Conference Session Descriptions

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Monday, March 10

Pre-Sessions

1. **Introduction to GEO's Change Agenda**. New and old GEO members alike will benefit from this session that will share key lessons learned about philanthropic effectiveness over the 10 years since GEO's founding, and how this learning has formed GEO's agenda for change. The session will also cover four themes that are core to GEO's work and central to the conference program: leadership development, organizational learning, supporting nonprofit capital structures, and inclusiveness.
Session Designer: Gregg Behr, Grable Foundation
Speakers: Gregg Behr; Beth Bruner, Bruner Foundation; Janine Lee, Southern Partners Fund

2. **Role Dilemmas Explored: Generating New Insights into Difficult Conversations.** Introducing new ideas or promoting changes in an organization, a field, or a community is exciting and important work for grantmakers. However, it doesn't always go as well as we'd like. As one grantmaker remarked to GrantCraft, it is the soft

things that are hard to learn. In this session participants will look at difficult conversations they've had through several lenses to gain insights into what happened and learn new frameworks that can make the next conversation easier. The ideas behind this strategy come from work with hundreds of grantmakers that led to the Personal Strategy guide by GrantCraft. Pre-registration is required, and participants will be given a 20-minute assignment to complete before the session.
Session Designer: Jan Jaffe, GrantCraft
Speaker: Jan Jaffe.

3. **Share and Learn: A Participatory Workshop on Learning Practices in the Philanthropic Sector.** Whether you are experienced in knowledge management and evaluation or new to the topic of learning for results, come to this interactive session to share your stories, learn with your peers, and envision successful learning practices for grantmakers. Facilitators will use participants' experience and questions as a starting point, derive insights from the collective wisdom gathered in the room, and give each participant the opportunity to create an action plan for their own learning initiatives. Pre-registration is required, and participants will be asked to fill out a short survey in preparation for this session.
Session Designer: Roberto Cremonini, the Barr Foundation
Speakers: Roberto Cremonini; Jillaine Smith, GEO.

4. **Coaching for Change: Enhancing Leadership and Organizational Effectiveness in the Nonprofit Sector**. The Coaching and Philanthropy project was created to assess and advance the application of coaching as a strategy for building effective nonprofit organizations. Now in its second phase, the project seeks to help nonprofits and foundations understand how coaching fits as a strategy for leadership development and organizational effectiveness. This session will present recently collected research on the use and effectiveness of nonprofit coaching and discuss how grantmakers might engage in coaching for their own work with grantees. Research results will provide the basis for this interactive discussion.
Session Designer: Michelle Gislason, CompassPoint Nonprofit Services
Speakers: Michelle Gislason; Kim Ammann Howard, BTW informing change; Virginia Kellogg, Leadership That Works.

5. **A Case Study Seminar on Effective Grantmaking Practices: Social Change, Funder Collaboration and the "Achieving the Dream" Partnership.** Just three years after it began, Achieving the Dream--a nationwide initiative supported by many grantmakers--far surpassed its partners' goals to begin improving the success rates of minority and low-income students in community colleges. But it also struggled with critical questions about next steps. Part of Grantmakers for Educations' case study series on effective grantmaking, this seminar will use the Achieving the Dream initiative to help grantmakers of all sizes and issue interests reflect on the tough work of managing social-change

initiatives, ways of involving and getting buy-in from partners with different missions and agendas, and how national and local funders work together. Modeled on a traditional case-study seminar, this program will not have any formal presentations but will instead emphasize active discussion and debate among participants about the grantmaking decisions outlined in the case study. Pre-registration is required, and participants will be expected to read a case study in advance.
Session Designer: William Porter, Grantmakers for Education
Case study leader: James Honan, Harvard Graduate School of Education
Respondent: Leah Meyer Austin, Lumina Foundation for Education

Opening Luncheon Plenary

Made to Stick: How to Move From Ideas to Action. Why do some ideas thrive while others die? How do we improve the chances of worthy causes and ideas? Chip Heath, co-author of the best-seller *Made to Stick,* has helped a variety of causes and organizations — ranging from multinational companies to the World Health Organization — make their ideas "stickier." In this session Heath will discuss how grantmakers can identify the powerful stories in the field and tell them in a "sticky" way that will drive more resources and attention to the organizations and issues they care about.
Speaker: Chip Heath

Breakout Sessions Round A

1. **What's the Carrot?** Converting Ideas to Action. Each year, thousands of organizations wage social change efforts that require active support to prevail. Some of these efforts are wildly successful, but many others fall surprisingly flat. Why is it so difficult to move concerned Americans from passive support to supportive action? In this session, speakers will present highlights and key findings from Discovering the Activation PointTM, a new report that focuses on strategies for mobilizing concerned people to take supportive action. The Activation Point is the first-ever look at the tried and true work of leading thinkers on persuasion through a nonprofit lens. The result is a comprehensive guide of best practices that nonprofits, and the grantmakers that fund them, can draw on as they plan to persuade.
   Session Designer: Kristen Grimm, Spitfire Strategies
   Speakers: Kristen Grimm; Diane Tompkins, The Curious Company; Edith Asibey, Asibey Consulting.

2. **Inclusiveness: An Imperative for Effectiveness. Does inclusiveness belong among the core competencies we ascribe to effective philanthropy**? If effective grantmaking is informed by broad, deep, specific knowledge of the communities it serves, the answer is yes. If sound problem solving and capacity building requires design and delivery that considers context and multiple perspectives, then yes again.

This imperative for inclusiveness and diversity means taking a firm look -- internally and externally -- at who is at the table, what work matters and how it is carried out. Join our conversation with leaders who speak with experience on the methods, challenges and impact of this work.
Session Designer: Renee Branch, Council on Foundations
Speakers: Kristin Lindsey, Council on Foundations; Mary Mountcastle, Mary Reynolds Babcock Foundation and Z. Smith Reynolds Foundation.

3. **Lessons From the Field: Grantees' Experiences with Leadership Development Investments.** In recent years, grantmakers' knowledge and understanding of supporting nonprofit leadership development has evolved, and their investments in leadership development have become more intentional. In this session, grantees will share the surprises and challenges they experience on the receiving end of such intentional approaches in leadership development. Panelists will provide a variety of perspectives -- ranging from the evaluator to various roles in grantee leadership. They will discuss the "takeoff turbulence" of engaging in this new approach, what they gained, and how they think about building leadership in their organizations and their broader fields.
Session Designer: Linda Wood, Evelyn & Walter Haas, Jr. Fund
Speakers: Bill Ryan, Hauser Center for Nonprofits; Mary Rogier, Northern California Community Loan Fund; Shannon Minter, National Center for Lesbian Rights; Galen Leung, Asian & Pacific Islander Wellness Center.

4. **Back to the Future: The "New" New Philanthropy.** As philanthropy -- ranging from new individual philanthropists to established, staffed foundations -- grapples with today's problems, many are seeking innovative approaches to change. Yet we often focus narrowly on individual methods or projects, and remain isolated from each other, the field's history and our collective capacity for change. What are the opportunities and challenges associated with the whole spectrum of historical and current models, and what can we learn from each other? In other words, where is philanthropy today, and where might it be going? This panel will cover a number of issues, including the meaning of "strategic philanthropy" and how one practices it, measuring the social return on grants and investments, and the core question of whether philanthropists should even try to achieve large-scale social change.
Session Designer: Dara Major, GEO board of directors
Speakers: Paul Brest, William and Flora Hewlett Foundation; William A. Schambra, Hudson Institute's Bradley Center for Philanthropy and Civic Renewal; Edward Skloot, Duke University's Center for Strategic Philanthropy and Civil Society

5. **Using Networks to Increase Social Impact.** There are a number of innovative experiments underway in philanthropy to tap the power of networks. In this session, foundation leaders will describe their experiments with networked approaches; presenters will share thoughts on how the current buzz around social networks could

play out in the future; and participants will reflect on lessons being learned and the potential implications for philanthropy. How can the organizing principles of networks — openness, decentralization, bottom-up approach — be applied to grantmaking? How can grantmakers help build and strengthen networks? Is all of this resulting in greater social impact?
Session Designer: Diana Scearce, Monitor Institute
Speakers: Chris DeCardy, The David and Lucile Packard Foundation; Michael Smith, The Case Foundation; Katherine Fulton, The Monitor Institute.

6. **Challenging Conventional Wisdom: A Practical Examination of Nonprofit Finance.** While many of the trends in the evolution of nonprofit financial practices are encouraging, Nonprofit Finance Fund has found from 25 years of experience that there are a range of widely accepted funding practices that often lead to unintended consequences. NFF has dedicated significant resources to looking at these practices. Using this store of financial data and expertise, Clara Miller will engage participants in a conversation around strategies such as property ownership, endowments and revenue diversification.
Session Designer: Clara Miller, Nonprofit Finance Fund
Speaker: Clara Miller.

7. **Effectively Tapping Into the Experience and Ideas of Nonprofits and Other Stakeholders for Improved Results.** More often than not, the solutions we seek lie within the community. Engaging nonprofit and community stakeholders in grantmaking strategy promotes a shared approach to solving community-wide problems and can strengthen the relationship between grantmaker and grantee. This session will demonstrate the importance of inclusion of grantees, stakeholders, staff and board members in the development of grantmaking strategies and the critical role they must all play in determining organizational success both at the funder and grantee level. Three foundations will share their stories of how they engaged constituents and stakeholders for improved results.
Session Designer: Shawn Mooring, The Philadelphia Foundation
Speakers: Shawn Mooring, The Philadelphia Foundation; Sidney Hargro, The Columbus Foundation; Alexa Culwell, The Stupski Foundation

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Tuesday, March 11

Breakout Sessions Round B

1. **Ready to Lead? Next Generation Leaders Speak Out.** In 2007, CompassPoint, the Meyer Foundation, The Annie E. Casey Foundation and Idealist surveyed more than

5,000 25- to 40-year-old managers with at least five years of nonprofit experience to better understand their career paths and barriers that may prevent them from becoming executive directors. Their responses address several key questions: Do younger leaders currently aspire to lead nonprofit organizations? What skills and support do they need? What barriers prevent them from becoming executive directors? Are some challenges more significant for people of color? And how can grantmakers develop and support the next generation of leaders?
Session Designer: Richard L. Moyers, Eugene and Agnes E. Meyer Foundation
Speakers: Richard Moyers; Marla Cornelius, CompassPoint Nonprofit Services; Patrick Corvington, Annie E. Casey Foundation.

To download the related PowerPoint presentation click here.

2. **Race and Gender Diversity: What Difference Does it Make for Foundation Effectiveness?** What is the relationship between race and gender diversity and foundation effectiveness? Research from the Center for Effective Philanthropy has shown that male grantees have more interactions of an interpersonal nature with foundation staff during the grantmaking process than do their female colleagues. Additionally, CEP's governance research has shown that foundation trustees who identify as racial minorities perceive there to be more equality on the board only when the board has more than two trustees who identify as a member of a racial minority. Drawing on this and other research on foundation effectiveness, this session will engage participants in a discussion on the relevance of race and gender diversity and how these social constructs can impact the effectiveness of foundations and the relationships between foundations and grantees.
Session Designer: Lisa Jackson, Center for Effective Philanthropy
Speakers: Lisa Jackson; Theresa Fay-Bustillos, Levi Strauss Foundation; Victor DeLuca, Jessie Smith Noyes Foundation

3. **Facilitative Leadership in a Networked World**. If we are to believe that the world is flat and interconnected and that the "unit of action" is shifting from organizations to networks, this has implications for the way we lead as grantmakers and change agents. Increasingly, there is a call for more collective, participatory and collaborative approaches to change. In this workshop facilitators will explore elements of a collaborative model of leadership, Facilitative Leadership^R, including a framework and lanuage to understand, design and apply the collaborative change process.
Session Designer: Curtis Ogden, Interaction Institute for Social Change
Speakers: Marianne Hughes and Daryl Campbell, Interaction Institute for Social Change.

To download the related PowerPoint presentation click here.

4. **Assessing the Effectiveness of Core Support: A Grantmaker/Grantee Dialogue.** Through a candid exchange of perspectives between grantee and grantmaker, participants will appreciate the potential of core support, the importance of negotiating measurable outcomes for the grantee, and the necessity of periodic

assessments of organizational health, progress, and programmatic alignment. Grantmakers will then describe their strategies for assessing results across their grantmaking portfolios and the role that core support to grantees plays in achieving those results. The session will be highly interactive and will use the practitioner/funder conversation as a springboard for participants to examine their own experiences making and evaluating core support grants, as well as next steps for individual and collective action.
Session Designer: John Weiler, FB Heron Foundation
Speakers: John Weiler; Lynette Lee, East Bay Asian Local Development Corporation; Nancy Burd, The Burd Group

5. **Movement Capacity Building.** This session will focus on *movement* capacity building, that is, how nonprofits can work with groups and individuals to engage in collaborative decision making and community building to restructure power relationships. Presenting case examples and tools for funders, the panelists will engage the audience in a conversation about the qualities of movement-building organizations and the goal of making larger, systemic sustainable change. Some fo the issues that will be discussed include the meaning of movement, ways local communities can solve local problems and direct national policy, development of unlikely alliances, and how to address race, structural arrangements and power.
Session Designer: Frances Kunreuther, Building Movement Project
Speakers: Frances Kunreuther; Alta Starr, Ford Foundation; Maya Wiley, Center for Social Inclusion; Sylvia Yee, Evelyn and Walter Haas, Jr. Fund.

To download the related PowerPoint presentation click here.

6. **The Art of Managing Assessments.** Assessments are a common component of many funder-led capacity-building programs, but all too often grantees shudder in horror at the thought of a funder-led diagnostic process, and just as often the outcome of the process does not achieve the desired impact. Investing in a successful organizational assessment requires more than just a checkbook — it usually takes a good bit of highly engaged management. Through mini case studies, role play and other peer learning approaches, this session will build on content from the GEO-Fieldstone Alliance book *A Funder's Guide to Organizational Assessments* to explore methods for managing assessment processes that optimize the value to both the grantmaker and grantee.
Session Designer: Carol Lukas, Fieldstone Alliance
Speakers: Maria Gutierrez, CamBia Associates

7. **Web 2.0 for Grantmakers: Using New Internet Technology to Increase Philanthropic Effectiveness.** Like any new tool, information and communications technologies have early adopters, and then there are the rest of us. Find out how intrepid technology philanthropy players are using blogs, tagging, wikis and social networking sites to do their work better — and how you can follow their lead. Presenters will share the benefits and limitations of using new technologies for facilitating collaboration and communication and for organizing and disseminating information.

Participants will then have a turn exploring how they might put to use some of the more promising tools.
Session Designer: Amy Luckey, Blueprint Research & Design
Speakers: Amy Luckey; Suki O'Kane, Northern California Grantmakers; Eric Nee, Stanford Social Innovation Review.

Session Handouts:
Web 2.0 Session Handout
Web 2.0 Getting Started Worksheet

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Breakout Sessions Round C

1. **Strengthening the Core: Exploring Strategies for Developing Second-Tier Leaders.** Like in other parts of the nonprofit sector, Bay Area community development organizations face turnover among executive directors as long-term leaders prepare to retire. Through its Community Development Leadership Institute, Bay Area LISC is implementing a strategy to enhance second-tier leadership within the field. This session will look at CDLI and other strategies for "strengthening the core" of nonprofit organizations.
Session Designer: Cathy Craig, Bay Area LISC
Speakers: Linda Wood, Evelyn & Walter Haas, Jr. Fund; Catherine Merschel, East Bay Asian Local Development Corporation; Renee Okamura, organizational development consultant

2. **Philanthropic Strategies for Racial Equity.** With 100 million Americans of color, philanthropy can no longer ignore its responsibility to employ a racial equity lens to its work. This session will expose participants to the wealth of resources available to help them move their organizations and their grantees toward greater racial equity in everything they do. Participants and knowledge leaders in the field will venture beyond current thinking to explore strategies to reshape how philanthropy — individual donors, grantmakers, nonprofit and other community leaders — thinks about, practices, and sustains equitable practices that lead to social transformation.
Session Designer: Ronald A. McKinley, Fieldstone Alliance
Speakers: Brigette Rouson, Alliance for Nonprofit Management; Lori Villarosa, Philanthropic Initiative for Racial Equity; Diana Marie Lee, National Community Development Institute

3. **What Difference Are You Making? A New Culture and New Tools for Knowing the Results of Your Grantmaking.** This session will help those curious to answer the question, "As a result of your grantmaking, is anyone better off?" Participants will practice using a results framework that can help them understand the impact of their grantmaking strategies, learn from a grantee how the results framework has impacted the way they do their work, and explore how a commitment to a results framework

impacts the culture of a grantmaking organization.
Session Designer: Donna Stark, The Annie E. Casey Foundation
Speakers: Donna Stark, Tom Kelly, The Annie E. Casey Foundation; Debra Montesinos, Making Connections Oakland.

Session Handouts
Perfomance Accountability
Population Accountability,**Results Accountability Resources**
Whole Distance Exercise

4. **Stepping Out of the Maze: Private Investment Practices Applied to Effective Grantmaking**. Venture capitalists support their investments to create profits. Grantmakers support their grantees to produce positive community services or change. REDF has conducted a study to identify venture capital practices that can be adapted to improve nonprofits' funding environment. This session will focus on co-funding: a comparison of grantmakers' and venture capitalists' goals, challenges, and successes. Participants will hear from venture capital and philanthropic-giving experts and have the opportunity to test a tool that guides nonprofit grantmakers as they explore and set their own co-funding strategies. REDF will incorporate feedback from this session into the final study results.
Session Designer: Cynthia Gair, REDF
Speakers: Carla Javits, REDF; Thomas E. Backer, Human Interaction Research Institute; Chris Eyre, Legacy Venture; Fatima Angeles, The California Wellness Foundation

5. **The Power of Convening: A Small Investment with a Big Impact.** This session will explore how grantmakers can convene leaders from different nonprofits to improve cross-organization learning and opportunities for collaboration. Speakers will describe three convening approaches that seek to increase collective learning and collaboration. Participants will receive first-hand experience with methodologies that can help build relationships, foster collective learning and increase collaboration.
Session Designer: Deborah Meehan, Leadership Learning Community
Speakers: Margaret O'Byron, Consumer Health Foundation; Dianne Yamashiro-Omi, The California Endowment; Don Lauro, The David and Lucile Packard Foundation

6. **Leading to Management: The Nonprofit Performance Challenge.** The greatest act of *leadership* in nonprofit organizations is introducing *management,* and grantmakers (and boards) play a crucial role in that transition. While for-profits are often over-managed and under-led, nonprofits are commonly the reverse--over-led and under-managed. Highly effective nonprofits need both, but it is hard to strike the right balance. This session will describe the challenges and the opportunities encountered by organizations that have done so successfully.
Session Designer: Jeff Bradach, The Bridgespan Group
Speaker: Jeff Bradach

7. **What's Love Got to Do With It? Sustaining Nonprofit Performance Through Reflection and Relationship.** There are many pressures on nonprofit leaders to apply businesslike practices to their work, and there is less interest among grantmakers to support the human side of grantee organizations and leaders. This session will question the current paradigm and hypothesize that we are not fully tapping the power of inner resources and human relationships for social change. In this session, we will describe how two programs were designed to incorporate pure relationship building in the context of fundamental values like trust and love, and how participants are responding. Through the use of networking mapping and other impact data, speakers will introduce indicators of success and raise questions for participants.
   Session Designer: Patricia Brandes, The Barr Foundation
   Speakers: Patricia Brandes; M. Elena Letona, Centro Presente, Inc.; Cynthia Chavez, LeaderSpring; Barrie Hathaway, Street Tech

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Wednesday, March 12

Breakout Sessions Round D

1. **Building Capacity for Social Change in Communities of Color — Taking Theory to the Ground.** Based on more than 25 years of experience providing capacity-building services to more than 1,000 organizations, the National Community Development Institute has developed a framework and methodology for building social change in communities of color. NCDI will present this framework and how it has played out on the ground. Grantmakers and practitioners will share their experiences applying this framework and engage participants in a dialogue about how to invest in capacity-building resources to have enduring impact in communities of color.
   Session Designer: Beth Rosales, National Community Development Institute
   Speakers: Tonya Allen, The Skillman Foundation; Faye McNair-Knox, One East Palo Alto; Kelley D. Gulley and Frank Omowale Satterwhite, National Community Development Institute

2. **Linking Grantmaking for Leadership Development to Organizational Effectiveness.** Leadership is critical to nonprofit success, and foundations can play a unique role to empower leaders and help them advance their organizations' missions. However, most leadership development programs do not consider the professional growth of a leader in the context of the organization's capacity-building needs or priorities. How can the development of a leader and organization go hand in hand? This session will present findings from various evaluation and research studies aimed to demonstrate the connection between investments in leadership and organizational effectiveness. Panelists will explore how necessary leadership skills and competencies change depending on the organization's lifecycle stage, the role of nonprofit coaching for leadership development and organizational capacity building, and evaluating leadership

development for social change.
Session Designer: Kate Dewey, Dewey & Kaye
Speakers: Kate Dewey; Kim Ammann Howard, BTW informing change; Kathy Toner,
The David and Lucile Packard Foundation; Grant Oliphant, Heinz Endowments

3. **Foundation Transformation for Community Transformation: Lessons Learned from Place-Based Grantmaking.** Foundations of all types and sizes are experimenting with place-based grantmaking strategies to catalyze long-term, large-scale community change. Grantmakers are coming to the same conclusions — successful place-based grantmaking requires flexibility, humility, responsiveness, a learning focus, and a dedication to engaging the appropriate stakeholders and partners. This session will explore the significant changes in foundation structure, processes, and practices that have occurred at two foundations engaged in place-based grantmaking.
Session Designer: Marie Colombo, Skillman Foundation
Speakers: Carol Goss, Skillman Foundation; Prudence Brown, independent consultant;
Lise Maisano, S.H. Cowell Foundation; Susan Curnan, The Heller School for Social
Policy and Management at Brandeis University

4. **Beyond Strategic Planning — Helping Grantees Make Good Strategic Decisions.** Should funders require strategic planning of grantees? Or should funders help grantees consider alternative approaches to forming strategies? What is the difference between having a strategy and having a plan? This session will combine a discussion of the benefits and pitfalls of strategic planning with an overview of new approaches to formulating strategy. The session is based on David La Piana's new book, *The Nonprofit Strategy Revolution,* which reports the results of a four-year research and development effort. Participants will get a sneak preview of the results and have an opportunity to discuss the ramifications of this research for their own strategic planning grant support.
Session Designer: David La Piana, La Piana Associates
Speakers: David La Piana, Vance Yoshida, Liza Culick, La Piana Associates

Session Handouts
La Piana Associates Firm Overview
Real Time Strategic Planning
Real Time Strategic Planning Cycle

5. **Whose Story Are You Telling? Putting the Public into the Picture.** As foundations and nonprofits strive to make change while doing well, it's crucial to connect with the priorities of the target publics served. Using recent national and local market research in the out-of-school-time area, this session highlights ways grantmakers can improve results by better understanding and engaging the people they serve. Strategic market research for out-of-school-time planning has helped replace assumptions with facts, built stakeholder buy-in and support, and given the ultimate beneficiaries — parents and children — a voice to express their needs.

Session Designer: Mary Trudel, The Wallace Foundation
Speakers: Ruth Wooden, Public Agenda; Julie Pokela, Market Street Research; James Chesire, Children Youth and Services/After School Matters

6. **Reflection and Redesign: Using Learnings to Transform Strategy and Capacity.** Evaluation is an essential component of strategy development and execution, both for grantmakers and grantees. Many grantmakers are now conducting evaluations to assess outcomes and impact of their work. However, transforming evaluation data into action that leads to improved results has proven to be a bigger challenge. This session will share early experiences by two foundations to become more outcomes oriented and to create an internal culture that supports learning to improve foundation strategy and results.
Session Designer: Martha Campbell, The James Irvine Foundation
Speakers: Martha Campbell; Don Howard, The Bridgespan Group; Fay Twersky, The Bill and Melinda Gates Foundation.

7. **Social Enterprise: A Strategy for Self-Sustaining Nonprofits?** Is it true that funders can help grantees become "self-sufficient" by making strategic investments in nonprofit social enterprises? Increasing numbers of funders are interested in and being asked to fund nonprofits' efforts to develop and run social enterprises as a way to reduce their dependence on fund-raising. However, one recent study of nonprofit-launched earned income ventures revealed that few enterprises have actually made any money. Drawing on the experience of funders who have supported social enterprises over the past fifteen years and leaders of successful social enterprises, this session will highlight the pitfalls and possibilities for funders in supporting social enterprise.
Session Designer: Melinda Tuan, Rockefeller Philanthropy Advisors
Speakers: Melinda Tuan; Tess Reynolds, New Door Ventures; Jim Schorr, University of California at Berkeley

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Breakout Session Round E

1. **Coaching Grantees to Build Evaluative Capacity**. What would it be like if grantmakers coached grantees to become experts in defining their own evaluation questions and themes to yield the most valuable insights? Talking with two teams, each comprised of a grantmaker, evaluator and community based organization, attendees will discuss the practices that most effectively bring grantees into the evaluation process, foster more collaborative relationships that make evaluation less threatening, and yield better insights about the work of all three. This session will allow participants to hear from and ask questions in the context of real evaluation capacity building projects.
Session Designer: Annemarie Riemer, Hartford Foundation for Public Giving
Speakers: Anita Baker, Anita Baker Consulting; Amy Studwell, Hartford Foundation for Public Giving; Yvette Bello, Latino Community Services, Inc.; Toni Freeman, The Duke

Endowment; Philip Redmond, The Duke Endowment; Elizabeth Ralston, Dee Norton Lowcountry Children's Center

2. **Funder Partnerships: What Happens When Grantmakers Come Together for the Benefit of their Community?** How can grantmakers — working toward increasing nonprofit capacity but in different ways — effectively partner in a way that is truly beneficial to their community and themselves? This session will explore three different models of grantmaker-grantee collaborations and the common elements that contribute to improved nonprofit results. Participating initiatives include the BEST Project, The Rochester Effectiveness Partnership and Zip Code Assistance Ministries Organizational Development Program.
Session Designer: Jennifer Acree, BEST Project
Speakers: Kathi Horton, Community Foundation of Greater Flint; Beth Bruner, Bruner Foundation; Carolyn Watson, Rockwell Fund

3. **Working with Intermediaries**. With ambitious plans and sometimes limited resources, many grantmakers are enlisting the help of intermediary organizations. Intermediaries can help with a variety of work – from research to regranting to execution of capacity building programs. Intermediaries can offer needed expertise, connections, and delivery capacity, increasing the potential impact of grantmaking dollars. Forging a strong relationship with intermediaries involves careful planning, shared decision making, agreements regarding confidentiality and reporting, and two-way accountability. This session will explore types of relationships, share findings from research on success factors and red flags, provide case examples to dissect and encourage audience stories and experiences.
Session Designer: Carol Lukas, Fieldstone Alliance
Speakers: Carol Lukas; Gladys Washington, Mary Reynolds Babcock Foundation

4. **Taking the Plunge — With a Life Jacket: Three Promising Practices in Policy and Advocacy Grantmaking**. Grantmakers are increasingly supporting advocacy and policy change efforts with the goal of bringing about long-term, systemic social change. This type of grantmaking, however, poses a number of challenges — long timeframes for change, real and perceived restrictions on lobbying, potential undesired visibility and risk of failure. This session will engage grantmakers by examining three promising practices grantmakers are using to cope with the challenges: 1) shifting the way grantmakers perceive their role in advocacy efforts, 2) increasing internal dialogue about risk, and 3) using evaluation methods geared specifically for advocacy and community organizing work.
Session Designer: Justin Louie, Blueprint Research and Design Speakers: Justin Louie; Julie K. Kohler, Communities for Public Education Reform; Katherine Peck, Gill Foundation

5. **Designing Grants Programs to Promote Field Building: A World Café Conversation.** How can a funder mobilize resources to advance an entire field? What lessons can both large and small grantmakers apply to their work in capacity building? These questions will frame an interactive session that will explore the experience of the Community Clinics Initiative (a joint project of Tides and The California Endowment) and then engage participants in a World Café process to exchange and synthesize lessons from their work.
   Session Designer: Tom David, Community Clinics Initiative
   Speakers: Ellen Friedman, Tides; Jane Stafford, Community Clinics Initiative; Ralph Silber, Alameda Health Consortium

6. **Forces for Good: The Six Practices of High-Impact Nonprofits.** What makes great nonprofits great? Four years ago, the authors of Forces for Good set out to find the answer. The authors studied a dozen nonprofits that have achieved significant results at national and international levels, including the well-known (Habitat for Humanity), the less-well known (Self-Help), and the surprising (The Heritage Foundation). Their findings have important implications for how leaders run and philanthropists fund nonprofit organizations — particularly donors who seek to maximize the social return on their charitable dollars.
   Session Designers: Heather McLeod Grant, Stanford Center for Social Innovation and Leslie Crutchfield, Ashoka
   Speakers: Heather McLeod Grant, Leslie Crutchfield

7. **The Cultural Data Project: Lessons Learned**. The Cultural Data Project, a state-wide data collection and management tool for cultural organizations, standardizes the financial segment of grant application processes and provides multiple ways for organizations to track trends over time and benchmark data against peers. The CDP launched in Pennsylvania in 2004, in Maryland in 2007 and will launch in California in 2008. The panel will discuss what has been involved in bringing the project to other states, lessons learned, research products, and progress made to inform best practices in management and capacity building.
   Session Designer: Barbara Lippman, The Pew Charitable Trusts
   Speakers: Barbara Lippman; Moy Eng, The William and Flora Hewlett Foundation; John McGuirk, The James Irvine Foundation

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