

Held in partnership with Philanthropy California

2018

GEO
NATIONAL
CONFERENCE
SAN FRANCISCO

April 30 - May 2, 2018 | #2018GEO

bit.ly/2018GEO



THIS PROGRAM BELONGS TO: _____



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 6,000 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 California is an initiative of Northern California Grantmakers, San Diego Grantmakers and Southern California Grantmakers. The coalition brings together the three philanthropic networks as a powerful force for change on the issues that affect us all. Our combined membership represents more than 500 foundations, corporate funders, philanthropic individuals and families, giving circles, and government agencies who invest billions every year to support communities across the state, the country, and worldwide. Philanthropy CA taps into the deep regional expertise and connections of funders to increase philanthropy's impact in building and sustaining thriving, equitable communities. Together, we can impact our members, the nonprofits they support and the communities they serve.

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van Loben Sels/RembeRock Foundation

A large, stylized graphic on the left side of the page. It features a dark blue background with a diagonal orange and white stripe. Overlaid on this is a large orange shape containing the year '2018' in a bold, blue, outlined font. The '2018' is positioned in the upper left quadrant of the page.

2018

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Welcome

2018

Welcome to San Francisco for GEO's 2018 National Conference, held in partnership with Philanthropy California. Over 850 grantmakers from the U.S. and around the world are coming together to improve their grantmaking in ways that positively impact nonprofits and their ability to achieve their missions. We are thrilled that you have joined us!



This year we are celebrating GEO's 20th anniversary, and today, just as always, connections with peers who can help us learn and grow will make the difference. While the current context from which we work and live evolves and challenges us, it becomes ever more critical that we develop strategies to be more effective partners to nonprofits. The 2018 National Conference provides a perfect opportunity to deepen our collective capability to share lessons as we are learning them and to follow through on practice changes that give nonprofits what they need to succeed.

While you are here, you will have the opportunity to hear from a broad and diverse selection of voices in a variety of formats. It is our hope that the conference plenaries, workshops, Short Talks, Site Visits and more than 30 breakout sessions designed by members of the GEO community will energize and inspire you. There will also be numerous opportunities outside of the sessions to connect and learn with peers. Our welcome reception at the Exploratorium will provide an evening of networking and discovery. Less formal events – like Active Hours and Dine Arouds – will also take place throughout the conference, providing an opportunity for even more connections.



Please use our time together to witness the power of a community of grantmakers eager to improve, experience the vibrancy of the nonprofit and philanthropic sectors in the region, and help the GEO community celebrate 20 years by exchanging ideas, perspectives and experiences that will propel us forward for many more.

We extend a huge thank-you to our conference supporters, regional partners, planning committee and host committee. This conference would not be possible without your support, hospitality and creative contributions. Thank you for joining us in San Francisco. We hope that you'll walk away with information, connections and experiences that enhance your path to more effective grantmaking.



Kathleen Enright
President and CEO
GEO

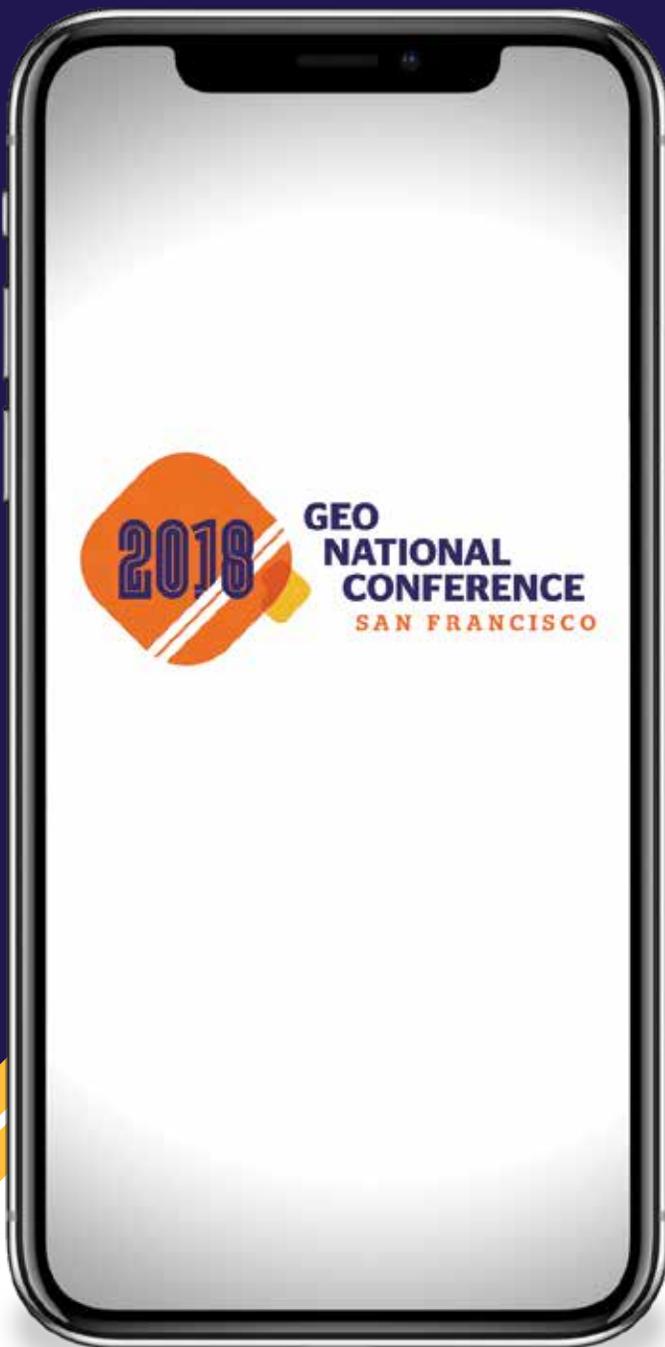


Grace Hou
President
Woods Fund Chicago
Conference Planning
Committee Co-Chair



Stacy Van Gorp
Executive Director
R. J. McElroy Trust
Conference Planning
Committee Co-Chair

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, search the iTunes or Google Play store for “CrowdCompass AttendeeHub.” Once downloaded, search “2018 National Conference” 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.

Community Networking Opportunities

Twitter

#2018GEO

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

@GEOfunders

GEO's Twitter handle; follow it for updates during the conference and for news, resources and opportunities throughout the year.

Bay Area Connect!

Get the most from your San Francisco visit! Connect guides – volunteers from the local grantmaking community – are here to help make your conference experience and visit to San Francisco memorable. Guides are wearing special “I Left My Heart in San Francisco” paraphernalia, so feel free to use them as your local resource!

Peer Gatherings and Discussions

Many participants and affinity groups are gathering fellow conference participants around specific 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.

Member Lounges

Connect with other GEO members in the GEO Member Link Lounge in Market Street Foyer (Street Level). The lounge is open for networking, meetups and refreshments. Regency A (Street Level) is also available if you're looking for a quieter space to check email or relax.

Dine Arounds

Host or join a group of your colleagues for dinner and informal conversation. 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.

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 Click, the scavenger hunt game in the conference app designed to facilitate 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.

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.

THE LOUNGES ARE OPEN:

MONDAY, APRIL 30:
8 A.M. TO 5:30 P.M.

TUESDAY, MAY 1:
8 A.M. TO 5:30 P.M.

WEDNESDAY, MAY 2:
8 A.M. TO 1:30 P.M.

2018

Content Areas

Sessions and activities on the 2018 National Conference schedule fall into content areas identified by GEO staff and members who served on the volunteer conference planning and host committees. The thematic areas represent some of the grantmaking practices that are most supportive of nonprofit success. Content areas are indicated in the program with the following icons:



CAPACITY BUILDING

Explore various ways grantmakers provide effective capacity building support that helps ensure nonprofits have what they need to deliver on their missions. Gain tools for building or strengthening your capacity building programs.



COLLABORATION

Dig into the experiences of collaboration practitioners across a variety of issue areas and contexts. Alongside your peers, wrestle with specific challenges and practices related to funders working in better partnership with each other and to better supporting collaboration amongst our grantees.



CULTURE

Better understand how your role and behaviors reinforce or contradict the culture your organization is trying to create. By working together to understand and tend our cultures, we can build stronger, more inclusive and more effective organizations.



EQUITY

Address the historic, emerging, dynamic and collective forces at work to suppress racial justice. Engage with peers to find more ways to close the gap between your aspirations and your daily actions. No matter the outcome we are working toward, our institutions and systems were built to advantage some but not all – and data show that inequities persist to this day.



FLEXIBLE, RELIABLE FUNDING

Delve into the kinds of support that contribute to strong and effective nonprofit organizations by engaging directly with nonprofit leaders and peer grantmakers. Share what you're learning about general operating support or multi-year funding, and explore how our community can build upon those successes.



LEARNING AND EVALUATION

Discuss how grantmakers can use evaluation and learning to make real-time improvements to our work and nurture a learning culture within our organizations. Explore strategies for learning more collaboratively, ensuring that nonprofits and your partners also have the information they need to drive decisions that enhance their work.



NETWORKING

Make new connections and join up with old friends in activities throughout the conference that will get you moving and networking with other participants. From the Ambassador Program and the Welcome Reception to Active Hours and Dine Arouns, you will deepen your conference experience and leave with peer support to turn new knowledge into action at home.



ORGANIZATIONAL CHANGE

Gain exposure to different vehicles that grantmakers can use to accelerate the pace of change in our work. Learn how real change is possible when our organizations foster innovative and supportive environments where smarter grantmaking practices can thrive.



STRENGTHENING RELATIONSHIPS

Invest in building and sustaining long-term relationships with the nonprofits and communities you serve. Our success as grantmakers is inextricably linked to the strength of our connections with these partners, and if we're going to make progress on some of the most deeply entrenched problems in our society, we must directly address existing power dynamics and create strong, trusting relationships with nonprofits.



SYSTEMS GRANTMAKING

Influence the bigger picture in all of its complexity. Work together with others to strengthen your efforts to be more proactive, strategic, outcomes focused, learning oriented and inclusive – because the daunting problems facing society today are deeply embedded in a web of intractable issues, fragmented relationships and unpredictable events.



Sunday / April 29

REGISTRATION is open from 3:00 – 6:00 p.m. in *Seacliff Foyer (Second Level)*.

4:00 – 6:00 p.m.
EARLY ARRIVERS HAPPY HOUR
Seacliff Foyer (Second Level)

Monday / April 30

REGISTRATION is open from 8:00 a.m. to 6:00 p.m. in *Market Street Foyer (Street Level)*.

THE MEMBER LINK LOUNGE is open from 8:00 a.m. to 5:30 p.m. in *Market Street Foyer (Street Level)* for networking, meetups or refreshments.

THE MEMBER RECHARGE ROOM is open from 8:00 a.m. to 5:30 p.m. in *Regency A (Street Level)* for checking email, grabbing a snack or taking a quick break.

8:30 – 11:30 a.m.

SITE VISITS

(Optional. Advance registration and payment^{\$} are required.)

S1. HOPE SF^{\$}
Off-site

S2. 826 Valencia^{\$}
Off-site

9:30 – 11:30 a.m.

PRE-CONFERENCE WORKSHOPS

(Optional. Advance registration and payment^{\$} are required.)

W1. Confronting Orthodoxies for Equitable Evaluation Practice^{\$}
Pacific NO (Concourse Level)

W2. Preparing Nonprofits to Weather Storms and Respond to Threats^{\$}
Pacific LM (Concourse Level)

W3. Building a Race Equity Culture^{\$}
Pacific HI (Concourse Level)

W4. Jump-Start Your Conference and Tap into the GEO Community
Pacific FG (Concourse Level)

12:00 – 2:00 p.m.

OPENING SESSION LUNCHEON: THE GEO COMMUNITY AT 20 – TAKING STOCK AND LOOKING AHEAD

Grand Ballroom (Street Level)

2:00 – 2:30 p.m.
BREAK

2:30 – 3:45 p.m.

BREAKOUT SESSIONS ROUND A

(Select one of 10 options.)

A1. Maximizing Grantee Impact and Partnership through Foundation Operations
Seacliff AB (Bay Level)

A2. Social Movement Mapping in Philanthropy
Seacliff CD (Bay Level)

A3. Capacity Building in a Time of Dramatic Policy Change
Bayview A (Bay Level)

A4. Incubating Impact by Embracing the Process of Change
Bayview B (Bay Level)

A5. Learning from 15 Years of General Operating Support Grantmaking
Pacific DE (Concourse Level)

A6. What's Next? Preparing Executive Director Transitions for Organizational Success
Pacific FG (Concourse Level)

A7. Designing Reflective Learning Sessions to Make Learning Actionable
Pacific HI (Concourse Level)

A8. Understanding the Role that Foundations Play in Civic Engagement
Pacific JK (Concourse Level)

A9. Seeding Change by Working Together Toward Greater Diversity, Equity and Inclusion
Pacific LM (Concourse Level)

A10. Practical Keys to Developing and Maintaining Strong Funder-Grantee Relationships
Pacific NO (Concourse Level)

4:00 – 5:30 p.m.

ACTIVE HOUR

(Optional. Advance registration is required.)

5:30 – 7:30 p.m.

WELCOME RECEPTION AT EXPLORATORIUM

Off-site

Tuesday / May 1

REGISTRATION is open from 8:00 a.m. to 6:00 p.m. in *Market Street Foyer (Street Level)*.

THE MEMBER LINK LOUNGE is open from 8:00 a.m. to 5:30 p.m. in *Market Street Foyer (Street Level)* for networking, meetups or refreshments.

THE MEMBER RECHARGE ROOM is open from 8:00 a.m. to 5:30 p.m. in *Regency A (Street Level)* for checking email, grabbing a snack or taking a quick break.



Tuesday / May 1 continued

6:30 - 7:30 a.m.
ACTIVE HOUR
(Optional. Advance registration is required.)

8:00 - 9:00 a.m.
NETWORKING BREAKFAST
Grand Ballroom (Street Level)

8:30 - 10:45 a.m.
SITE VISITS
(Optional. Advance registration and payment^s are required.)

S3. CAST and Women's Audio Mission^s
Off-site

9:15 - 10:30 a.m.
BREAKOUT SESSIONS ROUND B
(Select one of 10 options.)

B1. Examining Your Foundation's Openness Practices
Seacliff AB (Bay Level)

B2. Using Strategic Financial Knowledge as a Platform to Flexible Grantmaking
Pacific LM (Concourse Level)

B3. Collaboratively Supporting Grantees to Center Racial Equity
Bayview A (Bay Level)

B4. Surrendering Your Power to Learn from Community
Bayview B (Bay Level)

B5. Responding to Capacity Building Needs in Your Community
Pacific DE (Concourse Level)

B6. Tackling Police Accountability System Change Through Cross-sector Collaboration
Pacific FG (Concourse Level)

B7. Embedding Learning into the Way We Work
Pacific HI (Concourse Level)

B8. Transforming Grantmaking Practice to Improve the Lives of People and Families
Pacific JK (Concourse Level)

B9. Supporting Advocacy during Turbulent Times
Seacliff CD (Bay Level)

B10. Ensuring Enduring Positive Change by Advancing Equity
Pacific NO (Concourse Level)

10:30 - 11:00 a.m.
BREAK

11:00 a.m. - 12:15 p.m.
BREAKOUT SESSIONS ROUND C
(Select one of 10 options.)

C1. How a Global Learning Strategy Improves Grantmaking in the U.S.
Seacliff AB (Bay Level)

C2. Creating an Inclusive Culture One Step at a Time
Seacliff CD (Bay Level)

C3. Incorporating Beneficiary Voice in Decision-Making
Bayview A (Bay Level)

C4. Strengthening Nonprofits as a Social Justice Strategy
Bayview B (Bay Level)

C5. Building a Culture of Learning for Continuous Improvement
Pacific DE (Concourse Level)

C6. Philanthropy's Role in Closing the Nonprofit Racial Leadership Gap
Pacific FG (Concourse Level)

C7. Building a Collaborative Institutional Culture for Community Engagement
Pacific HI (Concourse Level)

C8. Engaging Boards and Trustees in Learning and Evaluation
Pacific JK (Concourse Level)

C9. Working with Intermediaries for Scalable and Sustainable Transformation
Pacific LM (Concourse Level)

C10. Managing Risk in Philanthropy
Pacific NO (Concourse Level)

12:30 - 2:30 p.m.
PLENARY LUNCHEON: FUNDING FOR JUSTICE AND CHANGE
Grand Ballroom (Street Level)

2:30 - 3:00 p.m.
BREAK



3:00 – 4:45 p.m.

SHORT TALKS**Round 1 | 3:00 – 3:25 p.m.**

- 1A.** Vulnerability and Failure are the Keys to Scale Impact – Ben Mangan, Haas School of Business, University of California, Berkeley
Seacliff ABCD (Bay Level)
- 1B.** Using Restorative Justice to Transform Racialized Historical Harm in the U.S. – Fania Davis, Restorative Justice for Oakland Youth
Pacific FGHI (Concourse Level)
- 1C.** Inclusive Grantmaking Requires Shattering Norms – Christina Canales Gorczyński, The Simmons Foundation
Pacific LMNO (Concourse Level)

Round 2 | 3:40 – 4:05 p.m.

- 2A.** Our 21st-Century Democracy – Keesha Gaskins-Nathan, Rockefeller Brothers Fund
Seacliff ABCD (Bay Level)
- 2B.** Automating Austerity – Virginia Eubanks, University at Albany, SUNY
Pacific FGHI (Concourse Level)
- 2C.** Creating Space for Systems Change – Raj Jayadev, Silicon Valley De-Bug
Pacific LMNO (Concourse Level)

Round C | 4:20 – 4:45 p.m.

- 3A.** Building Collective Power in Indigenous Communities – Nick Tilsen, Thunder Valley Community Development Corporation
Seacliff ABCD (Bay Level)
- 3B.** Stories as Catalysts for Widespread Change – Bridgit Antoinette Evans, Pop Culture Collaborative
Pacific FGHI (Concourse Level)
- 3C.** The Implications of Implicit Bias – Rodolfo Mendoza-Denton, University of California, Berkeley
Pacific LMNO (Concourse Level)

5:00 – 6:00 p.m.

SOCIAL HOUR WITH SHORT TALK SPEAKERS*Seacliff Foyer (Street Level)*

6:00 – 8:00 p.m.

CEO AND TRUSTEE RECEPTION*(Invitation Only)*

7:00 – 9:00 p.m.

DINE AROUNDS*(Optional. Advance registration is required.)*

Wednesday / May 2

REGISTRATION is open from 8:00 a.m. to 2:00 p.m. in *Market Street Foyer (Street Level)*.**THE MEMBER LINK LOUNGE** is open from 8:00 a.m. to 1:30 p.m. in *Market Street Foyer (Street Level)* for networking, meetups or refreshments.**THE MEMBER RECHARGE ROOM** is open from 8:00 a.m. to 1:30 p.m. in *Regency A (Street Level)* for checking email, grabbing a snack or taking a quick break.

6:30 – 7:30 a.m.

ACTIVE HOUR*(Optional. Advance registration is required.)*

8:30 – 10:00 a.m.

PLENARY BREAKFAST: CENTERING PHILANTHROPIC CHANGE IN COMMUNITY*Grand Ballroom (Street Level)*

10:15 – 11:30 a.m.

BREAKOUT SESSIONS ROUND D*(Select one of 8 options.)*
D1. Uncovering Capacity Building Needs for Diverse Communities
Seacliff AB (Bay Level)
D2. Using Rapid-response Collaboration to Protect the Social Safety Net
Pacific JK (Concourse Level)
D3. Leveraging Networks for Community Change
Bayview A (Bay Level)
D4. Building Grantees' Capacity for Diversity, Equity and Inclusion Work
Pacific FG (Concourse Level)
D5. Learning from and Applying a Full Cost Approach
Pacific HI (Concourse Level)
D6. When Is Collective Impact Most Impactful?
Seacliff CD (Bay Level)
D7. Strategies for Engaging Young People in Social Change
Pacific LM (Concourse Level)
D8. Learning and Evaluation that Matches the Complexity of Systems Change
Pacific NO (Concourse Level)

11:45 – 1:15 p.m.

CLOSING SESSION: POWER AND THE FUTURE OF PHILANTHROPY*Grand Ballroom (Street Level)*



20th

Anniversary

This year, the GEO community celebrates 20 years of making meaningful progress together. It's a moment for recognizing the

fundamental power of community – a moment for remembering how much grantmakers have achieved, and can achieve, when we work together.

Since 1998 GEO has been a community that has challenged each other to think differently, focused intently on what matters most to nonprofits' success, and supported one another in implementing smarter grantmaking practices.

Thank you to GEO's founders:

As we celebrate what our community has accomplished, we want to acknowledge and thank those who have exhibited leadership – from our founders and initial steering committee members to past and current board members. You have helped GEO become the community it is today and will be for the future.



James E. Canales
President
Barr Foundation



Barbara Kibbe
Director,
Organizational Effectiveness
S.D. Bechtel, Jr. Foundation



Janine Lee
President and CEO
Southeastern Council
of Foundations

Thank you to past and current steering committee and board members:

James Abernathy
Formerly of Environmental Support Center

Fred Ali
Weingart Foundation

Carrie Avery
The Durfee Foundation

John Bare
The Arthur M. Blank Family Foundation

Gregg Behr
The Grable Foundation

Beth Bruner
Formerly of Bruner Foundation

Imani Constance Burnett
Formerly of Southeastern Council of Foundations

Marty Campbell
Formerly of the James Irvine Foundation

Hanh Cao Yu
The California Endowment

Chris Cardona
Ford Foundation

Roberto Cremonini
Formerly of Barr Foundation

Don Crocker
Support Center for Nonprofit Management | Partnership in Philanthropy

Liza Culick
Formerly of Community Foundation of Santa Cruz County

Sylvia de Haas-Phillips
Formerly of Hartford Foundation for Public Giving

Lisa Eisen
Charles and Lynn Schusterman Family Foundation

Diana Gurieva
Formerly of the Dyson Foundation

Mary MacIntyre Hamilton
Formerly of The Fieldstone Foundation

Frances Hansford
Formerly of W.K. Kellogg Foundation

Sidney Hargro
Philanthropy Network Greater Philadelphia

Annie Hernandez
eXtension Foundation, formerly of the Frieda C. Fox Family Foundation

Mary Ann Holohean
Formerly of Eugene and Agnes E. Meyer Foundation

Mae Hong
Rockefeller Philanthropy Advisors

David Hunter
Formerly of the Edna McConnell Clark Foundation

Irene Ibarra
Formerly of the Colorado Trust

Thomas Kelly
Hawai'i Community Foundation

Daniel Lee
Levi Strauss Foundation

Amira Leifer
Formerly of Surdna Foundation

Philip Li
Robert Sterling Clark Foundation

Valerie Lies
Formerly of Forefront

Handy Lindsey
Ruth Mott Foundation

Peter Long
Blue Shield of California Foundation

Robert Long
Formerly of W.K. Kellogg Foundation

Dara Major
Formerly of Surdna Foundation

Michael McCoy
Meadows Foundation

Laura McGrath
Formerly of Fannie Mae Foundation

Glenn McRae
Formerly of the Vermont Community Foundation

Clara Miller
Formerly of the F.B. Heron Foundation and Nonprofit Finance Fund

Ricardo Millet
Formerly of Woods Fund Chicago

Mary Mountcastle
Z. Smith Reynolds Foundation

Kelly Nowlin
Surdna Foundation

Grant Oliphant
The Heinz Endowments

Edward Pauly
The Wallace Foundation

Carrie Pickett-Erway
Kalamazoo Community Foundation

Jim Pitofsky
John Templeton Foundation, formerly of SeaChange

Kathy Reich
Ford Foundation

Tom Reis
Formerly of W.K. Kellogg Foundation

Annemarie Riemer
Hartford Foundation for Public Giving

Albert Ruesga
Formerly of Greater New Orleans Foundation

Paul Shoemaker
Formerly of Social Venture Partners Seattle

Eric Sloan
Formerly of Charles and Helen Schwab Foundation

LaTida Smith
Moses Taylor Foundation

Rob Stuart
Formerly of Rockefeller Technology Project

Natasha Terk
Formerly of the David and Lucile Packard Foundation

Melinda Tuan
Fund for Shared Insight, formerly of REDF

Mary Walachy
Irene E. & George A. Davis Foundation

Suzanne Walsh
Bill & Melinda Gates Foundation, formerly of the Lumina Foundation

Rick Williams
Sobrato Family Foundation, formerly of Charles and Helen Schwab Foundation

Gayle Williams
Formerly of Mary Reynolds Babcock Foundation

Starsky Wilson
Deaconess Foundation

Susan Zepeda
Community Foundation of Louisville, formerly of Foundation for a Healthy Kentucky

20th

Favorite Moments

I have enjoyed serving as a capacity building champion - the opportunity has put me in touch with GEO Members I did not know and from whose work I have learned a lot.

- Teresa Crawford, Counterpart International

I first attended a GEO conference in 2008, and I was blown away by the quality of the conference and the community.

- Amy Kleine, Harry and Jeanette Weinberg Foundation

The amazing keynote speakers panel at the 2016 National Conference in Minneapolis. Talking about race, anger, forgiveness and the struggle of black men was enlightening. I learned, felt energized and inspired to do more. How much more can you ask for from a conference?

- Sasha Rabsey, HOW Fund

BEING A MEMBER OF THE GEO BOARD FOR 2 TERMS. IT WAS LIFE- AND WORK-CHANGING. I WAS A BETTER GRANTMAKER, FOUNDATION LEADER AND NONPROFIT BOARD MEMBER AS A RESULT OF THAT EXPERIENCE. I WISH I COULD STAY ON THE GEO BOARD FOREVER!

- Suzanne Walsh, Bill & Melinda Gates Foundation

I am new to the field and look forward to making memories with the GEO community.

- Laila Bell, The Duke Endowment

The merger of GEO with Grantmakers Evaluation Network was an important milestone. GEO has been a leader in helping philanthropy to better understand and support what works in the social sector.

- Marci Lu, William J. and Dorothy K. O'Neill Foundation

I loved being a part of the 2017 Learning Mindset remote learning series! It was a great learning experience.

- Maggie Martinelli, Scranton Area Community Foundation

GEO's convening of vice presidents last year in NYC. It was amazing to connect with a small group of peers who were facing the same challenges and opportunities as me.

- Edgar Villanueva, Schott Foundation for Public Education

One of the first receptions after GEO was created, in a tiny basement room in a huge conference center during the Council on Foundations' annual conference.

- Christine Elbel, Fleishhacker Foundation

I learned how to Tweet at GEO!

@vic_thinks

- Victoria Dunning, Ford Foundation

Participating in the Change Leaders in Philanthropy Fellowship program is one of my favorite GEO experiences and all-time career highlights. It continues to be an amazing supportive community. I am very fortunate to be a part of it.

- Danielle Breslin, Blue Cross and Blue Shield of North Carolina Foundation

My first conference last year was wonderful. I am less than one year into the experience of working in a foundation, and learning experiences like these are helping to propel me forward on a good path.

- Sabrina Thornton, T. Rowe Price Foundation, Inc.

Hopes & Aspirations for the Future

I would like to see philanthropy play a more meaningful role in building a fair, just and equitable society.

- Aaron Dorfman, National Committee for Responsive Philanthropy

I'd like to see philanthropy move beyond silos (approaching funding strategies individually, having variable practices, etc.) and work together and with grantees to make the world a better place.

- Michelle Greanias, PEAK Grantmaking

I would like to see philanthropy fully embrace the role it has to play in advancing equity across all policies and decreasing the injustice of economic inequities Americans face today.

- Naaima Khan, Bush Foundation

GEO can become even more of a hub for capacity building to bring people together to learn together.

- Emily Dwyer, The David and Lucile Packard Foundation

I'd like to see more collective impact partnerships, with public, private, and community funders all coming together on shared goals.

- Nate Nasralla, Network for Good

To have much better representation of DIVERSE leaders in the room, especially at all foundation meetings and panels, and where we pay much closer attention to the role of culture in advancing our organization's work and mission.

- Tina Eshaghpour, The California Wellness Foundation

I'd like to see more philanthropic organizations using their voice, along with their dollars, to influence systemic change.

- Chera Reid, The Kresge Foundation

I'd like to see the leadership (board and staff) of philanthropy — including philanthropy support orgs like GEO and grantmaking institutions like GEO's members — be more inclusive and representative of individuals that reflect the diverse racial and ethnic identities and lived experiences of the residents of our communities and our country.

- Hanh Le, Weissberg Foundation

Partnering with nonprofits more deeply; listening and co-creating community level initiatives or ideally following the community - not creating funder "bright idea" initiatives. Just listening, following and supporting.

- Deborah Linnell, van Beuren Charitable Foundation

Would like to see philanthropy's impact multiply geometrically and for us to be able to tell its stories extremely well.

- Kimberly Allen, Wells Fargo Regional Foundation



Exploring San Francisco and the Bay Area

Are you extending your visit or looking for opportunities to explore the many sights and experiences of the Bay Area? Consider visiting these local attractions – recommendations from our host committee – to get a better taste of our host city. You can also visit the conference registration desk for more information on local attractions and downtown dining options.

Golden Gate Park

One of the most visited parks in the United States, this city escape is filled with a number of things to do and see – from joining a Segway or biking tour to wandering its many gardens and museums. Be sure to visit the Japanese Tea House and Garden, the de Young Museum and the San Francisco Botanical Garden, some of the park's most iconic attractions. Visit goldengatepark.com for more information.

Marina District and Crissy Field

Located on the city's northern shore, the Marina District neighborhood is full of restaurants and bars. Check out Fort Mason, a multifaceted arts complex, or watch a performing arts show at the Palace of Fine Arts Theatre. If you're feeling adventurous, walk along the waterfront pathway to the Warming Hut Bookstore & Café, known for its expansive views of Golden Gate Bridge and the San Francisco Bay. This walk from the Marina District is approximately 2 ½ miles each way.

Museums and Cultural Experiences

San Francisco is home to some of the country's best museums and cultural experiences. Visit the recently renovated SFMOMA – the San Francisco Museum of Modern Art – or join a Chinatown walking tour with the Chinese Culture Center of San Francisco. The Yerba Buena Center for the Arts also offers a more multifaceted arts experience, placing equal emphasis on visual arts, performing arts, the art of film and their intersection with civic engagement. Visit sftravel.com/explore/arts-culture for more information on these and other arts and culture attractions.

Muir Woods National Monument

Known for its towering redwood trees, Muir Woods National Monument offers you the chance to see more than just downtown San Francisco. Federally protected as a national monument since 1908, this forest escape is part of the Golden Gate National Recreation Area – a diverse range of natural and cultural sites extending across San Mateo, San Francisco and Marin counties. Reservations are required to visit Muir Woods – nps.gov/muwo/planyourvisit/index.htm offers more information.



4:00 - 6:00 p.m.

EARLY ARRIVERS HAPPY HOUR

Location: Seacliff Foyer (Bay Level)

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

Monday /
April 30

8:30 – 11:30 a.m.

NONPROFIT SITE VISITS

(Optional. Advance registration and payment^{\$} are required.)

Space is limited, so reserve your spot early for Site Visits happening on Monday, April 30, and Tuesday, May 1.

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 get an insider's perspective on the work these organizations are doing and hear firsthand how certain grantmaking practices affect these grantees.



S1. HOPE SF^{\$}

Location: Off-site (Please meet in Market Street Foyer.)

San Francisco's **HOPE SF** Initiative is the city's signature anti-poverty and equity initiative, linking the creation of mixed-income communities with systems changes designed to promote economic mobility

and community wellness. Managed as a collective impact initiative, HOPE SF is transforming four of the most historically isolated and dilapidated public housing communities in the nation. Unlike prior redevelopment efforts that have largely displaced the existing population, HOPE SF is committed to the 5,000 current residents and to preserving the racial and economic

diversity of San Francisco. The initiative seeks to break intergenerational patterns of trauma and poverty through deep investments in the hallmarks of vibrant communities – quality affordable housing, resident leadership and social cohesion, health and wellness supports, and mobility pathways through education and workforce development. During this visit, you'll tour three HOPE SF sites and learn how this public-philanthropic partnership seeks to equitably transform communities by engaging current residents and investing in broad-scale community development.



S2. 826 Valencia^{\$}

Location: Off-site (Please meet in Market Street Foyer.)

826 Valencia is a nonprofit dedicated to supporting under-resourced students with their creative and expository writing skills and to helping teachers inspire their students to write. Their new space in the Tenderloin neighborhood provides tutoring, writing, publishing and podcasting programs, as well as a storefront called King Carl's Emporium, named after a mysterious royal pufferfish. During this visit, you'll learn how 826 Valencia mixes play and purpose to promote literacy, and hear about the vital role that funders from the **Panta Rhea Foundation** and **Rockefeller Philanthropy Advisors** have played in supporting the various types of nonprofit capacity needed for success.



9:30 – 11:30 a.m.

PRE-CONFERENCE WORKSHOPS

(Optional. Advance registration and payment^s are required.)



W1. Confronting Orthodoxies for Equitable Evaluation Practice^s



*Session Designer: Jara Dean-Coffey, Luminare Group
Location: Pacific NO (Concourse Level)*

This session will review emerging principles of equitable evaluation and share a set of orthodoxies that are barriers to its adoption in a philanthropic setting. You will engage with the orthodoxies, critiquing the ways that current evaluation practice in your organization and the field at large gets in the way of equitable evaluation. In a gallery walk of equitable evaluation principles, you will have the opportunity to see the ways in which other foundations are evolving their evaluation efforts, allowing you and other participants to self-organize around orthodoxies and equitable evaluation principles. Finally, we'll develop preliminary strategies to address orthodoxies within your own foundations as well as create mini practice groups to advance the work post-session.

Speakers:

- Teri Behrens, Ph.D., Dorothy A. Johnson Center for Philanthropy, @TeriBehrens
- Jara Dean-Coffey, Luminare Group, @jdeancoffey, @luminaregroup
- Chera Reid, Ph.D., The Kresge Foundation, @kresgefdn



W2. Preparing Nonprofits to Weather Storms and Respond to Threats^s

*Session Designers: Emily Goldfarb, RoadMap, and Margi Clarke, RoadMap
Location: Pacific LM (Concourse Level)*

The frequency and severity of threats to both nonprofits and foundations are increasing. To address the increase in hate crimes, harassment of activists, digital hacking, surveillance and government audits, organizations will need the appropriate tools to understand and protect against these risks. While many social justice groups have faced similar pressures in the past, the opposition is better organized and more sophisticated than ever, and funders are also increasingly in “the eye of the storm.” This workshop will guide you through the creation of a draft plan to protect your foundation and the nonprofits

you support by focusing on risk assessment, crisis management planning and crisis communications responses to opposition attacks.

Speakers:

- Margi Clarke, RoadMap
- Monique Mehta, RoadMap
- Jessamyn Sabbag, Oakland Rising



W3. Building a Race Equity Culture^s



*Session Designer: Kerrien Rollins Suarez, Equity in the Center, ProInspire
Location: Pacific HI (Concourse Level)*

To foster and influence equitable opportunities within your foundation and community, you will need to deepen your understanding of the process for culture change and best practices in the field. In this session, Equity in the Center will share their own best practice research and tools as well as the Equity Cycle framework for culture change so that you can explore transferable insights and tools to take back to your organization and communities. You will learn from and connect with peers who can serve as thought partners and allies beyond the session and identify one or two clear actions you can take in championing race equity and inclusion within your funding organization and in your work with nonprofits and partners.

Speakers:

- Monisha Kapila, ProInspire, @monishakapila
- Andrew Plumley, Equity in the Center, ProInspire, @equityinthctr
- Kerrien Rollins Suarez, Equity in the Center, ProInspire, @equityinthctr, @klrs98



W4. Jump-Start Your Conference and Tap into the GEO Community

*Session Designer: Jason Twiss, GEO
Location: Pacific FG (Concourse Level)*

GEO's diverse community of more than 600 organizations is powered by grantmakers striving to do better. The community turns a hunger for more effective philanthropy into clear pathways for achieving it by helping each other: find clarity on which grantmaking practices matter most to nonprofits; find insights to make faster progress on the issues you care most about; and find support from others working

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to push the boundaries of philanthropy. Join this workshop to learn more about all the ways you can tap into the power of the GEO community, create your own learning agenda to maximize your overall conference experience and engage in a speed networking session to meet like-minded peers.

Speakers:

- Austin Frizzell, GEO
- Allison Punch, GEO
- Jason Twiss, GEO

12:00 – 2:00 p.m.

OPENING SESSION LUNCHEON: THE GEO COMMUNITY AT 20 – TAKING STOCK AND LOOKING AHEAD

Location: Grand Ballroom (Street Level)

Over the last 20 years, the GEO community has worked to transform a desire for results into real improvements by creating spaces where grantmakers learn together and use that learning to drive concrete changes in the way grantmaking work gets done. As a field, we've made progress. And, as we continue learning together, our understanding of effective philanthropy evolves.

In this session, we'll reflect on questions like: What is our vision for the future of philanthropy? How can we lead change toward the progress we want to see as individuals, organizations and a community? We'll explore different perspectives about the impact we've had in the last two decades, the opportunities for us all to lead change in the sector and the future that we can only create by working together.

Introductory Remarks:



Judy Belk, The California Wellness Foundation, @CEO_CalWellness



Carol Larson, The David and Lucile Packard Foundation, @PackardFdn



Janine Lee, Southeastern Council of Foundations, @JanineLeeSECF

Speakers:



Brian Barnes, TandemEd



Kathleen Enright, GEO, @enrightGEO



Pia Infante, The Whitman Institute, @PiaVision



Kathy Reich, Ford Foundation, @kdreich

2:00 – 2:30 p.m.
BREAK

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

2:30 – 3:45 p.m.

BREAKOUT SESSIONS ROUND A

(Select one of 10 options.)



A1. Maximizing Grantee Impact and Partnership through Foundation Operations

Session Designer: Nadia Alia, The Tow Foundation

Location: Seacliff AB (Bay Level)

Universally, foundations must conduct business with nonprofit organizations. In this session, we'll focus on how philanthropic operations can support you in building genuine relationships with grantee partners to encourage honest feedback. We will use real-world examples to explore what it means to adopt a partnership approach with nonprofits, without being prescriptive. You will have an opportunity to reflect on your organizational culture and operations, and how these can be "tweaked" to better enable your grantees' effectiveness as social change agents.

Speakers:

- Nadia Alia, The Tow Foundation, @nadiatowfdn
- Caitlin Johnson, SparkAction, @sparkaction



 **A2. Social Movement Mapping for Philanthropy**
Session Designer: Johanna Morariu, Innovation Network
Location: Seacliff CD (Bay Level)

Social movements are a fundamental pathway for social and political change. Current events and the increased urgency of common threats are catalyzing movement activity and reinvigorating philanthropy's interest in social movements. As funders provide support to social movements, they need approaches and tools that are rigorous, appropriate, and practical. In this interactive session, we immerse you in a detailed model of a movement cycle that will enhance your understanding of social movements and allow you to assess critically how your funding supports social movements. This session will spark new ways of thinking about social movement philanthropy.

Speakers:

- Olivia Deich, The David and Lucile Packard Foundation
- Cicia Lee, Momentum
- Johanna Morariu, Innovation Network

 **A3. Capacity Building in a Time of Dramatic Policy Change**
Session Designers: Rachel Baker, Evelyn & Walter Haas, Jr. Fund, and Linda Baker, The David and Lucile Packard Foundation
Location: Bayview A (Bay Level)

After dramatic federal changes, organizations are facing a volatile policy environment and shifting demand for services. These changes present new challenges and opportunities because while many organizations have received additional program funding, very little of that support has been directed to emerging leadership and capacity needs. One nonprofit leader explains, "Everyone is asking about program priorities but no one has asked what we need to support our organizations internally." In this highly interactive session, you will hear how the volatile policy environment is creating new leadership and capacity challenges and develop new ideas for how to respond with innovative capacity building support.

Speakers:

- Cynthia Buiza, California Immigrant Policy Center
- Holly Delany Cole, Evelyn & Walter Haas, Jr. Fund
- Paula Morris, Rockefeller Philanthropy Advisors, @pauladpm

 **A4. Incubating Impact by Embracing the Process of Change**
Session Designer: Emily Bolton, Social Finance
Location: Bayview B (Bay Level)

Understanding the process of change is central to creating social transformation within situations of complexity. In this interactive session, you will explore how to build innovative collaborations drawing insights from the experience of the Impact Incubator, a collaboration of British foundations working with Social Finance to tackle social problems. The Impact Incubator has developed four different transformative models to address issues including black mental health inequalities, young people leaving the state care system, refugee integration and perpetrators of domestic abuse. We will share our insights, tools and practical experiences to allow you to explore methods for creating a common vision between unlikely partners and design a collaborative response.

Speakers:

- Emily Bolton, Social Finance, @socfinuk
- Julian Corner, Lankelly Chase, @lankellychase
- Faiza Khan, Paul Hamlyn Foundation

 **A5. Learning from 15 Years of General Operating Support Grantmaking**
Session Designer: Maggie Hobstetter, Sobrato Family Foundation
Location: Pacific DE (Concourse Level)

Silicon Valley is known for innovation and economic growth, but many opportunities remain out of reach for most residents. The Sobrato Family Foundation has a long-term commitment to promoting economic opportunity for all of Silicon Valley's residents and providing core support to nonprofits. The Foundation recently commissioned its first-ever retrospective assessment of 15 years of general operating support grantmaking. In this session, hear how the foundation approached this assessment, what they learned, and engage with others in the GEO community in an exercise to consider what success looks like for a general operating support program, and how funders can more effectively support grantees through unrestricted funding.

Speakers:

- Aimée Fribourg, Harder+Company Community Research, @HarderCo, @aimiejmf
- Camille Llanes-Fontanilla, SOMOS Mayfair
- Kenji Treanor, Sobrato Family Foundation, @Sobrato_org



A6. What's Next? Preparing Executive Director Transitions for Organizational Success

Session Designer: Carrie Avery, The Durfee Foundation
Location: Pacific FG (Concourse Level)

It is an open secret in the nonprofit sector that organizations need to engage in succession planning, but few are doing it, or doing it well. This is especially critical now, when a tsunami of baby boomer executive directors are retiring from longtime leadership. What's the holdup? The truth is that leadership transitions present an overwhelming number of tricky issues, both personal to executive directors and organizational to nonprofit staff and their boards. In this session, you will learn creative strategies to normalize succession and sustainability planning, and think about how the sector can restructure nonprofit leadership and promote diversity, equity and inclusion in the next wave.

Speakers:

- Pam David, Northern California Grantmakers
- Marianne Hughes, TSNE MissionWorks
- Margaret Martinez, Community Health Alliance of Pasadena (ChapCare)

A7. Designing Reflective Learning Sessions to Make Learning Actionable

Session Designer: Manuel Fierro, First 5 LA
Location: Pacific HI (Concourse Level)

Retrospectively, vision is 20/20. In spite of that, staff don't always carve out the time to reflect upon previous work. However, intentionally taking time to reflect and learn from past experiences can help you make smarter future decisions. Come learn how to design an interactive, structured reflective session so you and your colleagues can pause, reflect and identify collectively what worked well, didn't work well, and the reasons why. You will design a reflective learning session based on a specific scenario in this session, which will also provide tips, templates, tools and processes to help staff reflect upon their work together and use those collective insights to prioritize areas of improvement and design.

Speakers:

- Manuel Fierro, First 5 LA
- Daniela Pineda, First 5 LA

A8. Understanding the Role that Foundations Play in Civic Engagement

Session Designer: Elina Alterman, Kansas Health Foundation
Location: Pacific JK (Concourse Level)

In this session, you will gain an understanding of integrated voter engagement and explore roles you and other foundations can play in increasing the civic participation of people of color, immigrants, youth, and other historically marginalized communities in public policy decision-making and systems change. Using the perspective of foundations and nonprofits in real-life examples from California and Kansas, we will demonstrate the value of community organizing, issue campaigns, integrated voter engagement, and the incorporation of those strategies in addressing inequitable systems. You will leave with an understanding of strategies for beginning to fund civic engagement while minimizing pushback.

Speakers:

- Elina Alterman, Kansas Health Foundation
- Kristen Campbell, Philanthropy for Active Civic Engagement (PACE), @pacefunders
- Karla Zombro, California Calls

A9. Seeding Change by Working Together Toward Greater Diversity, Equity and Inclusion

Session Designer: Jennifer Aronson, The Boston Foundation
Location: Pacific LM (Concourse Level)

By many counts, we are at the most progressive time in U.S. history, yet this moment is simultaneously characterized by systemic inequity, exclusion and racism. As leaders within an urban community foundation, we see these dynamics play out daily and are responding with the development and implementation of an explicit diversity, equity and inclusion (DEI) lens that encompasses not just what we do, but how we do it. In this session, we'll share our framework for creating momentum for organizational change and how we have leveraged our public platform to confront the roles that systemic forces play in our past, current and future reality. This session will give you an opportunity to examine your values and personal relationships to DEI work and identify key leverage points for cultural change within your organization.

Speakers:

- Jennifer Aronson, The Boston Foundation
- Natanja Craig, The Boston Foundation
- Orlando Watkins, The Boston Foundation



A10. Practical Keys to Developing and Maintaining Strong Funder-Grantee Relationships

Session Designer: Jennifer Glickman, The Center for Effective Philanthropy

Location: Pacific NO (Concourse Level)

This session will explore the areas found to be most influential to positive funder-grantee relationships in research from the Center for Effective Philanthropy. By exploring these areas: understanding, transparency, the grant selection process, and openness to feedback from grantees about strategy, you'll dig into the data behind positive relationships, hear from two program officers highlighted as exemplars in CEP's research, and collaborate with your peers to develop individualized action plans that integrate that research into your work. You will leave the session with new connections, new insights, and, most importantly, practical methods to enhance your relationships.

Speakers:

- Jennifer Glickman, Center for Effective Philanthropy, @JenGlickman
- Irfan Hasan, The New York Community Trust, @irfanNYCT
- Sarah Lovan, The McKnight Foundation

4:00 - 5:30 p.m. ACTIVE HOUR: WALKING TOUR

(Optional. Advance registration is required.)

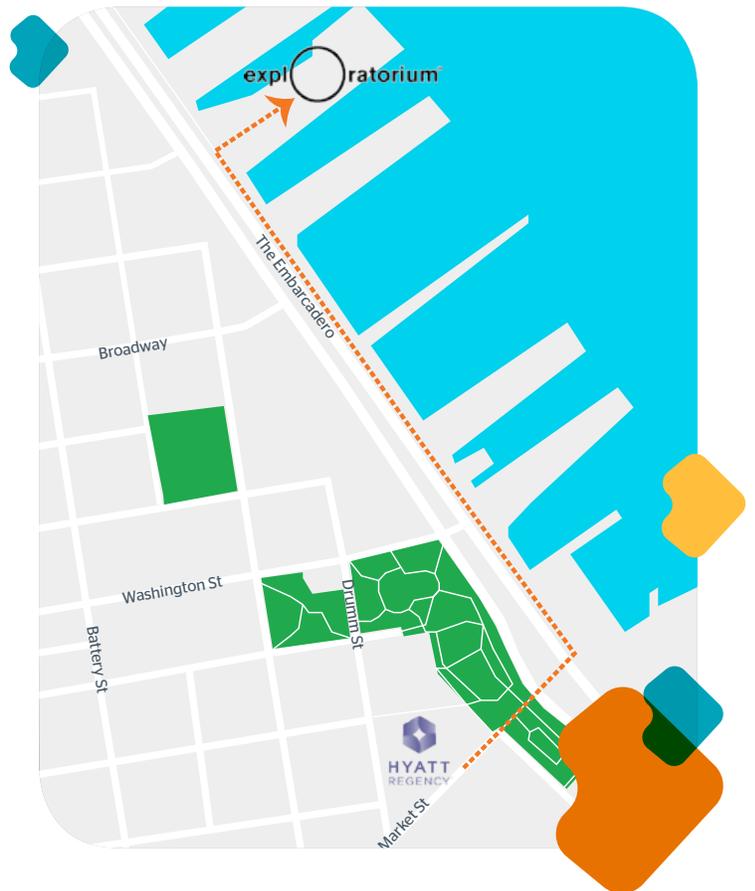
Join a walking tour of San Francisco to stretch your legs and see some local sights. The tour will depart from the hotel and will end at the Exploratorium for the welcome reception. Advance registration is required, and space is limited. Please visit the conference registration desk to learn more and to sign up.

5:30 - 7:30 p.m. WELCOME RECEPTION AT THE EXPLORATORIUM

GEO and the conference host committee welcome you to San Francisco! To kick off the 2018 National Conference, please join us for an evening of networking, cocktails, food and fun.

The reception will be held at the Exploratorium, a public learning laboratory exploring the world through science, art and human perception. Explore hands-on exhibits and take in the view of the San Francisco-Oakland Bay Bridge.

You have two ways to get to the reception. A shuttle bus will be running from the hotel (please board on Market Street), or you can take a 15-minute stroll along the Embarcadero. From the hotel, cross the street to the Ferry Terminal Building, turn left and walk ½ mile to the Exploratorium. GEO staff guides will be along the Embarcadero to direct you.



REFLECTIONS FROM DAY 1

I am seeking peer input on:

I am most looking to connect with:

Reflecting back, my organization has embraced the following effective grantmaking practices:

What practices do I and my organization need to spend more time thinking about to better support the effectiveness of nonprofits in my community?

What tools, resources or sessions offered at the conference will help me make progress in embracing smarter grantmaking practices?

Don't want to forget!

My Site Visit selection(s):

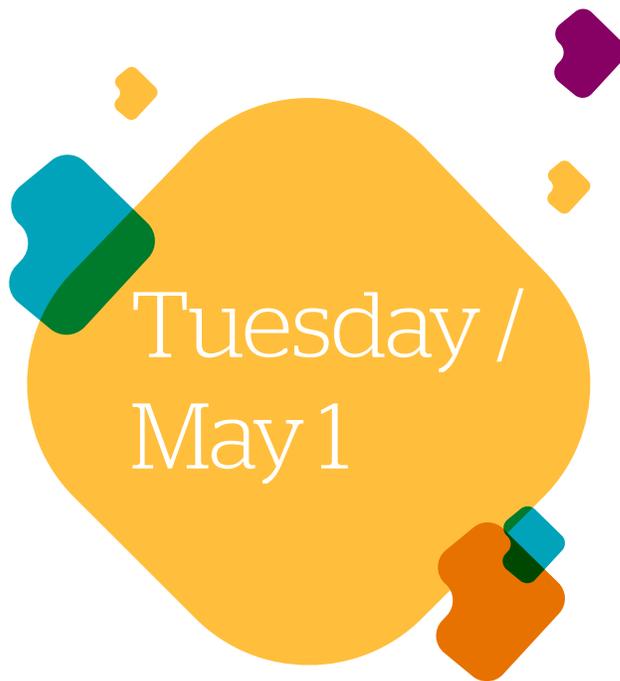
My Dine Around details:

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

Email:

Cell:

We're going to meet at:



6:30 - 7:30 a.m.

ACTIVE HOUR: YOGA

Location: Waterfront AB (Hotel Lobby Level)

Join a yoga class to renew your energy and get ready for the day. Mats will be provided. Advance registration is required, and space is limited. Please visit the conference registration desk to learn more and to sign up.



8:00 - 9:00 a.m.

NETWORKING BREAKFAST

Location: Grand Ballroom (Street Level)

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



8:30 - 10:45 a.m.

SITE VISITS

(Optional. Advance registration and payment^{\$} are required.)

S3. Women's Audio Mission^{\$}

Location: Off-site (Please meet in Market Street Foyer.)

San Francisco is ever-changing, and artists are being rapidly displaced due to spiked demand and prices for real estate. To mitigate this issue, **Community Arts Stabilization Trust** creates innovative financial vehicles to secure permanent space in urban city centers for community arts and culture organizations. This enables arts entities to sustain the creativity and capacity necessary to promote lively and stable neighborhoods. You'll begin your visit by touring the recording studio of the groundbreaking nonprofit **Women's Audio Mission**. You'll explore how WAM's partnership with CAST and other funders supports their ability to serve over 1,500 underserved women and girls per year, as well as operate the only professional recording studio in the world built and run entirely by women. Afterward, learn and discuss how grantmakers and the city are working together to maintain affordable space for arts organizations and see first-hand how funders are playing a vital role at the intersection of the arts, gender equity and community development.

9:15 - 10:30 a.m.

BREAKOUT SESSIONS ROUND B

(Select one of 10 options.)

B1. Examining Your Foundation's Openness Practices

Session Designer: Kari McCann Boutell, Iowa Council of Foundations

Location: Seacliff AB (Bay Level)

Funders are problem solvers, but we sometimes spend time, energy and resources trying to solve the wrong problems. Increasing openness in the funder-applicant relationship is one way we can increase the likelihood that we solve the right problems in the right ways and better align funder dollars and community needs in ways that deliver more equitable and effective solutions for all. Join us to learn about how funders in Iowa, Oregon and Washington have been exploring this topic and examining their relationships with grantees utilizing User Experience and Liberating Structures processes. You will leave understanding the importance of openness and having learned about strategies to assess and improve your own foundation's openness practices.

Speakers:

- Kari McCann Boutell, Iowa Council of Foundations, @IowaCoF
- Maya Thornell-Sandifor, Philanthropy Northwest, @MTSandifor
- Stacy Van Gorp, R. J. McElroy Trust, @stacyvangorp

B2. Using Strategic Financial Knowledge as a Platform to Flexible Grantmaking

Session Designer: Deborah Linnell, van Beuren Charitable Foundation

Location: Pacific LM (Concourse Level)

Great nonprofit vision and strategy needs to be grounded by good business planning and strategic financial management. When it comes to supporting nonprofits by asking critical questions about their business model for achieving their goals, program officers may not have the financial background to ask the right questions or provide the right mix of grants at opportune times to really help nonprofit organizations thrive. Mixing training, case study review and discussion, this session will help you understand the intersection of strategy, financial resilience and the needs of the grantee's "whole enterprise" in

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designing and making grants from the perspective of the nonprofit grantee, funder and capacity builder.

Speakers:

- Deborah Linnell, van Beuren Charitable Foundation
- Hilda Polanco, Fiscal Management Associates, @FMA4nonprofits
- Marilyn Warren, Dr. Martin Luther King, Jr. Community Center

B3. Collaboratively Supporting Grantees to Center Racial Equity

Session Designer: Sally Gillis, Seattle Foundation
Location: Bayview A (Bay Level)

How do funders work together to help grantees center their work on equity and find new ways to collaborate and build capacity to achieve greater impact? Despite many organizations stating a value of equity in their work, actually operationalizing that value in day-to-day work remains a challenge and continues to hinder our ability to address our communities' greatest needs. Explore tools and approaches to apply to your own efforts from lessons learned through a partnership between Race Forward and a Seattle-based funder collaborative in supporting a cohort of grantees to center equity in environmental work.

Speakers:

- Rachael DeCruz, Race Forward
- Sally Gillis, Seattle Foundation

B4. Surrendering Your Power to Learn from Community

Session Designer: Megan Thomas, San Diego Grantmakers
Location: Bayview B (Bay Level)

Professional staff contribute to social change, but community members lead the most effective efforts to address racial and economic injustice. For philanthropy to use its privilege effectively, it must find and fund these community efforts. When creating opportunities for community members and nonprofits to gain power in grant design and decision-making, funders must prioritize transparency and personal contact with applicants and grantees. Hear from a grantee and a steering committee member of the Social Equity Collaborative Fund, which supported grassroots racial justice work in San Diego bringing an existing grant closer to the community.

Speakers:

- Khalid Alexander, Pillars of the Community
- Flor Alvarez, Homie UP
- Megan Thomas, San Diego Grantmakers, @thecirceeffect, @SDGrantmakers

B5. Responding to Capacity Building Needs in Your Community

Session Designers: Emily Boer Drake, Learning for Action; Sindhu Knotz, The Giving Practice; Belen Vargas, Weingart Foundation; and Laura Zumdahl, New Moms, Inc.
Location: Pacific DE (Concourse Level)

Helping build nonprofit organizational capacity starts with an understanding of an organization's needs, challenges and opportunities. Three communities – Los Angeles, Chicago and Washington state – have studied nonprofit capacity building needs in their communities and are responding in very different ways to the needs and challenges these studies unearthed. The session will highlight some key findings from these studies and help you understand how you can effectively learn about and respond to capacity building needs in your community.

Speakers:

- Sindhu Knotz, The Giving Practice
- Belen Vargas, Weingart Foundation
- Laura Zumdahl, New Moms, Inc., @LauraZumdahl

B6. Tackling Police Accountability System Change through Cross-sector Collaboration

Session Designer: Jaye Hobart, Woods Fund Chicago
Location: Pacific FG (Concourse Level)

One of Chicago's greatest challenges and most significant indicators of structural racism is the negative impact of policing on communities of color. In this session, you will discuss the development as well as the strengths and challenges of inter and intra nonprofit and philanthropic collaboration on the volatile issue of police accountability. Come learn more about how a collaboration of Chicago funders helped to catalyze a multi-community organization coalition called the Grassroots Alliance for Police Accountability (GAPA) to develop community-driven and community-owned recommendations for police accountability reform in Chicago.

Speakers:

- Gillian Darlow, Polk Bros. Foundation
- Grace Hou, Woods Fund Chicago
- Mecole Jordan, Grassroots Alliance for Police Accountability



B7. Embedding Learning into the Way We Work

Session Designer: Julia Coffman, Center for Evaluation Innovation

Location: Pacific HI (Concourse Level)

Learning isn't simply a technical problem solved with the right tool, the right template, or even the right data and findings, no matter how many sticky notes and flip charts are involved. We will apply a systems lens to the challenge of learning, looking at it from unexpected angles and across multiple disciplines, identifying how the day-to-day ways in which we think and work affect our ability to learn. Join us to explore questions such as: How do our biases get in the way? Do open-space workspaces support learning? How do foundations actually reward staff and grantees for learning? You will walk away with ideas on how to cultivate learning as an everyday practice – a way of working and thinking and a set of habits.

Speakers:

- Tanya Beer, Center for Evaluation Innovation, @tanyabeer
- Julia Coffman, Center for Evaluation Innovation, @Eval_Innovation
- Srikanth Gopal, Democracy Fund, @srik



B8. Transforming Grantmaking Practice to Improve the Lives of People and Families

Session Designer: Anand Dholakia, Root Cause

Location: Pacific JK (Concourse Level)

In this session, Root Cause and the W.K. Kellogg Foundation will highlight an evolved approach that enables grantmakers to rethink their work, have a more direct and transformative impact on people's lives, and tackle disparities at the population level. Through a family story and case study of the approach in action, you will learn how grantmakers can help people and families thrive by first focusing on their lives, the achievement of life milestones, and the conditions that support or hinder opportunity to achieve them. This understanding helps refine and integrate efforts across capacity building, learning and evaluation, collaboration, and equity. During this session, you will assess your own practices and work with your peers to move beyond traditional grantmaking and one-off solutions to maximize impact in your communities.

Speakers:

- Anand Dholakia, Root Cause, @RootCause
- Andrea Moore, Family Service of the Piedmont
- Howard Walters, W.K. Kellogg Foundation



B9. Supporting Advocacy during Turbulent Times

Session Designer: Melinda Fine, TCC Group

Location: Seacliff CD (Bay Level)

During turbulent times, grantmakers are increasingly providing support to advocacy organizations for achieving systemic change. This session will provide insight into how to support advocacy work effectively, encompassing strategies such as direct grants, capacity building support, technical assistance resources, convening, and related approaches. The speakers will share findings from research on best practices in advocacy funding, different models for building the capacity of advocacy organizations and insights gleaned from being an advocacy-focused grantee. During the session, you will rotate through three interactive discussion tables with time for a large group discussion to understand how you could apply these approaches to your work.

Speakers:

- Melinda Fine, TCC Group
- Katherine Locke, TCC Group, @TCCKate
- Geoffrey Winder, GSA Network, @geoffreywinder



B10. Ensuring Enduring Positive Change by Advancing Equity

Session Designer: Chris Kabel, The Kresge Foundation

Location: Pacific NO (Concourse Level)

The Weingart, Schott and Kresge Foundations – three funders with different histories, cultures and strategies – have all engaged in long-term efforts to apply explicit equity lenses to how they fulfill their missions. This session will share lessons from their experiences and offer frameworks for advancing equity within your own organizations. You will engage in discussion, share your own approaches and build understanding about what it will take to drive an equity agenda within your foundation as we consider what's possible when the philanthropic sector puts its values around equity into practice.

Speakers:

- Joanna Jackson, Weingart Foundation
- Chris Kabel, The Kresge Foundation, @ckabel
- Edgar Villanueva, The Schott Foundation for Public Education, @SchottFound



10:30 – 11:00 a.m.

BREAK



11:00 a.m. - 12:15 p.m.

BREAKOUT SESSIONS ROUND C

(Select one of 10 options.)

C1. How a Global Learning Strategy Improves Grantmaking in the U.S.

*Session Designers: Karabi Acharya, Robert Wood Johnson Foundation, and Jemma Weymouth, Burness
Location: Seaclyff AB (Bay Level)*

Good ideas have no borders! To build a more equitable future for the United States we need the best ideas from around the world – and we need to be able to share that knowledge quickly. Through a series of interactive activities, you will explore how lessons from other nations could inform your own efforts to advance social change in the U.S. You will also brainstorm how you as grantmakers can begin to operationalize a global learning strategy to find proven and promising programs, policies and practices in other countries, and bring them back to our shores.

Speakers:

- Karabi Acharya, Robert Wood Johnson Foundation, @karabiglobal
- Jason Corburn, Ph.D., University of California Berkeley, @jasoncorburn
- Angela Venza, International Youth Foundation, @iyftweets

C2. Creating an Inclusive Culture One Step at a Time

*Session Designer: Stephanie Andrews, Bush Foundation
Location: Seaclyff CD (Bay Level)*

Changing organizational culture takes intention and time. At the Bush Foundation, we've spent the last five years creating a more inclusive culture internally so that we can be more effective externally. We've learned a lot yet sometimes feel as if we've just begun. In this session, we hope to inspire, equip and connect with other organizations by sharing our story, highlighting the tools and approaches we've tried, and discussing what's worked and what hasn't. You'll leave this session with a clearer sense of how organizational culture change around diversity, equity and inclusion happens and ideas about how to move from aspiration to action.

Speakers:

- Stephanie Andrews, Bush Foundation, @StephAndrews007
- Naaima Khan, Bush Foundation, @naaimak
- Anita Patel, Bush Foundation, @patelan

C3. Incorporating Beneficiary Voice in Decision-Making

*Session Designer: Lauren Sauer, Roberts Enterprise Development Fund (REDF)
Location: Bayview A (Bay Level)*

Foundations often express a desire to learn from those they serve as a practice to increase impact. Listening to nonprofits allows an organization to connect more authentically to those it seeks to help and benefit from the wisdom and experiences they have, but more importantly, it can foster a more equitable power dynamic. REDF and partners will define how perceptual feedback is a mechanism that addresses this challenge and share its experience embedding a perceptual feedback study into its grantee evaluation. You will receive a sample perceptual feedback survey and learn how to interpret the results of perceptual feedback into programmatic change.

Speakers:

- Jay Feldman, RTI International
- Shelby Mason, Goodwill of Silicon Valley
- Melinda Tuan, Fund for Shared Insight, @melindatuan

C4. Strengthening Nonprofits as a Social Justice Strategy

*Session Designer: Kathy Reich, Ford Foundation
Location: Bayview B (Bay Level)*

Social justice organizations, which work to eliminate political, economic, and social inequality among all people, are truly having a “best of times, worst of times” moment in the United States. A strengthened sense of urgency and diverse leadership have breathed purpose and passion into issues, while at the same time organizations are facing extraordinary challenges. How can funders help social justice organizations thrive? Which grantmaking strategies and practices are most likely to contribute to nonprofit success? What advice do nonprofits have for funders? This session will use an interactive format guided by two funders and a nonprofit leader who are actively engaged in social justice work. You will leave with a set of strategies and resources for how to advance social justice in the United States.

Speakers:

- Nikki Fortunato Bas, Partnership for Working Families, @nikkifbas
- Kathy Reich, Ford Foundation, @kdreich
- Magui Rubalcava Shulman, Borealis Philanthropy



C5. Building a Culture of Learning for Continuous Improvement



*Session Designers: Matthew Carr, Ewing Marion Kauffman Foundation, and Pamela Schwartz, Kaiser Permanente
Location: Pacific DE (Concourse Level)*

There are several barriers that can prevent organizations from realizing the full potential of strategic learning to drive continuous improvement. These include lacking time and space for critical reflection, not having a strong culture of trust and transparency, and failing to connect data and learning back to programs and strategies. This session will provide guidance for you to create stronger internal learning systems, including specific tools and practices, insights gained from experience, and critical lessons learned along the way. You can expect to learn about concrete ways to nurture a more robust culture of learning with your teams.

Speakers:

- Matthew Carr, Ewing Marion Kauffman Foundation
- Brittany Giles, Kaiser Permanente Community Benefit
- Pamela Schwartz, Kaiser Permanente Community Benefit



C6. Philanthropy’s Role in Closing the Nonprofit Racial Leadership Gap



*Session Designer: Sean Thomas-Breitfeld, Building Movement Project
Location: Pacific FG (Concourse Level)*

A decade ago, nonprofits and foundations in California had a robust debate about the lack of investment in organizations and leaders of color in the state. Since then, national studies have still shown that few nonprofit executive directors are people of color, despite widespread agreement that organizational leadership should reflect the demographics of communities served. This session will draw on national survey data on leadership and race in the nonprofit sector with a particular focus on how philanthropy has sometimes been a barrier for aspiring leaders of color and share ideas for what grantmakers can do to move the sector forward.

Speakers:

- William Cordery, Wellspring Philanthropic Fund, @williamcordery
- Sean Thomas-Breitfeld, Building Movement Project, @BldingMovement
- Marissa Tirona, Ford Foundation, @marissatirona



C7. Building a Collaborative Institutional Culture for Community Engagement



*Session Designer: Hanh Cao Yu, The California Endowment
Location: Pacific HI (Concourse Level)*

Community residents are often the necessary healers and generators of solutions to racial inequities, systems/policy change, and community transformation. With that in mind, how can funders design and implement a high-quality community engagement process that results in authentic, honest and meaningful feedback that helps us to understand what works, what doesn’t, and how to improve? This session features a design space so that you can identify principles, values, and an action planning tool to use as a framework. We’ll also explore the use of a “yin and yang” tool that synthesizes engagement findings to stimulate ideas necessary in responding to both positive and difficult feedback.

Speakers:

- Frank Farrow, Center for the Study of Social Policy
- Tara Westman, The California Endowment
- Hanh Cao Yu, The California Endowment, @HanhCaoYu



C8. Engaging Boards and Trustees in Learning and Evaluation

*Session Designer: Hallie Preskill, FSG
Location: Pacific JK (Concourse Level)*

To have a true learning culture within a foundation, boards and trustees need to be engaged in learning and evaluation efforts. However, foundation staff are often challenged by when, how, and at what depth to engage these stakeholders in learning from and about evaluation. This session will share new insights and tools to more effectively engage boards and trustees in thinking about and supporting learning and evaluation efforts, and provide an opportunity for you to learn from foundation peers about how they have successfully engaged their boards and trustees in evaluative thinking and practice.

Speakers:

- Joelle Cook, FSG
- Hallie Preskill, FSG, @evalgal
- Diana Spencer, William G. McGowan Charitable Fund



C9. Working with Intermediaries for Scalable and Sustainable Transformation

*Session Designer: Jill Wohlford, Rockefeller
Philanthropy Advisors*

Location: Pacific LM (Concourse Level)

Grantees need flexible support, but foundations struggle to respond to their needs, aggregate demand and lessons across individual grants, and share learning with grantees and the field. In response to these challenges, foundations may choose to work with and through intermediary partners. In this session, you will explore the roles intermediaries can play and how best to leverage their relationships, subject matter expertise and grantmaking capacity to scale and sustain your work. We will draw from experiences of the Bill & Melinda Gates Foundation Postsecondary Success strategy, the Association of Public & Land-grant Universities, and the United Negro College Fund.

Speakers:

- Scott Dalessandro, Bill & Melinda Gates Foundation
- Shannon Looney, Association of Public & Land-grant Universities
- Edward Smith-Lewis, UNCF

C10. Managing Risk in Philanthropy

Session Designer: Maya Winkelstein, Open Road Alliance

Location: Pacific NO (Concourse Level)

Philanthropy can present risks, and research shows that the sector lacks a standard for defining and managing risk. However, taking risks can be necessary and good, while even tried-and-true interventions can hit unexpected roadblocks. Without a clear framework, one can't adequately plan for or take risk and this gap contributes to suboptimal planning, disruptions during project implementation, and inefficient funder-nonprofit interactions. Drawing on Open Road's research and tools combined with insights from a nonprofit leader pioneering risk management, this session will provide practical understanding of risk in philanthropy and best practices for managing risk in grantmaking.

Speakers:

- Jesús Gerena, Family Independence Initiative, @FIINational, @jcgerena
- Maya Winkelstein, Open Road Alliance, @openroadtweets

12:30 - 2:30 p.m.

PLENARY LUNCHEON: FUNDING FOR JUSTICE AND CHANGE

Location: Grand Ballroom (Street Level)

To achieve our vision for individuals and communities, grantmakers must work to address the historic, emerging, dynamic and collective forces at work to suppress racial, social and economic injustice. Actively working to use our privilege and position to address inequity is a bedrock of effective grantmaking. In this plenary session, we'll hear from Nikole Hannah-Jones, a *New York Times* investigative reporter and 2017 MacArthur Foundation fellow.

In conversation with Jon Funabiki of Renaissance Journalism, she will explore the historical nature of inequitable systems, looking at entrenched patterns of discrimination and reflecting on how policies, practices and politics together can be used to maintain discrimination and segregation and stymie efforts to create equity in our work. We'll reflect on how our funding practices can either support the status quo or lay the groundwork for authentic, lasting change.

Introductory Remarks:



Grace Hou, Woods Fund Chicago



LaTida Smith, Moses Taylor Foundation



Stacy Van Gorp, R. J. McElroy Trust

Speakers:



Jon Funabiki, Renaissance Journalism, @funabiki



Nikole Hannah-Jones, *The New York Times*, @nhannahjones

 **2:30 - 3:00 p.m.**
BREAK



3:00 - 4:45 p.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.



**SEACLIFF ABCD
(BAY LEVEL)**

**PACIFIC FGHI
(CONCOURSE LEVEL)**

**PACIFIC LMNO
(CONCOURSE LEVEL)**

Round 1: 3:00 - 3:25 p.m.



1A.
Ben Mangan, *Haas School of Business, University of California, Berkeley*



1B.
Fania Davis, *Restorative Justice for Oakland Youth*



1C.
Christina Canales Gorczynski, *The Simmons Foundation*

Round 2: 3:40 - 4:05 p.m.



2A.
Keesha Gaskins-Nathan, *Rockefeller Brothers Fund*



2B.
Virginia Eubanks, *University at Albany, SUNY*



2C.
Raj Jayadev, *Silicon Valley De-Bug*

Round 3: 4:20 - 4:45 p.m.



3A.
Nick Tilsen, *Thunder Valley Community Development Corporation*



3B.
Bridgit Antoinette Evans, *Pop Culture Collaborative*



3C.
Rodolfo Mendoza-Denton, *University of California, Berkeley*



3:00 – 3:25 p.m.

ROUND 1 TALKS**1A. Vulnerability and Failure are the Keys to Scale Impact**

Ben Mangan, Haas School of Business, University of California, Berkeley
Location: Seacliff ABCD (Bay Level)

Too often, the social sector follows a predictable pattern as we aim for progress. We invest in solutions we believe will be game changing, based on evidence from past efforts and

alignment with our values. We run these programs for years and then conduct randomized control trials. Predictably, we frequently find ourselves disappointed by the results. There's a more powerful way for us to problem-solve, but it requires us to ask hard questions about the way we typically do our work and the way the entire sector is structured. Most of all, the path to more impact forces us to be truly vulnerable and embrace the right kind of failure. Join Ben Mangan to learn about how we can be more effective problem-solvers when we take the right kinds of risk.

Please note that Ben is not available to stay for the Social Hour from 5 – 6 p.m.

1B. Using Restorative Justice to Transform Racialized Harm in the U.S.

Fania Davis, Restorative Justice for Oakland Youth
Location: Pacific FGHI (Concourse Level)

The wave of internationally publicized killings of unarmed black people engendered the Black Lives Matter movement, sparking an

unprecedented national conversation on race and outcry for justice. Though the justice most often envisioned is criminal prosecution, responsible individuals are rarely prosecuted. And that alone wouldn't stop these killings, as the problem is *systemic*. A restorative justice-based truth and reconciliation approach offers hope. Fania Davis will highlight efforts bubbling up across the nation, and share strategies such as truth-telling, healing circles, and reparative justice that will help individuals and institutions in the U.S. interrupt and transform cycles of racialized historical trauma.

1C. Inclusive Grantmaking Requires Breaking Norms

Christina Canales Gorczynski, The Simmons Foundation
Location: Pacific LMNO (Concourse Level)

Prioritizing inclusion and relationship building requires funders to revolutionize the way we work, because the current model of

grantmaking can exclude, marginalize and demean the voices we want to amplify. Once we acknowledge that community members live multi-dimensional lives, we must be more intentional when partnering with funders, nonprofits and the community at large. Christina Canales Gorczynski will highlight the Simmons Foundation's work to address the power dynamics inherent in philanthropy and how the foundation identified avenues for communities to drive and direct change.

3:40 – 4:05 p.m.

ROUND 2 TALKS**2A. Our 21st-Century Democracy**

Keesha Gaskins-Nathan, Rockefeller Brothers Fund
Location: Seacliff ABCD (Bay Level)

Increased use of technology and automation, a booming gig economy, widening wealth gap, and other trends are redefining Americans' economic future and expectations of government.

Other conditions also implicate the ability of collective action to shift outcomes including: contemporary systems that mirror historical practices to achieve racial injustice; dominant platforms and corporations; financialization of the economy; mutative effects of social media on traditional and online media; and big data's effect on the nature of human interaction. With all of these intersections influencing democratic practice, what does it mean to practice democracy in this day and age? In this talk, Keesha Gaskins-Nathan will discuss how grantmakers must support development of transformative strategies that address the democratic and economic systems that enable civil society to influence political policy and economic outcomes to achieve shared prosperity for all.



2B. Automating Austerity



Virginia Eubanks, University at Albany, SUNY

Location: Pacific FGHI (Concourse Level)

Grantmakers are increasingly turning to data-based policy-making and algorithmic decisions to increase accountability, use resources more efficiently and ensure effectiveness. But what if these tools also act as “empathy overrides,” providing emotional distance from some of the most troubling challenges we face as a society? The experience of poor and working-class families targeted by the nation’s most invasive digital systems suggests that, despite their potential, these tools may also automate austerity and super charge inequity. Virginia Eubanks, professor at the University at Albany, SUNY and author of *Automating Inequality*, offers lessons from twenty years of research and reporting on the use of digital tools in public service programs to place the big data revolution in its political and economic context.

2C. Creating Space for Systems Change



Raj Jayadev, Silicon Valley De-Bug

Location: Pacific LMNO (Concourse Level)

Grantmakers are increasingly considering how to alter harmful systems nestled in society in order to improve the effectiveness of funding. Here, some nonprofits and community groups are leading the way by centering systems change and creating their own metrics to measure progress. But if we want nonprofits to adopt a systems mindset, we need to enable them to do so. Raj Jayadev of Silicon Valley De-Bug will share how De-Bug has been transforming the criminal justice system using a “participatory defense” approach that empowers families and community members to sway the result of court cases. He’ll suggest ways grantmakers can support systems change work led by nonprofits and communities, and how creating space allows for the innovation that’s needed to tackle oppressive systems and institutions.

4:20 – 4:45 p.m.

ROUND 3 TALKS

3A. Building Collective Power in Indigenous Communities



Nick Tilsen, Thunder Valley Community Development Corporation

Location: Seaciff ABCD (Bay Level)

The Oglala Lakota people on the Pine Ridge Indian Reservation are shifting the paradigm and creating radical change at ground zero for poverty and inequity in America.

Nick Tilsen of the Thunder Valley Community Development Corporation will explore how this community of organizers, cultural bearers, practitioners and change makers are creating pathways to prosperity not only for themselves, but are also beginning to scale up change everywhere in indigenous communities. In the process, they are redefining how philanthropy and social impact investing acts and looks. He’ll share lessons learned and consider whether equity can be accomplished in the U.S.

3B. Stories as Catalysts for Widespread Change



Bridgit Antoinette Evans, Pop Culture Collaborative

Location: Pacific FGHI (Concourse Level)

American culture and narratives are rooted in a collective ambivalence about how we formed this country – in both oppression

and opportunity; open doors to some, closed to others; welcoming from afar but often discriminatory day-to-day. But traditional messaging campaigns and op-eds aren’t generally effective at moving people toward a greater sense of shared fate. That’s because underneath the very public debates and divides lies a complex web of personal dreams, yearnings, fears and anxieties – the irrational, emotional life – of people. In this messy space within each of us, we determine what we believe, how we behave and whether we are open to change. How can culture change strategy, narrative systems and immersive pop culture experiences speak to these deeper motivations that drive our choices and behavior? And as grantmakers and social justice movements, where do we even begin to dig into this new work? Bridgit Antoinette Evans’ theory: it all begins with a deceptively simple story.



3C. The Implications of Implicit Bias



*Rodolfo Mendoza-Denton, University of California, Berkeley
Location: Pacific LMNO (Concourse Level)*

Focusing on equity necessitates reflection on ourselves and reckoning with the impact of our actions, regardless of our intentions.

Understanding how implicit bias can manifest in behavior is crucial to understanding how our organizations may perpetuate the very inequities we seek to reduce. Implicit bias refers to the attitudes that affect our interpretations, evaluations, actions and decisions in ways that we may not always be aware of. In this talk, Professor Rodolfo Mendoza-Denton will break down the consequences of implicit bias in organizations, as well as discuss techniques to mitigate its effects.

5:00 – 6:00 p.m.
SOCIAL HOUR WITH SHORT TALK SPEAKERS

Location: Seaclyff Foyer (Bay Level)

Do you have burning questions from the Short Talks? Did a speaker say something that intrigued you or caused you to want more information? Join the Social Hour to connect with Short Talk speakers and hear more.

6:00 – 8:00 p.m.
CEO AND TRUSTEE RECEPTION

(Invitation Only)

7:00 – 9:00 p.m.
DINE AROUNDS

Location: Off-site

Join a group of your colleagues for dinner and informal conversation. 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. You can view location options and sign up to join or host a group at the registration desk. Diners should meet in the lobby area for a 7:00 p.m. departure.

REFLECTIONS FROM DAY 2

The breakout sessions I've attended thus far:

A new insight I can share with colleagues from these sessions:

An aha moment from today's Short Talks or plenary:

Something my organization does that might be perpetuating inequity:

I realized I could be doing _____ differently



6:30 - 7:30 a.m.

ACTIVE HOUR: YOGA

Location: Waterfront AB (Hotel Lobby Level)

Join a yoga class to renew your energy and get ready for the day. Mats will be provided. Advance registration is required, and space is limited. Please visit the conference registration desk to learn more and to sign up.

8:30 - 10:00 a.m.

PLENARY BREAKFAST: CENTERING PHILANTHROPIC CHANGE IN COMMUNITY

Location: Grand Ballroom (Street Level)

Organizations seeking to support authentic change on complex, multi-layered issues often find that listening to and being in relationship with impacted communities is central to the work. Hearing from those communities as issues unfold creates opportunities for funders to identify emerging concerns and bolster efforts for insightful, community-driven change.

In this session, we'll hear from local grantmakers and nonprofits tackling housing insecurity in the Bay Area. As in many communities across the country, rising housing costs have led to complicated, overlapping social problems that funders and nonprofits are partnering to address. Through their stories, we'll delve into ways that funders and nonprofits are developing a deeper, more nuanced understanding of the communities they serve and the issues they face.

Introductory Remarks:



Ellen LaPointe, NCG, @NorCalGrant

Speakers:



Fred Blackwell, The San Francisco Foundation



Gloria Bruce, East Bay Housing Organizations



James Head, East Bay Community Foundation



Christina Livingston, ACCE (moderator), @CalOrganize

10:15 - 11:30 a.m.

BREAKOUT SESSIONS ROUND D

(Select one of 8 options.)



D1. Uncovering Capacity Building Needs for Diverse Communities



Session Designer: Brennan Gang, Korean American Community Foundation

Location: Seacliff AB (Bay Level)

The Korean American Community Foundation launched its capacity building fellowship program to address the need for bilingual and bicultural consultants within the Korean community. Together with its nonprofit consulting firm partner, Community Resource Exchange, the foundation developed a collaborative model that tackled the issue in a two-pronged approach – training up a cohort of Korean nonprofit professionals and then deploying them to work as consultants to strengthen Korean nonprofits. Through the sharing of lessons learned and a series of immersive activities, experience how to get to the heart of the challenges that different stakeholders face around capacity building and how you can reframe the problem to create an innovative solution for your own community.

Speakers:

- Linda Lee, Korean Community Services of Metropolitan New York, Inc., @linder737
- Katie Leonberger, Community Resource Exchange, @katieleonberger
- Kyung B. Yoon, Korean American Community Foundation, @KyungNYC



D2. Using Rapid-Response Collaboration to Protect the Social Safety Net

Session Designer: Scott Nielsen, Arabella Advisors
Location: Pacific JK (Concourse Level)

This “Think Tank” session will challenge you to explore and build upon a model for rapid-response collaboration involving both grantmakers and grantees, using the recent work of the Safety Net Defense Fund as an example. Formed to respond to challenges to the social safety net in the wake of the November 2016 election, the SNDF has developed and deployed a new model for collaborative, rapid-response, advocacy-focused grantmaking, and it continues to respond adaptively in largely uncharted terrain. You will have the chance to both learn from and build upon its efforts, with a view to helping everyone understand how we can move together quickly and effectively when circumstances require.

Speakers:

- Jason Garret, Open Society Foundation
- Scott Nielsen, Arabella Advisors
- Louisa Warren, Center on Budget and Policy Priorities

D3. Leveraging Networks for Community Change

Session Designer: Lynn Fick-Cooper, Center for Creative Leadership
Location: Bayview A (Bay Level)

Looking to build sustainable capacity for change within communities? The Kate B. Reynolds Charitable Trust, the Center for Creative Leadership, and Rural Forward have been working together to improve health outcomes in rural North Carolina by activating and supporting community networks as an effective method for creating systemic and sustainable change. Through this interactive session, you will experience and come to understand critical elements of success when pursuing your own systems change work.

Speakers:

- Calvin Allen, Rural Forward NC
- Lynn Fick-Cooper, Center for Creative Leadership, @fick-cooper_lynn
- Lori Fuller, Kate B. Reynolds Charitable Trust, @lorifullerisme

D4. Building Grantees' Capacity for Diversity, Equity and Inclusion Work

Session Designer: Jennifer Wei, The William and Flora Hewlett Foundation
Location: Pacific FG (Concourse Level)

Diversity, equity and inclusion have taken center stage in the world and in philanthropy. The Hewlett Foundation and other funders are seeing growing interest among nonprofits for capacity building support as they seek to recruit and retain diverse staff, build more inclusive cultures, and pursue equity inside as well as outside their organizations. Representatives from two foundations and one nonprofit will share lessons learned from several pilot DEI capacity building efforts across environment, education and community building. You will then have the opportunity to engage in small-group conversations on how to meaningfully support the nonprofits you work with in their DEI capacity building efforts.

Speakers:

- Deoohn Ferris, National Audubon Society, @audubon
- Dahnes Medora, Meyer Memorial Trust, @dahnesm@meyermt
- Jennifer Wei, The William and Flora Hewlett Foundation, @Hewlett_Found

D5. Learning from and Applying a Full Cost Approach

Session Designer: Kate Seely, Northern California Grantmakers
Location: Pacific HI (Concourse Level)

A commitment to doing good means also having a commitment to providing for the actual cost to make change happen. The Full Cost Project understands that funding is about more than making things better for nonprofits but also about changing funding practices that diminish the effectiveness and vitality of nonprofits. During this session, you will gain tools for applying the full cost approach to your grantmaking in order to better support and strengthen nonprofits.

Speakers:

- Claire Knowlton, Nonprofit Finance Fund, @nff_news
- Ellen LaPointe, Northern California Grantmakers, @norcalgrant



 **D6. When Is Collective Impact Most Impactful?**

Session Designers: Jennifer Splansky Juster, Collective Impact Forum, and Sarah Stachowiak, ORS Impact
Location: Seacliff CD (Bay Level)

Many funders are deeply engaged in collaborations, including collective impact initiatives. But what do we know about the practices that lead to positive system and population changes in these initiatives? Join this session to discuss the results of the Collective Impact Field-wide Research study and hear what funders can be doing differently based on the results. We will dive into the research and explore the ways in which collective impact initiatives contribute to strong results and what we learned about equity in this work. You will then have the opportunity to participate in small peer group discussions on applying the research to your own work.

Speakers:

- Jennifer Splansky Juster, The Collective Impact Forum, @CIForumTweets
- Sarah Stachowiak, ORS Impact, @sarahstachowiak
- Luis Velez, W.K. Kellogg Foundation

 **D7. Strategies for Engaging Young People in Social Change**

Session Designer: Seema Shah, Ph.D., COMMIVEDA Consulting LLC
Location: Pacific LM (Concourse Level)

Across the country, the voices of young people have been critical in advancing social change efforts. This session combines new, longitudinal research on youth organizing, along with the voices of young people themselves, to explore the ways in which youth engagement has propelled campaigns for social justice, while also contributing to the social-emotional, academic, civic education, and leadership development of young people. You will gain a deeper understanding of how youth organizing fits into broader youth development work and gain exposure to the latest data on youth organizing to make the case for this work within your own organizations.

Speakers:

- Rashida Govan, Ph.D., Urban League of Louisiana, @rashidagovan
- Seema Shah, Ph.D., COMMIVEDA Consulting LLC, @sshahphd
- Neva Walker, Coleman Advocates for Children and Youth, @neva_walker

 **D8. Learning and Evaluation that Matches the Complexity of Systems Change**

Session Designer: Rachel Mosher-Williams, Community Wealth Partners
Location: Pacific NO (Concourse Level)

Grantmakers and nonprofits are increasingly aware of how social systems, and the structural racism that pervades them, interact to impact the well-being and life outcomes of entire populations in this country. Even funders of specific issues or communities are recognizing the need to think beyond their immediate grantees to a broader set of actors across systems. Learning and evaluation of these more holistic approaches can be as complex as the issues themselves. This advanced session will highlight multi-system approaches across the country and how you can design and apply learning frameworks to understand interim changes, bring clarity around grantmaker accountability, and effectively collaborate with stakeholders in the learning process.

Speakers:

- John H. Jackson, The Schott Foundation for Public Education, @SchottFound
- Rachel Mosher-Williams, Community Wealth Partners, @RMosherWilliams
- Emily Yu, The BUILD Health Challenge, @DCxchange





11:45 a.m. - 1:15 p.m.

CLOSING SESSION: POWER AND THE FUTURE OF PHILANTHROPY

Location: Grand Ballroom (Street Level)

Power can subjugate people or inspire them, exclude or include, hurt or help. Who has the power in your work? Why do some crave it and others push it away? What does it mean to have this power? How might the story of philanthropy be written to ensure an inclusive, equitable and sustainable future?

Developed by global design firm IDEO and the Sundance Institute Theatre Program, Creative Tensions is an approach to group dialogue that fosters openness and connection. This session will engage participants in a Creative Tensions conversation to explore these questions and others in ways that both encourage openness and inspire empathy. Join us as we close the conference by reflecting on our experiences together and exploring how power and agency shape our work.

Introductory Remarks:



Grace Hou, Woods Fund Chicago



Stacy Van Gorp, R. J. McElroy Trust

Speakers:



Justin Maxson, Mary Reynolds Babcock Foundation



Lateefah Simon, Akonadi Foundation



Shalu Umopathy, IDEO (moderator)

REFLECTIONS FROM DAY 3

I learned:

I was reminded that:

My first action item:

For my reading list:

I want to follow up with:

about: _____

As a result of this conference, I will:

GEO Membership Information



GEO is the home of grantmakers eager to learn and improve, regardless of issue or geography. If you want to do more to strengthen nonprofits and provide the type of support that matters most in moments of uncertainty, then the GEO community is the place for you.

In a world where the old rules of philanthropy no longer apply, our community turns a hunger for more effective grantmaking 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 on not just *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 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:

May 29 - 30, 2019

**THE LEARNING
CONFERENCE 2019**
Seattle, Washington

Registration opens to GEO
members in early 2019

October 28 - 29, 2019

**FALL TOPICAL
CONFERENCE 2019**
New York, New York

Registration opens to GEO
members in summer 2019

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 us at membership@geofunders.org or [202.898.1840](tel: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 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 support and feedback from your grantmaking peers
- LAUNCH, a bi-monthly digest packet with information and links to 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

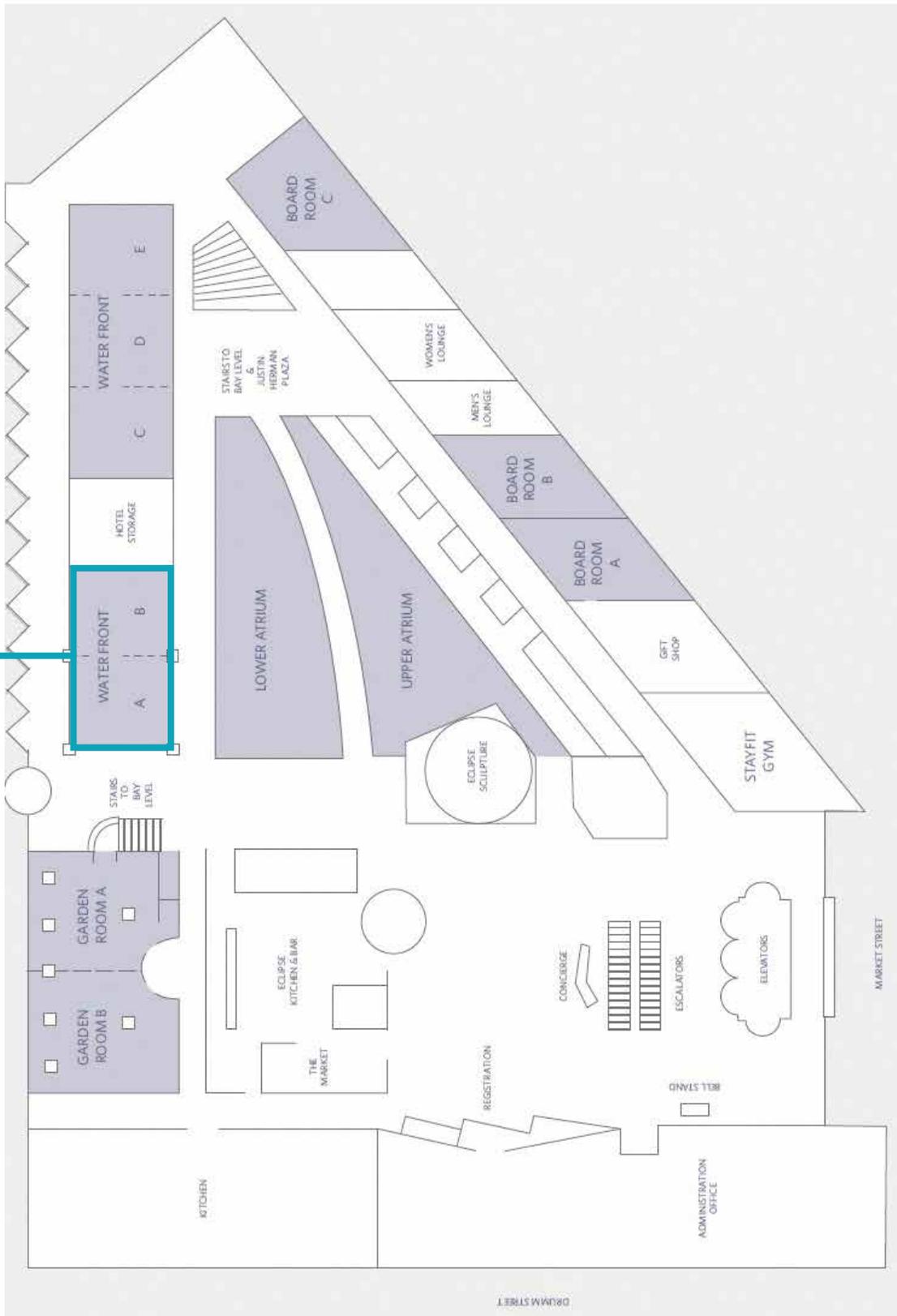
Address shared challenges in grantmaking and build knowledge with peers, to ultimately bridge the gap between what works and how to make it happen within your organization. Stay informed of emerging philanthropic trends and promising practices, and find support for experimentation and growth.

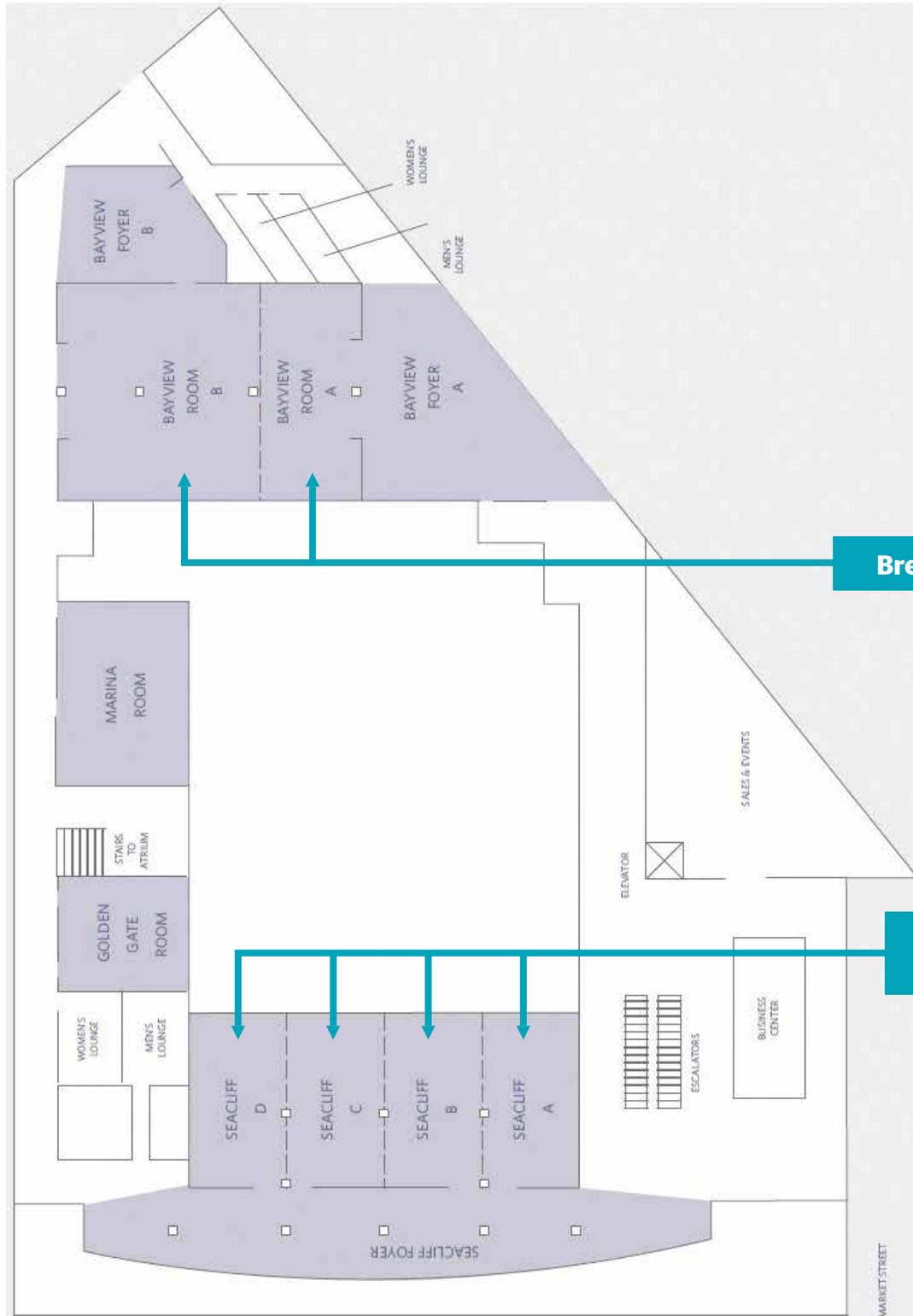
- Discounts and priority registration for all of GEO's conferences and in-person events
 - **GEO conferences consistently sell out, making priority registration a valuable member benefit.**
- In-person learning opportunities, including workshops focused on key topics (like capacity building, grantee inclusion and culture) as well as long-term cohort programs
- Remote learning opportunities, including our 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

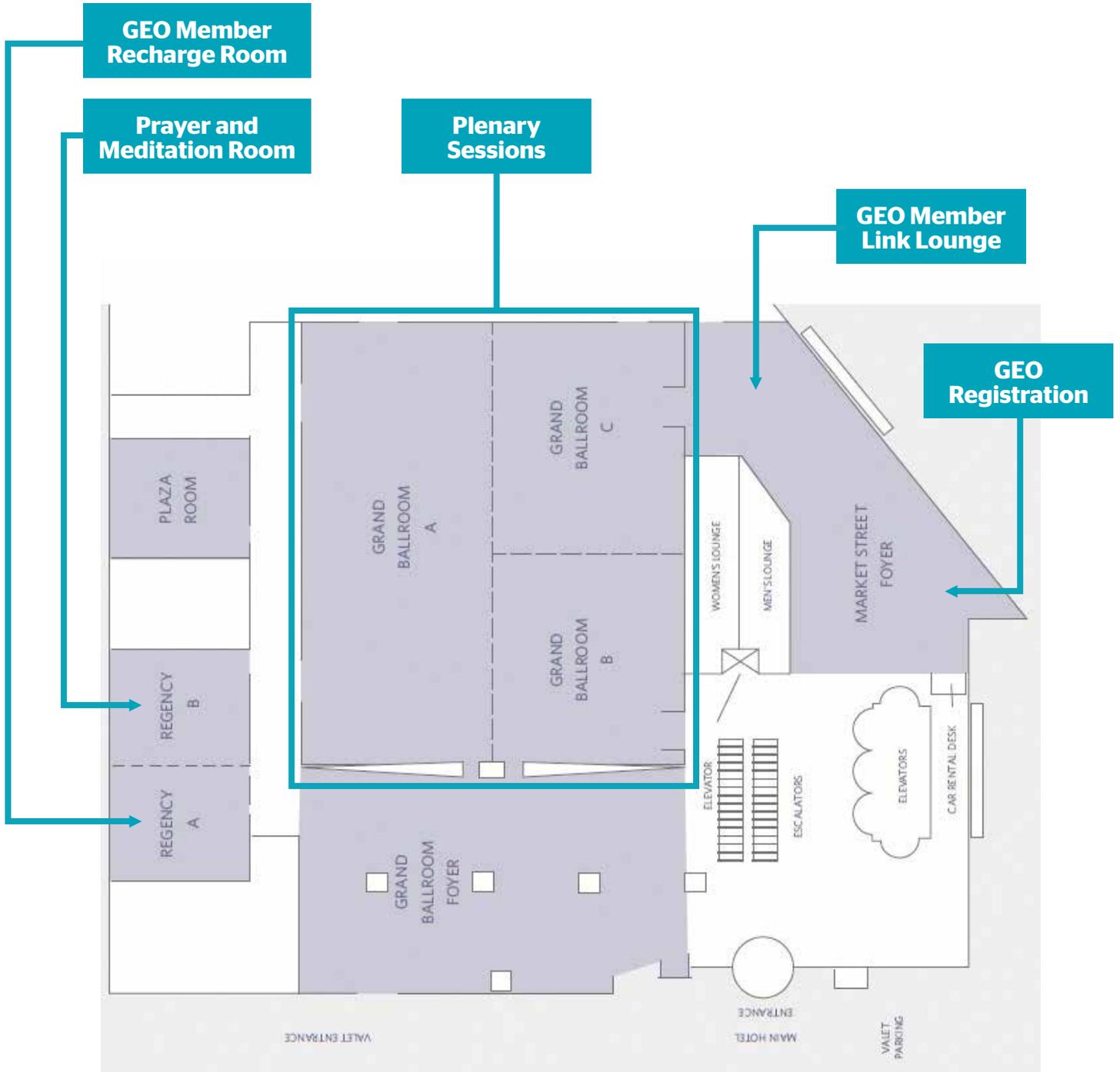


Hotel Lobby Level (Two Above Street Level)

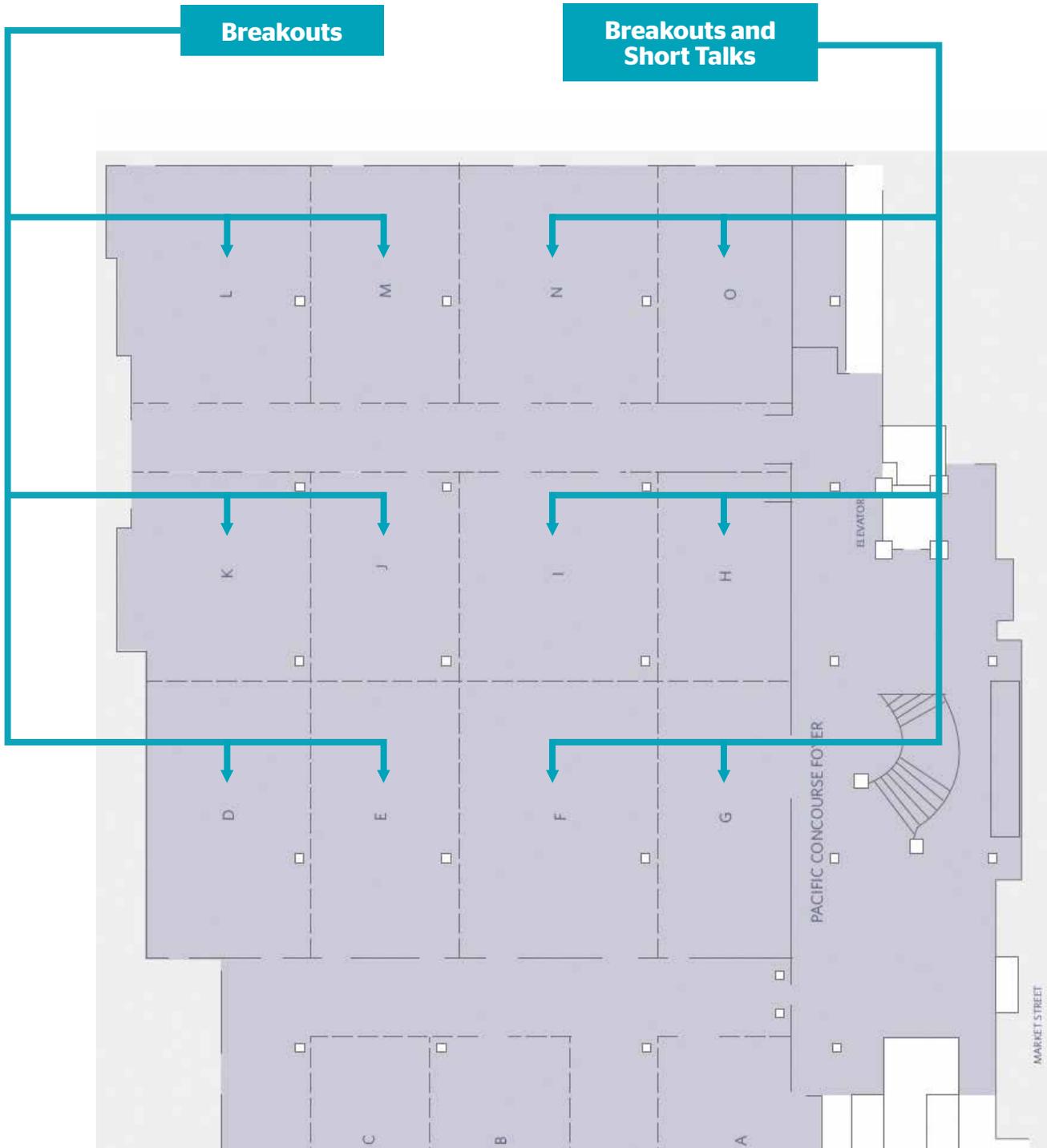
Active Hour:
Yoga







Concourse Level (One Below Street Level)



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THANK YOU!

We want to thank all of our conference supporters. We would not be able to put on this conference without you and your generous support of this event and GEO's 20th anniversary.



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