we serve so that we can all find what's working to speed progress and learn where we can change. You'll take home actionable steps, new ways to bring your peers along with you and connections that will power your growth for years to come.

On behalf of the GEO staff, the conference planning and host committees, our sponsors, and our regional partner, Forefront, we are so excited to welcome you to the Learning Conference 2017! Our time together will be packed with practical sessions, structured networking and informal conversations to help give you the stimulating ideas and practical tools that will inform your own work.

This moment is the perfect opportunity for all of us to come together for a conversation on how we can use learning and evaluation to improve. As we think about how to give nonprofits the support they need to make more and faster progress — especially in times of uncertainty like these — it all comes back to how we are looking to see where we can grow. You're attending this conference because you understand the importance of figuring out why things turned out the way they did — so you can both expand on successes and learn from failures.

And we're particularly thrilled to announce that our Fail Fest will be back for a third time. On Wednesday night, you'll have the opportunity to hear from four peers who are willing to share candid stories of failure and hard lessons learned.

As you reflect on your conference experience once you're back home in the coming days, weeks and months, we hope you're left with a new understanding of your work, new ideas to implement and new connections you can call on for support!



Kathleen Enright

President and CEO
Grantmakers for Effective
Organizations



Meghan Barp

Senior Vice President,
Community Impact
Greater Twin Cities United Way
Conference Planning
Committee Chair

Resources and Networking Guide



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/x6kQ> (case sensitive), or scan the QR code below to view the online event website. Conference sessions and activities with more detailed information in the app are noted throughout the program. The conference app is supported by The Annie E. Casey Foundation.



Twitter

#GEOLearn

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

@GEOfunders

Follow @GEOfunders for updates during the conference and for news, resources and opportunities throughout the year.

Membership Table

Stop by the GEO membership table – located near the conference registration desk – to explore recent resources, order hard copies of GEO publications or chat with a GEO staff member. The membership table will be staffed during breaks.



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. Visit the conference registration desk for more information.



Networking Scavenger Hunt

Want to connect with more people at the conference? We've got an easy way to break the ice! Sign up for the 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. Learn more in the app.

Schedule at a Glance

Tuesday, May 30

Registration is open from 1:00 p.m. to 6:00 p.m. in 📍 THE HOTEL LOBBY.

1:15 – 4:00 p.m. **Site Visits** (Optional. Advance registration and payment are required.)
Site Visits are supported by The Brinson Foundation.

S1. Place Lab: Creating Social-Learning Networks
📍 OFF-SITE

1:30 – 3:30 p.m. **Pre-Conference Workshops** (Optional. Advance registration and payment are required.)

W1. Embedding Intentional Group Learning into Everyday Work
📍 JACKSON PARK (RIVER LEVEL ONE)

W2. Developing Systemic Theories of Change
📍 GRANT/LINCOLN PARK (RIVER LEVEL ONE)

4:00 – 6:00 p.m. **Early Arrivers Happy Hour**
📍 RIVERFRONT ROOM (HOTEL LOBBY LEVEL)

Wednesday, May 31

Registration is open from 7:30 a.m. to 6:00 p.m. in 📍 GRAND COURT (RIVER LEVEL TWO).

8:00 – 9:00 a.m. **Continental Breakfast**
📍 GRAND COURT (RIVER LEVEL TWO)

9:00 – 10:30 a.m. **Opening Session: Building a Learning Culture**
📍 GRAND BALLROOM (RIVER LEVEL TWO)

10:30 – 11:00 a.m. **Break**

11:00 a.m. – 12:15 p.m. **Breakout Sessions Round A** (Select one of six options. Use the check box to mark which session you want to attend.)

☐ **A1. Incorporating Equitable Evaluation in Your Practice**
📍 PROMENADE BALLROOM B (RIVER LEVEL TWO)

☐ **A2. Co-Creating an Evaluation Process with Nonprofits**
📍 PROMENADE BALLROOM A (RIVER LEVEL TWO)

☐ **A3. Moving from Beneficiary Feedback to Inclusion**
📍 JACKSON PARK (RIVER LEVEL ONE)

☐ **A4. The Fluid Process of Nonprofit Evaluative Capacity Building**
📍 GRANT/LINCOLN PARK (RIVER LEVEL ONE)

Schedule at a Glance

- ☐ **A5. Learning Through Reflection and Analysis to Inform Planning**
📍 EXECUTIVE BOARDROOM (RIVER LEVEL TWO)
- ☐ **A6. Tools for Measuring Place-Based Systems Change**
📍 PROMENADE BALLROOM C (RIVER LEVEL TWO)
- 12:15 – 12:30 p.m. **Break**
- 12:30 – 2:00 p.m. **Plenary Luncheon: Connecting Learning and Equity**
📍 GRAND BALLROOM (RIVER LEVEL TWO)
- 2:00 – 2:30 p.m. **Break**
- 2:30 – 3:45 p.m. **Breakout Sessions Round B** (Select one of six options. Use the check box to mark which session you want to attend.)
 - ☐ **B1. Alternative Models to Support Nonprofit Learning Capacity**
📍 PROMENADE BALLROOM B (RIVER LEVEL TWO)
 - ☐ **B2. Forming a Culture of Evidence to Improve Outcomes in Place-Based Initiatives**
📍 PROMENADE BALLROOM C (RIVER LEVEL TWO)
 - ☐ **B3. Partnering with Nonprofits to Build Equity-Focused Fields**
📍 PROMENADE BALLROOM A (RIVER LEVEL TWO)
 - ☐ **B4. Breaking the Barriers for Honest Feedback**
📍 JACKSON PARK (RIVER LEVEL ONE)
 - ☐ **B5. Strengthening the Evidence Base for Impact Investing and Market Solutions**
📍 EXECUTIVE BOARDROOM (RIVER LEVEL TWO)
 - ☐ **B6. Harnessing Disaggregated Data to Advance Racial and Economic Equity**
📍 GRANT/LINCOLN PARK (RIVER LEVEL ONE)
- 4:00 – 5:00 p.m. **Active Hour** (Optional. Advance registration is required.)
📍 OFF-SITE
- 5:30 – 7:00 p.m. **Fail Fest and Evening Reception**
📍 GRAND BALLROOM (RIVER LEVEL TWO)
The Fail Fest and Evening Reception is supported by the Walton Family Foundation.
- 7:00 – 9:00 p.m. **Dine Arouds** (Optional. Advance registration is required.)
📍 OFF-SITE (MEET IN THE HOTEL LOBBY FOR A 6:45 P.M. DEPARTURE)

Schedule at a Glance

Thursday, June 1

Registration is open from 7:30 a.m. to 3:00 p.m. in  GRAND COURT (RIVER LEVEL TWO).

6:30 – 7:30 a.m.

Active Hour (Optional. Advance registration is required.)

 WESTINWORKOUT® FITNESS STUDIO (MEZZANINE LEVEL)

8:00 – 9:00 a.m.

Networking Breakfast

 GRAND COURT (RIVER LEVEL TWO)

9:00 – 9:30 a.m.

Break

9:30 – 11:15 a.m.

Short Talks (Select one of two options from each round. Use the check box to mark which sessions you want to attend.)

Round 1: 9:30 – 9:55 a.m.

- ☐ **1A.** Escaping the Echo Chamber
Jessamyn Shams-Lau, Peery Foundation
 PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)

- ☐ **1B.** Who Do You Think We Are?
Trabian Shorters, BMe Community
 ASTOR BALLROOM (RIVER LEVEL ONE)

Round 2: 10:10 – 10:35 a.m.

- ☐ **2A.** Weapons of Math Destruction
Cathy O'Neil, Author of Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy
 PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)

- ☐ **2B.** Disrupting a City's Culture Using Evidence-Based Optimism
Liz Dozier, Chicago Beyond
 ASTOR BALLROOM (RIVER LEVEL ONE)

Round 3: 10:50 – 11:15 a.m.

- ☐ **3A.** Listening to Communities for Transformational Change
Rami Nashashibi, Inner-City Muslim Action Network
 PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)

- ☐ **3B.** Visualizing Data for Your Audience
Jon Schwabish, Policy Viz and Urban Institute
 ASTOR BALLROOM (RIVER LEVEL ONE)

Schedule at a Glance

11:30 a.m. – 12:15 p.m.

Moderated Conversations with Short Talk Speakers

(Select one of six options. Use the check box to mark which session you want to attend.)

- ☐ **1A.** Jessamyn Shams-Lau, Peery Foundation
📍 JACKSON PARK (RIVER LEVEL ONE)
- ☐ **1B.** Trabian Shorters, BMe Community
📍 GRANT PARK (RIVER LEVEL ONE)
- ☐ **2A.** Cathy O'Neil, Author of *Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy*
📍 LINCOLN PARK (RIVER LEVEL ONE)
- ☐ **2B.** Liz Dozier, Chicago Beyond
📍 EXECUTIVE BOARDROOM (RIVER LEVEL TWO)
- ☐ **3A.** Rami Nashashibi, Inner-City Muslim Action Network
📍 PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)
- ☐ **3B.** Jon Schwabish, Policy Viz and Urban Institute
📍 ASTOR BALLROOM (RIVER LEVEL ONE)

12:30 – 2:00 p.m.

Closing Plenary Luncheon: Learning Culture in Action

📍 GRAND BALLROOM (RIVER LEVEL TWO)

2:30 – 5:00 p.m.

Site Visits (Optional. Advance registration and payment are required.)
Site Visits are supported by The Brinson Foundation.

S2. Ingenuity: Learning Together by Navigating Data and Values

📍 OFF-SITE

S3. Right on Justice: Using Data to Apply a Racial Equity Lens to Learning

📍 OFF-SITE



**GEO MEMBER
LOUNGE**

Looking for a spot to connect with others in our community? Find your peers in the GEO Member Lounge located in 📍 WASHINGTON PARK (RIVER LEVEL ONE).

The GEO Member Lounge is open:

Wednesday from 8:00 a.m. to 5:30 p.m.

Thursday from 8:00 a.m. to 12:30 p.m.

Tuesday May 30

Conference sessions and activities with more detailed information in the app are noted throughout the program with .

1:15 – 4:00 p.m.

Site Visits

(Optional. Advance registration and payment are required.)

Site Visits are supported by The Brinson Foundation.

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 nonprofits are engaging in learning practices. Learn about the mission, strategies, challenges and accomplishments of some of the nonprofits working to improve the lives of Chicagoans.

S1. Place Lab: Creating Social-Learning Networks

📍 OFF-SITE



THE UNIVERSITY OF
CHICAGO

Place Lab

A partnership between Arts + Public Life (an initiative of UChicago Arts) and the Harris School of Public Policy, Place Lab is a catalyst for mindful urban transformation and creative redevelopment led by artist, urban planner and professor Theaster Gates. Participants will begin their site visit with a guided tour led by Arts + Public Life of the Arts Block, a planned cultural corridor on Garfield Boulevard. Visitors will explore the completed, activated spaces of the redevelopment project's first phase – the Arts Incubator, the Currency Exchange Café and BING Reading Room – and receive an introduction to ethical redevelopment, a process and set of values about spatial politics and governance that guides Gates's work.



Tuesday May 30



After the tour, participants will join an interactive panel with representatives from Place Lab, local grantmakers and the University of Chicago to learn how Place Lab leverages its monthly Ethical Redevelopment Salon Sessions to foster social-learning networks and share knowledge among urban practitioners, residents and organizations. Participants will also have the opportunity to explore how Place Lab works with grant funders to maintain relationships that evolve with project needs. The final Salon Session was in April 2017, making this an opportune moment to hear lessons learned and spark thinking about how participants can apply this model to their own work.



Tuesday May 30

1:30 – 3:30 p.m.

Pre-Conference Workshops

(Optional. Advance registration and payment are required.)

W1. Embedding Intentional Group Learning into Everyday Work

Session Designer: Hallie Preskill, FSG

📍 JACKSON PARK (RIVER LEVEL ONE)

Many organizations search for ways to be more nimble in response to competing demands and shifting priorities. However, many are stuck on operationalizing what it means to engage in intentional learning that actually supports continuous improvement within their organizations. This workshop demystifies what it means for groups and organizations to learn continuously and helps you take steps to get there. You will explore how to embed this approach into your work practices and structures, take part in two intentional interactive activities, and begin to develop an action plan to bring home with you.

Speakers:

- Efrain Gutierrez, FSG
- Hallie Preskill, FSG
- Chera Reid, The Kresge Foundation

W2. Developing Systemic Theories of Change

Session Designer: David Peter Stroh, Bridgeway Partners

📍 GRANT/LINCOLN PARK (RIVER LEVEL ONE)

Systems behave and evolve over time, but most theories of change are linear and fail to account for systems dynamics, the differences between the short- and long-term impacts of policies, and the need to integrate and sequence multiple priorities. This session will help you develop a systemic theory of change for your work and will introduce two approaches to this work: success amplification and goal achievement. During a hands-on workshop, you will develop your own theory template, as well as learn how to evaluate the theory's implementation using systems principles and how to refine your theory over time.

Speakers:

- Adeeb Barqawi, ProUnitas
- David Peter Stroh, Bridgeway Partners
- Traci Wodlinger, Eagle County (Colorado) Schools

Tuesday May 30

4:00 – 6:00 p.m.

Early Arrivers Happy Hour

📍 RIVERFRONT ROOM (HOTEL LOBBY LEVEL)

Start your networking early by joining your fellow conference participants and local nonprofit leaders for drinks and conversation. This is a great opportunity to connect with your peers, hear firsthand the exciting work happening in the Chicago area, and meet the GEO staff and conference planning and host committees!



Wednesday May 31

Conference sessions and activities with more detailed information in the app are noted throughout the program with .

8:00 – 9:00 a.m.

Continental Breakfast

📍 GRAND COURT (RIVER LEVEL TWO)

Enjoy a breakfast buffet as you network with other participants. There are also a number of peer-hosted events and discussions happening during this time; log in to the conference app for more information.

9:00 – 10:30 a.m.

Opening Session: Building a Learning Culture

📍 GRAND BALLROOM (RIVER LEVEL TWO)

Walking into a conference knowing what you want to learn and who you want to meet can be daunting to figure out – but you don't have to do it alone. To kick off the conference, join us for our energizing opening session to reflect on hurdles and opportunities of developing a culture of learning, and to connect and receive some coaching from your peers. This session will open with time to assess your learning challenges, followed by group discussion and completing a hands-on activity that illustrates what it takes to retain a learning culture. Additional exercises will push you to think about how to maximize your conference experience and accelerate networking. You'll start the day in deep conversation with some colleagues and gain a sense of how and where you can grow throughout the conference!

Introductory Remarks:

A) Kathleen Enright, GEO

Speaker:

B) Ramsey Ford, Design Impact





Wednesday
May 31

Personal Reflections on Learning

Take some time to reflect on the following questions.

What does successful learning look like for my organization?

What are my personal learning challenges in my work?

How do I contribute to my organization's learning challenges?

How do I support the development of a culture of learning at my organization?

Maximizing the Conference Experience

Consider how your personal and organizational learning can best be supported at this conference. Reflect on the following questions, and use the check boxes in the Schedule at a Glance (pages 4-7) to indicate which sessions are most aligned with your learning goals.

What are my top three learning goals for the conference?

1)

2)

3)

In what ways am I open to being influenced? In what ways do I resist influence?

What one thing could I apply “tomorrow” to elevate learning within my organization?

How will I carry this reflection through the rest of the conference?

The Connections Wall

You can learn so much from your peers. Fill out the card below and post it to the Connections Wall so that other conference participants can connect with you about similar learning goals.

Connections Card Fill out this card and use it at the Connections Wall.

Name: _____

Email address: _____

Select which topic relates most closely to my conference learning goals:

- ☐ Collaborative learning/learning with others
- ☐ The link from diversity, equity and inclusion to evaluation and learning
- ☐ Tools for putting a learning culture into practice
- ☐ Beneficiary and grantee feedback
- ☐ Systems grantmaking
- ☐ Building nonprofit capacity for learning and evaluation
- ☐ Engaging board members/trustees in learning
- ☐ Other: _____

One question related to my goal that I hope to get answered during the conference is:

I could share with others an insight or knowledge about:

Check out the Connections Wall, and use this space to write down the names and contact information of people who you want to reach out to during the conference for support and networking.

Connections name(s): _____

Connections email(s): _____

Topic to discuss with new connections:



10:30 – 11:00 a.m.

Break

Participating in GEO's Ambassador Program? Use this break as an opportunity to connect with your trios near the 📍 GEO MEMBERSHIP TABLE (RIVER LEVEL TWO) or in 📍 ASTOR COURT (RIVER LEVEL ONE). Designated signs will indicate meetup locations.

If you're not participating in the Ambassador Program but are looking for other ways to connect, use this time to register for an Active Hour, Dine Around or post-conference Site Visit. Please visit the conference registration desk to learn more and to sign up.

11:00 a.m. – 12:15 p.m.

Breakout Sessions Round A (Select one of six options.)



More detailed session descriptions are included in the conference app.

A1. Incorporating Equitable Evaluation in Your Practice

Session Designers: Teresa Behrens, Dorothy A. Johnson Center for Philanthropy, and Jara Dean-Coffey, Luminare Group

📍 PROMENADE BALLROOM B (RIVER LEVEL TWO)

As the number of grantmakers focusing on racial equity increases, we need to examine whether existing evaluation approaches match equity-focused grantmaking principles, as well as better understand how to ensure our evaluation explicitly accounts for the context of culture and structural barriers to social change. In a World Café format, you will delve into the challenges of evaluating programs focused on promoting equity. You will explore how evaluation practices can advance racial equity goals and how equitable evaluation relates to your own work.

Speakers:

- Teresa Behrens, Dorothy A. Johnson Center for Philanthropy
- Jara Dean-Coffey, Luminare Group
- Tom Kelly, Hawai'i Community Foundation

A2. Co-Creating an Evaluation Process with Nonprofits

Session Designer: Hina Mahmood, Woods Fund Chicago

📍 PROMENADE BALLROOM A (RIVER LEVEL TWO)

Though many grantmakers see the benefits, co-creating practices in partnership with grantees remains an obstacle for some funders because of conflicts such as power dynamics, time and resources. In 2013, Woods Fund Chicago worked with a grantee committee as part of a comprehensive update of its evaluation process for community organizing and public policy advocacy. Together, they developed the fund's evaluation principles and created two evaluation tools. In this session, you will learn how to engage grantees in co-creation by walking through the resulting evaluation process to produce evaluation tools that can be embedded into your work.

Speakers:

- *Jennifer Arwade, Communities United*
- *Lawrence Benito, Illinois Coalition for Immigrant and Refugee Rights*
- *Hina Mahmood, Woods Fund Chicago*

A3. Moving from Beneficiary Feedback to Inclusion

Session Designer: Maria Mottola, New York Foundation

📍 JACKSON PARK (RIVER LEVEL ONE)

Grantmakers need to go beyond asking for feedback from their grantees if they want to support creating change and learn from the nonprofit sector. Some nonprofits are already leading the way by transforming their organizations to involve the people they serve in problem solving, leadership and decision-making roles. Through small-group discussions and presentations from a grantmaker and nonprofits, you will have the opportunity to explore your values and practices on feedback and inclusion with others and learn how some nonprofits are sharing power with their beneficiaries to build individual and community capacity to create social change.

Speakers:

- *Linda S. Campbell, Building Movement Project, Detroit*
- *Sean Thomas-Breitfeld, Building Movement Project*
- *Julia Watt-Rosenfeld, Cypress Hills Local Development Corporation*

A4. The Fluid Process of Nonprofit Evaluative Capacity Building

Session Designer: Isaac D. Castillo, Venture Philanthropy Partners

📍 GRANT/LINCOLN PARK (RIVER LEVEL ONE)

Nonprofit needs are as varied as their missions — and that is especially true in terms of evaluative capacity. Some nonprofits require basic support, while others need a more sophisticated evaluation approach. Regardless, it is our role to help the nonprofits we fund with how they approach data collection and evaluation. In this session, you will experience a facilitated dialogue around how nonprofits' evaluative capacity-building needs evolve over time and how grantmakers can support this process in a respectful manner, with a focus on how nonprofit needs shift as their expertise and commitment changes.

Speakers:

- *Isaac D. Castillo, Venture Philanthropy Partners*
- *Daniel Tsin, Urban Alliance*

A5. Learning Through Reflection and Analysis to Inform Planning

Session Designer: Brad Cameron-Cooper, Winthrop Rockefeller Foundation

📍 EXECUTIVE BOARDROOM (RIVER LEVEL TWO)

The end of a strategic plan provides a natural pivot point for grantmakers to reflect on what went well and where to try something new. By looking back on previous implementation challenges and analyzing related data, grantmakers can use what they learned from the previous plan cycle to inform the next. Speakers from the Winthrop Rockefeller Foundation will share how they construct an inclusive approach that leverages input from board members, staff and grantees. You will learn a RAP (reflect, analyze, plan) framework for applying this process to your work.

Speakers:

- *Brad Cameron-Cooper, Winthrop Rockefeller Foundation*
- *Acadia Roher, independent consultant*
- *Candace Williams, Rural Community Alliance*

A6. Tools for Measuring Place-Based Systems Change

Session Designer: Justin Piff, Equal Measure

📍 PROMENADE BALLROOM C (RIVER LEVEL TWO)

Although philanthropic organizations continue to view place-based investments as opportunities for catalyzing systemic changes, many struggle with how to measure the changes they seek. Funders with investments in multiple locations find this dilemma even more pronounced. This session highlights approaches to evaluating and learning from place-based investments. Through small-group exercises, you will explore strategies for developing evaluative tools to capture key system-level changes, engaging stakeholders in evaluation and learning activities, and using learning to inform future strategies.

Speakers:

- *Christina Garcia, The James Irvine Foundation*
- *Justin Piff, Equal Measure*

12:15 – 12:30 p.m.

Break

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

12:30 – 2:00 p.m.

Plenary Luncheon: Connecting Learning and Equity

📍 GRAND BALLROOM (RIVER LEVEL TWO)

Grantmakers committed to equity know that it must be incorporated into every facet of their work, including learning and evaluation. Staff responsible for these functions are often tasked with helping their organizations clarify goals and determine indicators of what's working and what needs improvement – for funders, nonprofits and the communities we serve. Bringing an equity mindset to this work can lead to significant changes in organizational culture, as well as operational and grantmaking practices.

This session showcases different perspectives on this topic by featuring grantmakers with an equity focus who are looking closely at their learning and evaluation work to identify the right steps to take and asking questions such as: How will we get clear on what success looks like for us and our nonprofit partners, and who gets to define it? How can we determine what a commitment to racial equity or health equity means for our organization's culture, systems, grantmaking practice and operations? You'll also hear what that commitment looks like in action at organizations of different sizes and scopes as they use learning and evaluation approaches to engage communities and strive for more inclusive processes and more equitable outcomes. Speakers will share what they're learning and discuss next steps they'll take as they continue to connect their equity focus to their ongoing learning work.

Introductory Remarks:

A) *Suprotik Stotz-Ghosh, GEO*

Speakers:

B) *Susan Taylor Batten, ABFE (moderator)*

C) *Kristy Klein Davis, Missouri Foundation for Health*

D) *Christopher King, Consumer Health Foundation*

E) *Huilan Krenn, W.K. Kellogg Foundation*



2:00 – 2:30 p.m.

Break

Want to make new connections during the break? Use the conference app to view the participant roster and schedule meetings with fellow conference participants.



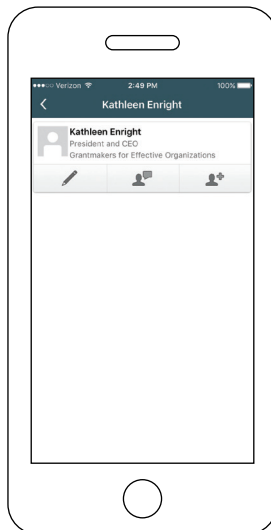
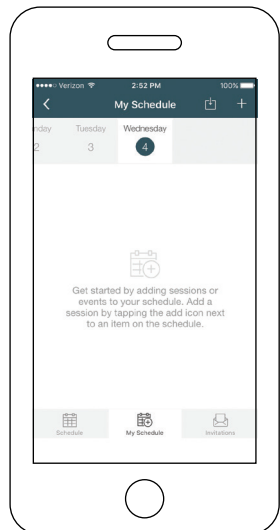
Simply visit <https://crowd.cc/s/x6kQ> (case sensitive) to download the app or search “Grantmakers for Effective Organizations” in your phone’s app store.

The conference app is supported by The Annie E. Casey Foundation.

Click the Participants icon to view the conference roster.

Find the peer you’d like to connect with. Click their name and send a message directly to them by tapping the messaging icon.

Use the “My Schedule” feature to add meetings and sync them directly with your phone’s calendar. Just click Schedule > My Schedule > Export My Schedule.



2:30 – 3:45 p.m.

Breakout Sessions Round B (Select one of six options.)



More detailed session descriptions are available in the conference app.

B1. Alternative Models to Support Nonprofit Learning Capacity

Session Designer: Mary Kopczynski Winkler, Urban Institute

PROMENADE BALLROOM B (RIVER LEVEL TWO)

We expect the nonprofit sector to produce metrics and data demonstrating results, yet nonprofits and grantmakers often disagree on who should fund those endeavors. At times, nonprofits view evaluation as compliance reporting and less about learning for themselves. This session explores models for achieving and measuring performance through deeper nonprofit-funder engagement. Come ready to challenge current assumptions, learn about two evaluative capacity-building models and explore whether these models are the best fit for your communities.

Speakers:

- *Juan Salgado, City Colleges of Chicago*
- *Danielle Scaturro, The Edna McConnell Clark Foundation*
- *Mary Kopczynski Winkler, Urban Institute*

B2. Forming a Culture of Evidence to Improve Outcomes in Place-Based Initiatives

Session Designer: Sarah A. Morrison, Center for the Study of Social Policy

PROMENADE BALLROOM C (RIVER LEVEL TWO)

A culture of evidence is critical when executing a multidisciplinary, multistrategy, place-based initiative intended to improve community members' lives. Communities need a range of methods to provide timely and actionable knowledge — as well as a learning environment to achieve better outcomes, ensure effective use of resources and provide greater accountability. In this session, you will gain ideas on how to foster a culture of evidence among your grantees by hearing how the Northside Achievement Zone in Minneapolis generates and uses evidence to improve outcomes and eliminate inequities for children and families.

Speakers:

- *Andre Dukes, Northside Achievement Zone*
- *Sarah Hernandez, The McKnight Foundation*
- *Sarah A. Morrison, Center for the Study of Social Policy*

B3. Partnering with Nonprofits to Build Equity-Focused Fields

Session Designer: Noelle Melchizedek, The Colorado Trust

📍 PROMENADE BALLROOM A (RIVER LEVEL TWO)

Modifying an existing system is not always enough to enact a vision of equity. For three years, The Colorado Trust, a health equity foundation, has undergone major transformations in its internal and external grantmaking practices to support nonprofit driven work. Funding a cohort of 18 grantees to build a field of equity advocates, the trust's strategy shifts the power and responsibility to nonprofits, who must work together to address issues around policy, advocacy and community organizing. In small groups, you will engage with the challenges and opportunities of inclusion, field building and embedding a racial equity frame into your work.

Speakers:

- William Dickerson, Brockton Interfaith Community
- Rachel Estrella, Social Policy Research Associates
- Noelle Melchizedek, The Colorado Trust

B4. Breaking the Barriers for Honest Feedback

Session Designers: Jeanné Isler and Lisa Ranghelli, National Committee for Responsive Philanthropy

📍 JACKSON PARK (RIVER LEVEL ONE)

More funders are better at understanding the value of continued learning through feedback, but gathering honest, robust feedback from grantees can be challenging. This session highlights lessons learned from 12 grantmakers assessed through Philamplify, an initiative of the National Committee for Responsive Philanthropy, around criteria shown to advance social justice and ethical foundation behavior. One foundation will share how it incorporated what it heard, and a nonprofit will discuss the barriers that exist when giving feedback to funders. You will conduct a mini assessment of your own grantmaking and discuss how feedback can help funders be better public leaders.

Speakers:

- Caitlin Duffy, National Committee for Responsive Philanthropy
- Caroline Altman Smith, The Kresge Foundation
- Junious Williams, Junious Williams Consulting, Inc.

B5. Strengthening the Evidence Base for Impact Investing and Market Solutions

Session Designer: Shawna Hoffman, The Rockefeller Foundation

📍 EXECUTIVE BOARDROOM (RIVER LEVEL TWO)

While impact investing and market-based approaches have, in recent years, expanded the pool of capital available to address social issues, efforts to measure and evaluate the impact of these investments lag behind. In an effort to strengthen the evidence base for innovative market solutions, The Rockefeller Foundation convened investors, social impact measurement specialists and evaluators throughout 2016 to advance the practice of impact measurement and evaluation, with a view to building the evidence base. This session will explore the growing consensus around what diverse stakeholders can do to contribute to advancing meaningful impact measurement. It will also share existing and emerging approaches, frameworks and methods for measuring social impact.

Speakers:

- *Veronica Olazabal, The Rockefeller Foundation*
- *Karim Harji, Purpose Capital*
- *Jane Reisman, ORS Impact*

B6. Harnessing Disaggregated Data to Advance Racial and Economic Equity

Session Designer: Russ Adams, Alliance for Metropolitan Stability

📍 GRANT/LINCOLN PARK (RIVER LEVEL ONE)

Robust datasets can help us track results and adjust our strategy, but data broken down by race, location or other variables can be an even more powerful tool in helping advance certain policy changes. In this session, local and national leaders will share their experiences using disaggregated data in campaigns for equitable transportation, public institutional reforms and inclusive regional growth. You will learn about tools that utilize disaggregated data to build the case for changes in practice and investments.

Speakers:

- *Russ Adams, Alliance for Metropolitan Stability*
- *Jessica Dalesandro Mindnich, The San Francisco Foundation*
- *Tracey Ross, All-In Cities Initiative, PolicyLink*

4:00 – 5:00 p.m.

Active Hour

(Optional. Advance registration is required.)

📍 OFF-SITE

Chicago is world-renowned for its architecture. Join the Chicago Architecture Foundation for a walking tour of downtown Chicago, where you will see some of the city's most significant buildings and learn about the history of the Windy City. **Advance registration is required, and space is limited. Please visit the conference registration desk to learn more and to sign up. Participants should meet in the hotel lobby by 3:50 p.m.**

5:30 – 7:00 p.m.

Fail Fest and Evening Reception

📍 GRAND BALLROOM (RIVER LEVEL TWO)

The reception starts at 5:30 p.m., and presentations begin at 6:00 p.m. The Fail Fest and Evening Reception is supported by the Walton Family Foundation.

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

Introductory Remarks:

A) Greg DiDomenico, Community Memorial Foundation

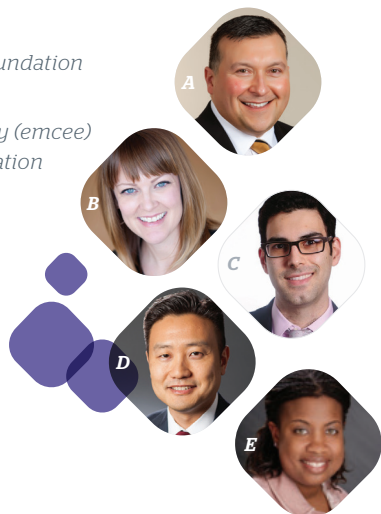
Speakers:

B) Meghan Barp, Greater Twin Cities United Way (emcee)

C) Sam Gill, John S. and James L. Knight Foundation

D) John Kim, The Annie E. Casey Foundation

E) LaTida Smith, Moses Taylor Foundation



Wednesday

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 for a 6:45 p.m. departure.**



Reflections from Day 1

My big takeaways from today:

An aha moment from today:

An action step I can take when I return to daily work:

Remember to follow up with:

About:

Remember to also check out the Connections Wall to see who you can connect with for help on your learning goals or to see how you can be of support to others at the conference!

Thursday June 1

Conference sessions and activities with more detailed information in the app are noted throughout the program with .

6:30 – 7:30 a.m.

Active Hour

(Optional. Advance registration is required.)

 WESTINWORKOUT® FITNESS CENTER (MEZZANINE LEVEL)

Join Sam Guiragossian, the hotel's personal trainer, to get energized for the day. Sam will lead you through a circuit class consisting of strength training, cardio and stretching.

Advance registration is required, and space is limited to 20 participants. Please visit the conference registration desk to learn more and to sign up.

8:00 – 9:00 a.m.

Networking Breakfast

 GRAND COURT (RIVER LEVEL TWO)

Enjoy a breakfast buffet as you network with other participants. There are also a number of peer-hosted events and discussions happening during this time; log in to the conference app for more information.

9:00 – 9:30 a.m.

Break

Use this time as an opportunity to meet back up with your Ambassador Program trios, sign up for a post-conference Site Visit or check out of your hotel room.

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. If you are struggling to make a selection, know that the Short Talks will be recorded for online viewing following the conference.

There is no Q&A during Short Talks, but following the last round of talks each speaker will pair up with a moderator for interactive discussions. So hold onto your questions until the moderated conversations at 11:30 a.m.

Time Slot	📍 PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)	📍 ASTOR BALLROOM (RIVER LEVEL ONE)
Round 1: 9:30 – 9:55 a.m.	1A. Jessamyn Shams-Lau, Peery Foundation	1B. Trabian Shorters, BMe Community
Round 2: 10:10 – 10:35 a.m.	2A. Cathy O'Neil, Author of <i>Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy</i>	2B. Liz Dozier, Chicago Beyond
Round 3: 10:50 – 11:15 a.m.	3A. Rami Nashashibi, Inner-City Muslim Action Network	3B. Jon Schwabish, Policy Viz and Urban Institute

9:30 – 9:55 a.m.

Round 1 Short Talks (Select one of two options.)**1A. Escaping the Echo Chamber***Jessamyn Shams-Lau, Peery Foundation*📍 **PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)**

Taking bold steps toward a more equitable and effective funding relationship involves recognizing that grantees' experience and perception are invaluable to grantmaker performance. To put a grantee-centric approach into action, the Peery Foundation had to find a way to ensure that it heard consistent and honest feedback from its grantees. Jessamyn Shams-Lau, the executive director of the Peery Foundation, will give an insider look at the good, the bad and the ugly of building an organizational culture of seeking, discussing and implementing feedback at a family foundation.

**1B. Who Do You Think We Are?***Trabian Shorters, BMe Community*📍 **ASTOR BALLROOM (RIVER LEVEL ONE)**

How we view the people and communities we work with is key, especially as philanthropic leaders engage with movements and communities led by people of color. What we know about these communities can be deeply, often subconsciously, influenced by negative portrayals. Trabian Shorters of the BMe Community will discuss how negative portrayals of black men and African American communities affect the ways we interact with communities. And Trabian will outline how “asset-framing” and changing the way we think and talk about certain communities can be used to combat bias, shift perspective and inspire constructive action.



10:10 – 10:35 a.m.

Round 2 Short Talks (Select one of two options.)**2A. Weapons of Math Destruction***Cathy O'Neil, Author of Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy*📍 **PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)**

Although math and data have an increasingly outsized effect on our lives, they may not be quite as neutral as we think. According to Cathy O'Neil, a mathematician and self-described data nerd, “algorithms can be as flawed as the humans they replace – and the more data they use, the more opportunities arise for those flaws to emerge.” These “weapons of math destruction” influence us in ways large and small, scoring teachers and students, granting (or denying) loans, and evaluating our work. In this talk, Cathy will expose the mathematical models that shape our future, both as individuals and as a society.



2B. Disrupting a City's Culture Using Evidence-Based Optimism

Liz Dozier, Chicago Beyond



📍 ASTOR BALLROOM (RIVER LEVEL ONE)

After years spent as an educator in Chicago Public Schools, Liz Dozier remains more committed than ever to the idea that young people in Chicago deserve opportunity and access. As the managing director of Chicago Beyond, a philanthropic venture investing in ideas and programs to amplify impact for Chicago's youth, she'll discuss how the organization's partnership with University of Chicago Urban Labs ensures that its work is powered by data even as it faces hard questions about who decides what's worth being studied and who gets to set research questions. Join Liz to hear how Chicago Beyond is bringing community voice into data collection to answer thorny questions and spur the innovation it seeks for the young people of Chicago.

10:50 - 11:15 a.m.

Round 3 Short Talks (Select one of two options.)

3A. Listening to Communities for Transformational Change

Rami Nashashibi, Inner-City Muslim Action Network (IMAN)



📍 PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)

Grantmakers have the potential to create transformative change, but when discussing high-minded ideas, it can be far too easy to mess up the mechanics of implementation, especially for communities that are not well known to grantmakers. For funders to create opportunities to hear from and partner with these communities, they must listen carefully and build understanding of the unique ways that each community operates and its particular needs. Rami Nashashibi, the executive director of IMAN, discusses how funders can engage with American Muslim identity, community activism and social justice issues for effective and truly transformative grantmaking.

3B. Visualizing Data for Your Audience

Jon Schwabish, Policy Viz and Urban Institute



📍 ASTOR BALLROOM (RIVER LEVEL ONE)

The key to effectively communicating your data is to consider what your audience needs and how your visuals can help lead them to an insight and make discoveries. To that effect, what matters is that you consider how the purpose of your visualization meets the needs of your audience, helps them do their jobs better and affects change. If you can expand how you think about sharing information by considering the many ways to visualize your data and how those visualization efforts help your audience, you will be better positioned to create clearer, more accurate and more engaging visualizations.

11:30 a.m. – 12:15 p.m.

Moderated Conversations with Short Talk Speakers

Want to hear more from a Short Talk speaker who gave a thought-provoking presentation that piqued your interest? Join a moderated conversation that will answer your questions and delve deeper into the ideas presented earlier.

1A.	Jessamyn Shams-Lau, Peery Foundation <i>Kim Ammann Howard, The James Irvine Foundation (moderator)</i>	 JACKSON PARK (RIVER LEVEL ONE)
1B.	Trabian Shorters, BMe Community <i>Luz Gomez, John S. and James L. Knight Foundation (moderator)</i>	 GRANT PARK (RIVER LEVEL ONE)
2A.	Cathy O'Neil, Author of <i>Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy</i> <i>Cheryl Chang, Sunlight Giving (moderator)</i>	 LINCOLN PARK (RIVER LEVEL ONE)
2B.	Liz Dozier, Chicago Beyond <i>Allison Barmann, Bush Foundation (moderator)</i>	 EXECUTIVE BOARDROOM (RIVER LEVEL TWO)
3A.	Rami Nashashibi, Inner-City Muslim Action Network <i>Dahnesh Medora, Meyer Memorial Trust (moderator)</i>	 PROMENADE BALLROOM A/B/C (RIVER LEVEL TWO)
3B.	Jon Schwabish, Policy Viz and Urban Institute <i>Nancy Csuti, The Colorado Trust (moderator)</i>	 ASTOR BALLROOM (RIVER LEVEL ONE)

12:30 – 2:00 p.m.

Closing Plenary Luncheon: Learning Culture in Action

📍 GRAND BALLROOM (RIVER LEVEL TWO)

As funders, we recognize that evaluation enhances grantmaker and nonprofit performance. Becoming a learning organization and supporting a learning for improvement mindset among our grantees allows us to use information to make real-time improvements to strategy and practice. Recognizing the need for adopting and maintaining a learning culture in our organizations is just the first step. How do we go about addressing the challenge of actually creating and living out a learning culture in our daily work and across our organization? What does it mean to have an active learning culture in our organizations?

During this plenary session, we will hear from a grantmaker and two local Chicago nonprofit leaders about how their culture supports turning learning into action within their organizations — and how this leads to more effective results in their work.

Introductory Remarks:

A) *Eric Weinheimer, Forefront*

Speakers:

B) *Sol Anderson, LIFT-Chicago*

C) *Maria Kim, Cara*

D) *Heather Peeler, GEO (moderator)*

E) *Pam Schwartz, Kaiser Permanente*



2:30 – 5:00 p.m.

Site Visits

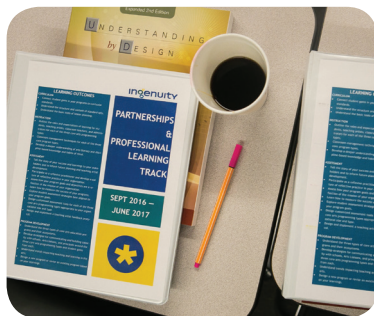
(Optional. Advance registration and payment are required.)

Site Visits are supported by The Brinson Foundation.

S2. Ingenuity: Learning Together by Navigating Data and Values

📍 OFF-SITE

ingenuity



Ingenuity is Chicago's single hub for data, strategy, advocacy and partnerships related to arts education. Founded through citywide collaboration, Ingenuity works in tandem with Chicago Public Schools Department of Arts Education, certified teachers, Chicago's arts and cultural community, parents, students, and others to ensure excellence in art education for every student in Chicago public schools.

After a quick stroll to Ingenuity's offices, participants will take an interactive data walk through artlook™ Map, a first-of-its-kind interactive system that allows users to explore, share and use arts education data from arts organizations and CPS schools. With this context, participants will join an interactive discussion with representatives from Ingenuity, local grantmakers and arts organizations to learn how Ingenuity is using data to bridge the gap between nonprofits, communities and grantmakers by creating a shared language and common values, building trust to learn together, and easing the burden of the nonprofit reporting process.

S3. Right on Justice: Using Data to Apply a Racial Equity Lens to Learning

OFF-SITE



RIGHT ON
JUSTICE



Launched in early 2014, Right on Justice is an initiative convened by Communities United, the Adler University Institute on Public Safety and Social Justice, and Woods Fund Chicago. The ROJ alliance envisions justice reinvestment through a racial equity approach in Chicago and beyond, with a mission to halt the school-to-prison pipeline and end mass incarceration of low-income communities of color through community organizing and restorative justice philosophy and practices.

Just a brief stroll across the river, conference participants can extend their learning with an off-site visit to Woods Fund Chicago. Join representatives from Right on Justice and other stakeholders to explore how Right on Justice uses data to apply a racial equity lens to its work and a co-leadership model to build shared learning among partners. Participants will learn the key opportunities and challenges with this model and what is needed at the outset to make the partnership successful.

Reflections from Day 2

What are you taking home with you?

I learned:

I was reminded that:

A new insight or resource I can share with colleagues:

As a result of the conference, I will:

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 6,000 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 only 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 so much more.

Save the date for future GEO conferences:



LEADING CHANGE CONFERENCE 2017

November 13 - 14, 2017

Pittsburgh, Pennsylvania

Priority registration opens to GEO members on Tuesday, July 18, 2017.

2018 NATIONAL CONFERENCE

April 30 - May 2, 2018

San Francisco, California

Priority registration opens to GEO members in January 2018.

Not Yet a GEO Member?

Join the GEO community today!

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

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

Curated Content, Actionable Tools

Whether you're a new or established grantmaker, 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 members.

- 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 listserv, offering instant support and feedback from your grantmaking peers*
- Bimonthly digest packets with information and links to resources related to specific content areas*
- IMPACT, a quarterly e-newsletter that offers actionable steps to smarter grantmaking*
- Discounts on subscriptions to leading publications, including *The Foundation Review*, *Stanford Social Innovation Review*, *The Nonprofit Quarterly*, *Alliance* magazine and more*

**Members only benefit*

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*
- In-person learning opportunities, including workshops focused on key topics (like capacity building, grantee inclusion and change management), as well as long-term cohort programs
- Remote learning opportunities, including our in-depth Remote Learning Series*, member calls* organized by members to lift up questions around specific content, and webinars to support GEO's core smarter grantmaking approaches
- GEO staff, available year round to connect you directly with peers navigating the same journey



GEO conferences consistently receive a 95 percent satisfaction rating from participants.

**Members only benefit*



Notes

Have more thoughts and takeaways than fit on these notes pages?

Use the conference app to take notes within specific conference sessions—just click the pencil icon.

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Notes

Have more thoughts and takeaways than fit on these notes pages?

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Notes

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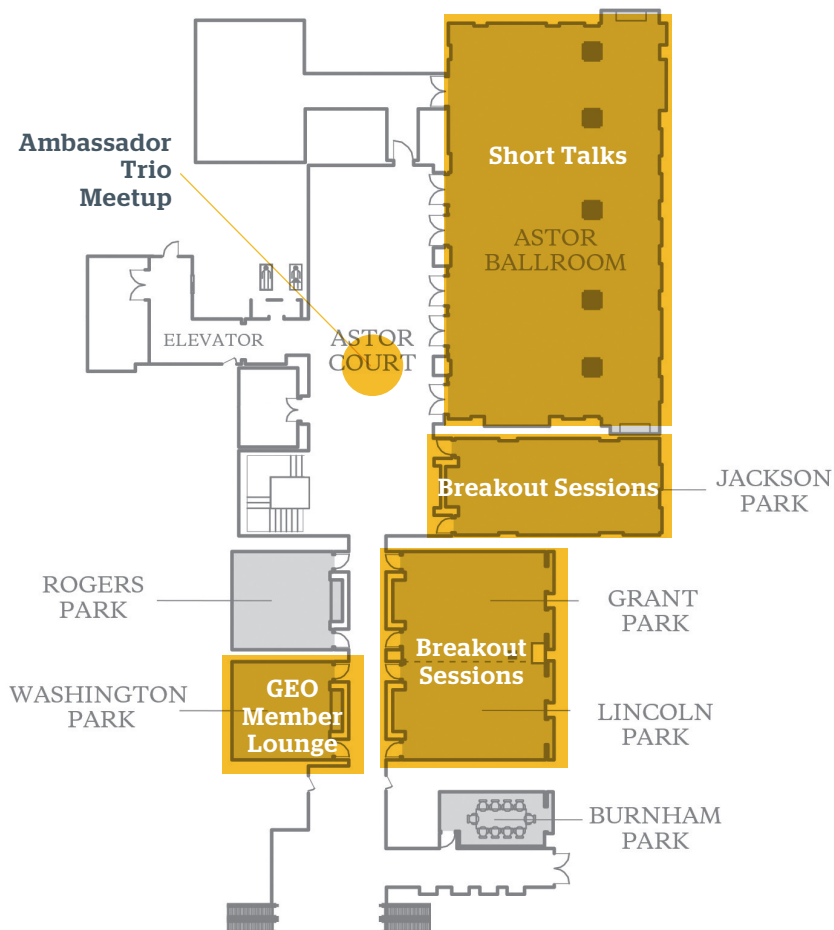
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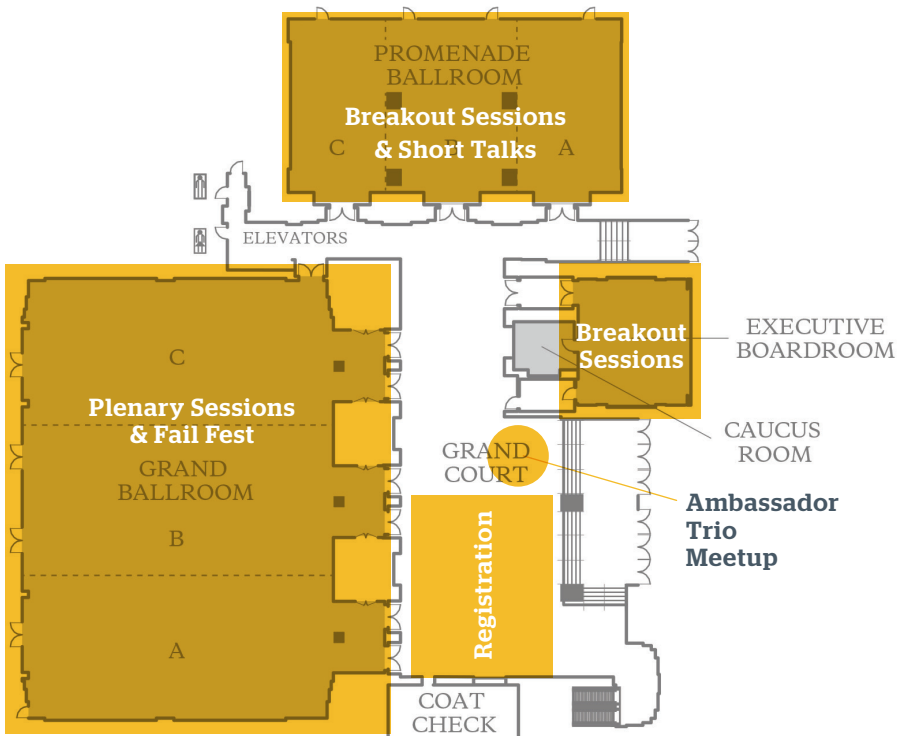
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Floor Plan

River Level One



Floor Plan River Level Two



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BUSH
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Illinois Children's
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