IN THE SPOTLIGHT

GRANTS MANAGERS NETWORK

12th Annual Conference
March 20–22, 2017
Hollywood, California
GMN2017—There’s a NEW app for that!

Sponsored by: Weingart Foundation

#GMN2017 is available at your fingertips using our brand new conference app! Use the app to build your schedule, find resources and speakers, connect with other attendees, and get conference updates.

Follow these steps to get started:

**Download Steps**

1. Search your app store for “GMN Annual Conference” and install the app. (In a browser: https://appsto.re/us/e8DIfb.i for iPhone and iPad and http://bit.ly/2IkLPWl for Android.)
2. Open the app and click the “Log In” link at the top right.
3. The first time you use the app, you’ll need to create an account. Enter the email address you used to register for the conference, a password, and your first and last name. Click the “Sign Up” button.
4. Click the GMN2017 image and the “Select This Event” button.
5. A confirmation message will be sent to your email account. Click the link to verify your new app account.

Or, access through your browser at http://www.eventsential.org. Find the GMN button and enter your login information.

**App Features**

- Choose your profile preferences—directory listing, email display, and availability for messaging. You can change these selections at any time by clicking on the circle with your initials.
- Explore the schedule, speaker list, attendee directory, exhibitor list, maps, and more by using the bottom menu bar (iPhone) or menu bars in the top left corner (Android).
- Create your schedule using the session list, and add your personal appointments and notes.
- Filter the schedule by learning track, session block, level, and/or day to find the sessions of interest to you.
- Use the Activity and Photo Feed to tag a session and add your thoughts and photos, or to see what other attendees are up to.
- In the exhibitor roster, create a list of must-see companies, and add your notes for after-conference follow-up.
- Be sure to download the “GMN Connect” app so you can quickly link to the GMN2017 conference community on Connect.

But Wait, There’s More!

If you have questions about the app before the conference or onsite, please contact Carolyn Sosnowski, GMN’s content manager, at csosnowski@gmnetwork.org or visit the GMN table in the Exhibit Hall. Don’t forget: you can download or update your app at our complimentary Internet Corner, sponsored by MicroEdge.
Welcome!

It is a pleasure to welcome you to the 2017 Annual Conference in Hollywood, California. For the next three days, you, your colleagues, and the work you do will be In the Spotlight!

This is a very exciting time for philanthropy, but also for grants managers and Grants Managers Network—now known as PEAK Grantmaking! We are thrilled to share our new name and the evolution of this organization with you at this special conference gathering. (You’ll hear more about PEAK Grantmaking at the Opening Plenary.)

The people around you at this conference are leaders and change agents in their organizations, with roles and responsibilities ranging across such varied functions as tracking outcomes, using technology and data to drive improvement, and making sure grantmakers are adopting proven practices to ease the burden on grantees, just to name a few. **Now more than ever before, grantmaking practices are in the spotlight.** From effective streamlining to data analysis and knowledge management, practices are being seen as the work that defines grantmaking.

We hope you enjoy and take home substantial knowledge from the 50+ breakout sessions, short talks, roundtables and three exceptional plenaries we have planned. Please join us in thanking the volunteers, speakers, and staff who have made this conference a true, red-carpet event! We also extend our thanks to the sponsors and exhibitors for their support of this event and the profession.

Thank you for joining us in Hollywood and for being part of this network, which continues at the heart of the organization. Please share your feedback and ideas with our board and staff throughout the conference so that we can make this, and future events, as valuable as possible to you and your organization.

Again, welcome!

Michelle Greanias
Executive Director
PEAK Grantmaking

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**Make Connections and Expand Your Network**

This year’s conference includes a number of events and opportunities for you to network with your fellow attendees:

- Connections Committee Happy Hour
- Game Night
- Morning Walks & Runs
- Exhibit Hall
- Scavenger Hunt
- Speed Networking
- Regional Meetings
- Opening Reception
- Volunteer Reception
- Dine Arounds
- Post-Conference Event
Acknowledgments

The Conference Committee and the Board of Directors would like to thank the following individuals and organizations for their support in making this conference possible:

**Angela Carr**
Weingart Foundation

**Conference Sponsors**

**Conference Exhibitors**

**Jon-Michael Hice**
SAG-AFTRA Foundation

**Marva Lewis McKnight & Melissa Mims**
The Event Professionals

**Speakers and Presenters**

**Southern California Regional Chapter**

And all grants management professionals who volunteer and contribute to the knowledge and skills that make this network possible.

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The Board of Directors would like to acknowledge the following individuals for their hard work and commitment that made this conference possible. The Board also would like to thank the Co-Chairs, Session Designers, On-Site Assistants, and Connections Committee members’ employers for their support of this volunteer effort.

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Health Spark Foundation

**Richard Marker**
Wise Philanthropy
Visit Our Exhibit Hall
The most active spot at GMN’s Annual Conference

Take a moment to check out all the action in the Exhibit Hall where you can:

- Learn about valuable products and services to make your life easier and improve your grantmaking practices
- Grab a cup of coffee and a snack!
- Sign up for Dine Arounds
- Check your email at our complimentary Internet Corner Sponsored by MicroEdge
- Complete your Exhibitor Bingo Card (included in registration packet) for a chance to win valuable prizes!

Exhibitors

![Exhibitor Logos]
SUNDAY, MARCH 19

9:00 am – 5:00 pm
Data Boot Camp Workshop
Sponsored by the James Irvine Foundation
ROOM: RUNYON-LAUREL
#GMN2017 #bigdata #databootcamp @meansandrew
Andrew Means, Head, beyond.uptake

GM101 Workshop
Sponsored by the Campion Foundation
ROOM: STUDIOS D & E
#GMN2017 #GM101 @peakgrantmaking
Marcus McGrew, Director of Program Operations and Information Management, The Kresge Foundation
Genise T. Singleton, Program Operations Manager, The Kresge Foundation

1:00 pm – 5:00 pm
Communicate Your Strategic Value Workshop
ROOM: SOLANO
#GMN2017 #strategicvalue @dorieclark
Dorie Clark, Marketing Strategy Consultant

2:00 pm – 5:00 pm
Conference Registration
LOCATION: MEZZANINE

5:30 pm – 7:00 pm
Happy Hour
LOCATION: HOTEL LOBBY
Join other early arrivals for a drink in the hotel bar. (Pay your own tab.)

8:00 pm – 10:00 pm
Hollywood Game Night
Sponsored by California Wellness Foundation
LOCATION: ELYSIAN PARK
Join your peers for an evening of fun and games before the conference starts. Light snacks and beverages will be served.

MONDAY, MARCH 20

7:00 am – 5:00 pm
Conference Registration
LOCATION: MEZZANINE

7:00 am – 7:45 am
California Wellness Walk & Run
LOCATION: MEET IN HOTEL LOBBY

7:30 am – 9:00 am
Breakfast and Networking
ROOM: SALONS 1, 2 & 3

8:00 am – 5:00 pm
Exhibit Hall and Member Lounge Open
Sponsored by WizeHive
ROOM: STUDIOS A, B & C

8:00 am
Scavenger Hunt Begins
Sponsored by INTL FCStone
#GMN2017 #GMN2017hunt
Put some FUN in the grantmaking fundamentals you’re learning by participating in our annual scavenger hunt. Join a team to network with new friends; prizes will be awarded on Wednesday!

9:00 am – 10:30 am
Opening Plenary
Sponsored by GHR Foundation
ROOM: SALONS 1, 2 & 3
#GMN2017 @peakgrantmaking
Grants Managers Network is now PEAK Grantmaking! We are thrilled to share with you the exciting details of our new name and how the network you know and love will still be the same but with new strategies and ambitions to raise the profile of grantmaking and grants management professionals.

10:30 am – 10:45 am
Networking Break
CONFERENCE SCHEDULE

10:45 am – 12:00 pm
Concurrent Block A
Connecting Practices to Values-Based Grantmaking
ROOM: STUDIO E
Corporate Community Engagement Working with Business Units/Groups: How to Bring Alignment and Engagement from Businesses and Employees
ROOM: ECHO PARK
Embracing the Best Practices: How Grantmakers Are Using the Standards for Excellence® in Their Capacity Building and Due Diligence Efforts
ROOM: SOLANO
The Future Is Now: Incorporating Predictive Analytics into Outcomes Analysis
ROOM: MT. OLYMPUS

Global Funding of Fiscal Intermediaries
ROOM: WHITLEY HEIGHTS
Optimizing Your Grants Management Process
ROOM: DOLBY BALLROOM
Step Away from the AS IS—Maximize Your Investment in Grants Management Software
ROOM: STUDIO D
Simplify Grantmaking with Data Sharing Tools
ROOM: LOS FELIZ
Youth Giving Is a Philanthropic Force
ROOM: FRANKLIN HILLS
PARTNER SPONSORED SESSION

12:00 pm – 12:15 pm
Networking Break

12:15 pm – 1:15 pm
Lunch and Networking
Sponsored by CAF America
ROOM: SALONS 1, 2 & 3

1:15 pm – 1:30 pm
Networking Break

1:30 pm – 2:45 pm
Concurrent Block B
The Art of Compliance: Effectively Communicating Complex Grantmaking Concepts
ROOM: SOLANO
Belief Alignment for High-Performing Teams
ROOM: SILVER LAKE
Beyond Direct Grants: Legal Structures for Philanthropic Funding
ROOM: STUDIO D
Case Study in Implementing a New System
ROOM: WHITLEY HEIGHTS
Connecting Practices to Values-Based Grantmaking
ROOM: STUDIO E
Leading from the Middle: From Grants Management to Knowledge Creation
ROOM: MT. OLYMPUS

Lessons Learned—The Challenge of a Healthier Louisiana: Tackling Obesity through Collective Impact Grantmaking and What We Learned Along the Way
ROOM: ECHO PARK
Hot Topics in International Grantmaking and the SDGs
ROOM: LAUREL
Owning the Room—At Ease in the Spotlight: A Focus on Nonverbal Communication
ROOM: FRANKLIN HILLS
Spotting the Missing Tech in Grant Proposals
ROOM: LOS FELIZ
PARTNER SPONSORED SESSION

2:45 pm – 3:00 pm
Coffee Break in the Exhibit Hall
Sponsored by Mutual of Omaha Foundation

3:00 pm – 4:15 pm
Concurrent Block C
The 8 Habits of Highly Effective Grants Managers
ROOM: MT. OLYMPUS
Evaluation: Creating a Way to Measure Impact
ROOM: WHITLEY HEIGHTS
From Data to Dashboard
ROOM: ECHO PARK
From Piles to Smiles—Making Reporting Work
ROOM: STUDIO D
Grantmaking: Investing in Change
ROOM: STUDIO E

Grantmaking Toolkit: Intermediary Partners
ROOM: FRANKLIN HILLS
Improv Comedy for Grantmakers (Seriously!)
ROOM: LOS FELIZ
Is Being a Consultant the Next Move in Your Career?
ROOM: SILVER LAKE
PARTNER SPONSORED SESSION

4:15 pm – 4:30 pm
Networking Break

4:30 pm – 5:30 pm
Speed Networking/Regional Meetings
Sponsored by California Wellness Foundation

Speed Networking
ROOM: SOLANO
Bring lots of business cards to this event, where you’ll be meeting as many colleagues as possible in a speed networking exercise that gives you just a few minutes to share your details and learn more about your peers.

Regional Meetings
ROOM: VARIOUS
Come together with other members from your region to hear about local news and events, meet your regional chapter officers, or volunteer to help guide your local chapter. Check the app and look for a handout to find the room for your regional chapter meeting.

5:30 pm – 5:45 pm
Networking Break

5:45 pm – 7:15 pm
Opening Reception
Sponsored by Annenberg Foundation
ROOM: ANNEX (5TH LEVEL)

#GMN2017 @peakgrantmaking
Celebrate another exceptional conference with all your colleagues at this opening reception. We’ll have food and drinks, plus we’re repeating the fun photo booth that was such a hit last year. Get ready for your close-up!
TUESDAY, MARCH 21

6:30 am – 7:15 am
California Wellness Walk
LOCATION: MEET IN HOTEL LOBBY

7:00 am – 5:00 pm
Conference Registration
LOCATION: MEZZANINE

7:00 am – 8:15 am
Breakfast and Networking
ROOM: SALONS 1, 2 & 3

8:15 am – 11:00 am
Site Visits
LOCATION: OFFSITE. MEET IN HOTEL LOBBY.

Find out what grantmaking looks like in action. Thanks to the generosity of the Annie E. Casey Foundation, each site visited will receive a donation from PEAK Grantmaking for sharing their work with us today. Site visits require pre-registration and pre-payment to join.

Site Visits
• Covenant House
• Homeboy Industries
• Inner City Arts
• LA Kitchen
• Los Feliz Charter School for the Arts

11:00 am – 5:00 pm
Exhibit Hall and Member Lounge Open
Sponsored by WizeHive

11:00 am – 11:15 am
Networking Break

11:15 am – 12:30 pm
Concurrent Block D

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12:30 pm – 12:45 pm
Networking Break

12:45 pm – 1:45 pm
Lunch Plenary: Red Carpet Philanthropy: Funding and Fundraising in the Entertainment Industry
ROOM: SALONS 1, 2 & 3

Philanthropy in Hollywood includes unique opportunities and challenges. Hear from panelists, including working actors, and gain insight into the dynamics of using star power for funding and fundraising programs and projects that benefit the general public and members of the acting community.

Participants will:
• Gain a deeper understanding of the opportunities and challenges of leveraging celebrity support
• Become familiar with the variety of supports made available to the community of actors in need
• Learn about the role of social media in entertainment philanthropy

1:45 pm – 2:00 pm
Networking Break
2:00 pm – 3:30 pm
Roundtable Discussions
ROOM: VARIOUS; check the app and look for a handout for specific locations

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3:30 pm – 3:45 pm
Coffee Break in the Exhibit Hall
Sponsored by NGOsource

3:45 pm – 5:15 pm
SHORT TALKS

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<td>Round 2 Q&amp;A</td>
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The Good, the Bad, and the Ugly: What Story Does Your 990 Tell About Your Foundation?
ROOM: STUDIO E

Incorporating DEI in Grantmaking: From Theory to Practice
ROOM: WHITLEY HEIGHTS

The Lifecycle of Your Grant Data
ROOM: MT. OLYMPUS

One Foundation’s Journey into Developing an Impact Assessment Framework
ROOM: LOS FELIZ

Owning Our Power at Work
ROOM: SILVER LAKE

Pennies for Progress: A Decade of Boom for Philanthropy, A Bust for Social Justice
ROOM: STUDIO D

UN Sustainable Development Goals: Understanding the Role
ROOM: FRANKLIN HILLS

Un-Restrict Support! An Innovative Approach to Funding
ROOM: ECHO PARK

Youth Giving Is a Philanthropic Force
ROOM: SOLANO

6:45 pm – 8:45 pm
Dine Arounds
LOCATION: OFFSITE. MEET IN HOTEL LOBBY.
Join your colleagues for a fun, informal night on the town.
Sign up in the Exhibit Hall.
10:30 am – 12:00 pm
Closing Plenary: Vu Le
Sponsored by The Leona M. and Harry B. Helmsley Charitable Trust
ROOM: SALONS 1, 2 & 3
#GMN2017 #vule @nonprofitwballs

The Role of Grantmakers in the Coming Apocalypse
The challenges facing our world are numerous, and increasing by the day. Is our sector prepared? Grantmakers have an important role to play, but we must reexamine the philosophies and practices that have been preventing nonprofits from doing their work. We will discuss the unconscious mindsets and values that drive grantmaking, the urgency of doing things differently, and the actions we must all take to ensure an equitable world. Vu Le, writer behind the blog nonprofitwithballs.com and executive director of Seattle-based social justice organization Rainier Valley Corps, will present a provocative perspective from a nonprofit’s point of view. Don’t worry, he will also have pictures of baby animals, so it can’t be all that bad. Be prepared to laugh and think, and go “awwww!”

Vu Le is the author of the blog nonprofitwithballs.com and Executive Director of Seattle-based nonprofit Rainier Valley Corps, which has the mission of tackling systemic injustice by developing leaders of color, strengthening organizations led by communities of color, and fostering collaborations between diverse communities. He loves nonprofit work, has extensive experience in all aspects of it after nearly a decade of being an executive director, and thinks nonprofit professionals are amazing and brilliant and good-looking. Outside of work, Vu watches way too much TV—Game of Thrones, Walking Dead, Archer, Golden Girls, stop judging—and spends time with his wife and two small children, ages 3 years and 6 months.
Corporate Community Engagement Working with Business Units/Groups: How to Bring Alignment and Engagement from Businesses and Employees

LEARNING TRACK: EFFECTIVE PRACTICES
LEVEL: GENERAL
ROOM: ECHO PARK

#GMN2017 #community #engagement
Kim Armstrong, Community Programs Manager, Mutual of Omaha Foundation
Stacey Smida, Grants Manager, Cargill

In this session, learn how companies develop focus areas to improve strategic community engagement to bring opportunities around common corporate themes and priorities which allow for locations/businesses to have autonomy to engage in what matters most in their communities and serve their employee needs. Why does it matter that there is alignment and engagement at the local level? This session will focus on sharing best practices to develop signature partnerships or themes (World Food Day / Hunger Action Month) that are corporate initiatives but driven locally. Uniting to bring common messaging and story-telling to raise the visibility locally and with your employees.

Participants will:
• Understand how to bring corporate initiatives to what matters to employees and communities
• Receive tips on tools and resources that corporate can develop and make locally relevant
• Learn to communicate with one voice and speak to employees and communities
Embracing the Best Practices: How Grantmakers Are Using the Standards for Excellence® in their Capacity Building and Due Diligence Efforts

LEARNING TRACK: EFFECTIVE PRACTICES
LEVEL: GENERAL
ROOM: SOLANO

Heather Lamey, Director of Donor Grants and Standards of Excellence, Community Foundation of Northeast Alabama
Jennifer Maddox, President and CEO, Community Foundation of Northeast Alabama
Amy Cootes Madsen, Director, Standards for Excellence Institute

This session will introduce a set of best practices for nonprofit management and governance as outlined in the Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector®. It will also illustrate exemplary standards through real examples, and review the tools, resources, learning opportunities, accreditation and recognition available to assist nonprofit management and the grantmakers that support them. This session will also include a discussion and overview of a case study describing how the Community Foundation of Northeast Alabama has utilized the resources of the Standards for Excellence® program to help strengthen grantees, quality of management, leadership and service in its community.

Participants will:
• Learn how grantmakers can support the efforts of nonprofits to become well-governed and responsibly managed organizations who improve their operations, governance, and long-term sustainability
• Discover programs grantmakers can utilize as they streamline their due diligence efforts while encouraging strong nonprofits
• Understand how nonprofits struggling with issues related to board governance, volunteerism, financial responsibility, management and program evaluation can improve
• Become aware of how to access and utilize the resources, tools and skills available to assist organizations in modifying their management strategies and practices

The Future Is Now: Incorporating Predictive Analytics into Outcomes Analysis

LEARNING TRACK: DATA INTELLIGENCE • EFFECTIVE PRACTICES • OUTCOMES/EVALUATION
LEVEL: GENERAL
ROOM: MT. OLYMPUS

John McConnell, Founder, Analytical People

Most grantmakers today recognize the importance of outcomes analysis, but many don’t realize that it’s only a starting point in their analytics journey. The next, and arguably more important, step is incorporating predictive analytics into the equation. Many don’t understand predictive analytics and, more realistically, most don’t know how to get started with it and what steps to take. This presentation will review the steps in leveraging predictive analytics—from business objective through to deploying predictive analytics. By looking at the Cross Industry Standard Process for Data Mining (CRISP-DM) approach, this session will provide a roadmap for implementing predictive analytics into foundations and nonprofits. The methodology consists of six distinct phases and offers a set of guideposts for predictive analytics: business understanding, data understanding, data preparation, modeling, evaluation, and deployment.

Global Funding of Fiscal Intermediaries

LEARNING TRACK: COMPLIANCE
LEVEL: ADVANCED
ROOM: WHITLEY HEIGHTS

A. Nicole Campbell, Senior Director of Operations and Foundation Counsel, Dalio Foundation
Paige Granger, Grants Officer, Open Society Foundations
Marla López, Grants Officer, Open Society Foundations

This session will help you understand the role and structures of both domestic and international fiscal intermediaries in foundation grantmaking. The session will also provide you with the tools to maximize your foundation’s ability to support important work through fiscal intermediaries, while adhering to U.S. tax law and economic and trade sanctions.

Participants will learn:
• The advantages and disadvantages of funding fiscal intermediaries
• The legal concepts and tax implications of frequently used fiscal intermediary structures
• Best practices in structuring funding to different types of fiscal intermediaries
Optimizing Your Grants Management Process

**LEARNING TRACK:** EFFECTIVE PRACTICES  
**LEVEL:** ADVANCED  
**ROOM:** DOLBY BALLROOM

@GMN2017 #GMprocess

**Lisa Nespeca, Owner, ChangeVantage Consulting**

How long has it been since you took a look at the grants management process of your organization? Just because things have always been done a certain way does not mean they should always be done that way in the future! Come learn why streamlining and optimizing your process is so important. Learn about tools you can use to help you facilitate this process.

Step Away from the AS IS—Maximize Your Investment in Grants Management Software

**LEARNING TRACK:** TECHNOLOGY  
**LEVEL:** ADVANCED  
**ROOM:** STUDIO D

@GMN2017 #GMsoftware

**Danette Peters, CEO, Onyx Consulting LLC**

Grants management software is an expensive investment. Choosing and implementing it is a time-consuming project that can be an expensive investment. Choosing and implementing it is a time-consuming project. Organizations often think that moving their current processes to a new system will magically make everything better, but making things better requires more than just choosing a new system.

**Participants will:**

- Understand why goals are needed and how to develop them for the project
- Learn why an organization should improve current business processes and practices before choosing software, and how to use your goals to drive redesign
- Learn how to build acceptance for the new system and how to set a realistic project timeline and budget

Simplify Grantmaking with Data Sharing Tools

**LEARNING TRACK:** OUTCOMES/EVALUATION  
**LEVEL:** GENERAL  
**ROOM:** LOS FELIZ

@SimplifyNow @TAGtechorg

**Poney Carpenter, Project Manager, Simplify Initiative**

The Technology Affinity Group’s Simplify Initiative promotes the adoption of 30+ tools which facilitate data sharing to simplify the grantmaking process. In this session, we will look at a variety of tools which help share nonprofit data, share funder data, and improve funder processes. For each tool, we’ll dive into what it does, the benefits it can provide, and what is involved with implementing it within your organization. The list of tools we’ll discuss includes several web applications and APIs from GuideStar and the Foundation Center, the new BRIDGE ID system, the Cultural Data Project, NGOSource, the International Aid Transparency Initiative, digitalIMPACT.io, and others.

**Participants will:**

- Develop an understanding of the different tools available to help share nonprofit data, share funder data, and improve funder processes
- Identify which tools might be of direct benefit to your organization
- Understand what effort would be required to implement and use those tools

Youth Giving Is a Philanthropic Force

**LEARNING TRACK:** EFFECTIVE PRACTICES • HOT TOPICS  
**LEVEL:** GENERAL  
**ROOM:** FRANKLIN HILLS

@GMN2017 #youthgiving

**Jen Bokoff, Director of Knowledge Services, Foundation Center**  
**Amanda Dillon, Knowledge Services Manager, Foundation Center**

Young people worldwide are transforming their communities and themselves by making grants—more than $14 million worth since 2001—to causes they’re passionate about. In this session, participants will get a summary on what the data shows about youth grantmaking, then hear a conversation about two youth grantmaking programs that reveal the ins and outs of their work. Grants managers will learn practical tips and ideas on how to integrate this form of participatory grantmaking.

**Participants will:**

- Make the most of the information on Foundation Center’s YouthGiving.org regardless of whether you’re brand new to youth philanthropy or a seasoned veteran
- Learn how the data that you manage is critical to understanding the current state of philanthropy and shaping its future
- Learn practical tips and get ideas on how to integrate more participatory grantmaking into your work

**PARTNER SPONSORED SESSION**

**Bromelkamp: CRM for Grantmaking: It’s About More Than Relationships**

**LEARNING TRACK:** PARTNER SPONSORED SESSION • TECHNOLOGY  
**LEVEL:** GENERAL  
**ROOM:** NICHOLS

@GMN2017 #GMrelationships @bromelkampco

**Henry A. Bromelkamp, President, Bromelkamp Company LLC**

Grants management systems have existed for several decades, but many have not evolved beyond the routine tasks of recording and processing transactions. The newest technologies available not only allow you to manage transactions but also document and help cultivate relationships with grantees, collaborators, donors, and other stakeholders. CRM (customer relationship management) systems come in various shapes and sizes, but the best among them offer several core functions to take your grants program to the next level: relationship-focused activity tracking, automated workflows and robust integration with office software and third-party data. Join us for a conversation about how your grants management can go beyond transactions and help you build your community.

**Participants will:**

- Gain an understanding of how CRM applies to grants management
- Learn how a CRM system can be used to increase efficiency
- See how CRM integration can streamline data management
Grantmaking for Great Results

The Campaign for Excellence in Grants Management has made possible GMN’s ambitious plans to move grants management and the overall field of philanthropy to higher levels of performance.

The Campaign, a first for GMN, reflects a growing understanding that getting the “how” of philanthropy right is essential for grantmakers to maximize their impact and build trust with grantees, the public, policymakers and other audiences.

As the Campaign draws to a close in 2017, we are grateful to the GMN Board of Directors, Campaign Task Force, and funders who have invested in our work and believe in our ability to improve grantmaking.

“We believe strong grantmaking practice is integral to creating successful outcomes across all of what we do. We’re pleased to see GMN take the lead in helping to build and elevate the profession as the field moves beyond compliance to a greater focus on data, information, and knowledge.”

—Darren Walker, President, Ford Foundation

“Grants management is an intrinsic and ever more important part of effective grant making, and grant managers play an important part in everything we do—from ensuring transparency to monitoring and tracking progress to helping us refine our strategies and goals. GMN is a critical institution in this process.”

—Larry D. Kramer, President, The William and Flora Hewlett Foundation


### Leadership Gifts

- Bill & Melinda Gates Foundation
- Ford Foundation
- The William and Flora Hewlett Foundation
- Robert Wood Johnson Foundation
- Kresge Foundation

### Major Gifts

- The Annie E. Casey Foundation
- Conrad N. Hilton Foundation
- Houston Endowment
- Ewing Marion Kauffman Foundation
- W.K. Kellogg Foundation
- John D. and Catherine T. MacArthur Foundation
- Charles Stewart Mott Foundation
- Surdna Foundation

### Special Gifts

- The Barr Foundation
- The California Endowment
- Irene E. & George A. Davis Foundation
- Walter & Elise Haas Fund
- Heising-Simons Foundation
- Mutual of Omaha Foundation
- Skoll Foundation

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"At Kresge, grants management works at the very nexus of our program, social investment, finance and communication functions, extracting and leveraging data to inform strategic decision making and foster organizational learning. GMN plays a vital role extrapolating these learnings from a broad spectrum of philanthropic institutions and sharing them with an eye toward enhancing the impact of our sector."

—Rip Rapson, President and CEO, The Kresge Foundation
The Art of Compliance: Effectively Communicating Complex Grantmaking Concepts

LEARNING TRACK: EFFECTIVE PRACTICES
LEVEL: GENERAL
ROOM: SOLANO

Damon James, International Grants Administration Officer, Silicon Valley Community Foundation
Christine Morrisette, Director, Grants Administration, Silicon Valley Community Foundation
D. Lea Rauscher, Vice President, Grants, Gifts and Compliance, Silicon Valley Community Foundation

This session will focus on effectively communicating complex concepts to various stakeholders in order to streamline grantmaking practices, ensure compliance, and promote understanding and engagement. As a community foundation, we are uniquely positioned to work with audiences who have a variety of needs and different levels of investment in the process, including donor advised fund holders, corporate donors and their employees, domestic and international grantees, program officers and the executive team. In order to facilitate effective grantmaking, grants managers must often educate stakeholders on grant compliance, roles and responsibilities of participants in the process, and grantmaking practices and procedures.

Attendees will be presented with tools and techniques for making complex compliance concepts accessible to various audiences, empowering colleagues to be grants management ambassadors, and deepening grantees’ understanding of the due diligence process.

Examples of successes and challenges will be reviewed, and the session will include a discussion of the risks and benefits of certain stakeholders’ level of involvement in the process. Specific examples may include: the participation of third parties, such as the employees of corporate donors, in the international vetting process to breakdown language barriers and promote cultural awareness; working with colleagues to craft messages for fund advisors and donors about grant compliance; and communicating with the executive team about the value of your processes and approach to grants management.

Belief Alignment for High-Performing Teams

LEARNING TRACK: EFFECTIVE PRACTICES
LEVEL: INTERMEDIATE
ROOM: SILVER LAKE

Damon James, International Grants Administration Officer, Silicon Valley Community Foundation
Christine Morrisette, Director, Grants Administration, Silicon Valley Community Foundation
D. Lea Rauscher, Vice President, Grants, Gifts and Compliance, Silicon Valley Community Foundation

Why is it that some projects and people are easy and satisfying to work with and others are not? Even when our small team is focused on “doing good,” what is it that makes certain efforts succeed and others struggle, sputter or bomb out? Why do some of our best laid plans never come to fruition? If team members have expectations that are out of alignment with the shared goals of the team, the odds of success go down significantly. The limiting beliefs that we hold about ourselves and each other, and the goals we seek to achieve, are often unconscious and play out in ways that keep us and the team we are part of from our full potential. When our expectations of ourselves and the rest of the team are aligned with our shared goals, things happen easily and quickly and generate new ideas and energy in everyone involved.

Participants will learn how to bridge the alignment gaps among teams.

Beyond Direct Grants: Legal Structures for Philanthropic Funding

LEARNING TRACK: COMPLIANCE • EFFECTIVE PRACTICES
LEVEL: ADVANCED
ROOM: STUDIO D

Sasha Abrams, General Counsel and Secretary, Gordon and Betty Moore Foundation
Cathy Manovi, Grants Officer, Gordon and Betty Moore Foundation

This session addresses legal options for funding charitable projects and appropriate structures to optimize charitable work. Discussion will include direct grants, re-granting structures, fiscal sponsorship and fiscal agency, contracts, and program-related investments.

Participants will:

- Learn grant structures and funding vehicles for achieving large-scale, multiparty outcomes
- Recognize when a direct grant, joint venture, collaboration, fiscal sponsorship, or fiscal agency makes sense
- Learn how private foundations strengthen programmatic work with direct charitable activities
- Discover how program-related investments fill the gap to support socially valuable work, and why foundations use them and related operational practices

Case Study in Implementing a New System

LEARNING TRACK: HOT TOPICS • SKILL BUILDING • TECHNOLOGY
LEVEL: INTERMEDIATE
ROOM: WHITLEY HEIGHTS

Allison Gister, Grants & Knowledge Management, Conrad N. Hilton Foundation
Rebecca Smith, Senior Consultant, 1892 consulting

Is something changing…in your foundation? Who you gonna call…Change Busters!

Whether you are thinking of new technology, new processes, or even new staff, join the Change Busters for a case study on how one foundation
Leading from the Middle: From Grants Management to Knowledge Creation

**LEARNING TRACK:** EFFECTIVE PRACTICES  
**LEVEL:** GENERAL  
**ROOM:** MT. OLYMPUS  
**#GMN2017 #GrantsManagers**

Janet Camarena, Director, Transparency Initiatives, Foundation Center  
Rachel Kimber, Grants Manager, Arcus Foundation  
Bonnie Rivers, Associate Director of Grants and Records Management, Carnegie Corporation of New York  
Jason Schumacher, Social Impact Program Manager, Tableau Foundation

Despite widespread recognition from foundations that sharing lessons learned about is vital to the sector’s effectiveness, such sharing is still far from being the norm. Many of the sector’s hard-earned lessons are captured by foundations in the evaluations they fund, commission, require from grantees, and produce themselves. But our collective failure to systematically and openly share these lessons as part of the larger grantmaking process has resulted in the current state of spotty access and fragmented transparency. Grants managers are often in the position of collecting evaluations and reports as part of their role, and some are experimenting with new tools and processes to better scale the sector’s knowledge. Attend this session to become inspired by colleagues who have successfully shifted their role from data processors to knowledge brokers and creators.

**Participants will:**  
- Learn about open knowledge principles  
- Become informed about emerging experimentation in creating a culture of evaluation, learning, and sharing among peer foundations  
- Become familiar with different technologies that can promote greater sector openness  
- Get recommendations for how grants managers can play an important role in scaling the sector’s knowledge

Lessons Learned—The Challenge of a Healthier Louisiana: Tackling Obesity through Collective Impact Grantmaking and What We Learned Along the Way

**LEARNING TRACK:** EFFECTIVE PRACTICES  
**HOT TOPICS:** OUTCOMES/EVALUATIONS  
**LEVEL:** GENERAL  
**ROOM:** ECHO PARK  
**#GMN2017 #collectiveimpact**

Michael Tipton, President, The Blue Cross and Blue Shield of Louisiana Foundation

After concluding a 3-year, $27 million collective impact grant program with more than 300 partners, the Blue Cross and Blue Shield of Louisiana Foundation has a lot of information to share about their findings. Take an in-depth look at the Challenge for a Healthier Louisiana grantmaking framework and find out what worked, what didn’t, and the long-term impact. Through Challenge for a Healthier Louisiana, the Foundation built nonprofit and community capacity, distributed half a million pounds of produce, created miles of new walking paths, enabled thousands to eat in more healthy ways, and achieved results that have laid new paths for community wellness in Louisiana.

**Participants will:**  
- Learn the thought process and design of the Challenge for a Healthier Louisiana and how other funders could create similar collective impact approaches  
- Understand what worked and what didn’t in our collective impact experience so that others can learn from it  
- Learn how we are adapting to have more impact going forward as a model for others to use in their own settings
Hot Topics in International Grantmaking and the SDGs

LEARNING TRACK: HOT TOPICS
LEVEL: GENERAL
ROOM: LAUREL

@CAFAmerica @SDGoals

Ted Hart, ACFRE, CAP®, CEO, CAF America

Jessie Krafft, Senior Director of Donor Advised and Grant Services, CAF America

Join us as we review the impact of the Sustainable Development Goals on international grantmaking as they enter their second year of implementation. This session will address important questions such as: How have the SDGs affected regulatory environments for global giving in foreign countries? How have they affected the environment for risk in those countries? Most importantly, how have the SDGs affected the regulatory environments for global giving in foreign countries? How have they affected the environment for risk in those countries? Most importantly, how have the SDGs affected the regulatory environments for global giving in foreign countries? How have they affected the environment for risk in those countries? Most importantly, how have the SDGs affected the regulatory environments for global giving in foreign countries? How have they affected the environment for risk in those countries? Most importantly, how have the SDGs affected the regulatory environments for global giving in foreign countries? How have they affected the environment for risk in those countries? Most importantly, how have the SDGs affected the regulatory environments for global giving in foreign countries?

Learning Objectives

- Gain a shared understanding of the three Rs of international grantmaking: regulation compliance, risk mitigation, and reputation protection
- Learn the three key trends in SDG implementation: National Development Plans, data collection for SDG implementation, partnerships for the goals
- Understand some important current issues in country-specific legal contexts that affect international philanthropy from the United States

Owning the Room—At Ease in the Spotlight: A Focus on Nonverbal Communication

LEARNING TRACK: SKILL BUILDING
LEVEL: GENERAL
ROOM: FRANKLIN HILLS

#GMN2017 #nonverbalcomms

LaShonda Barnett, Grants & Research Manager, Dallas Women’s Foundation
Katrin Blucker Ludwig, Community Grants Manager, Methodist Healthcare Ministries of South Texas

Actors do it all the time—use body language to own the room and exude confidence. In a one-on-one or a group meeting, how we enter the room, stand, sit, and speak has an unconscious effect on those around us as well as ourselves. This session will present scientific studies and provide simple modifications each of us can make in our body language to demonstrate confidence. Participants’ activity will include emulating some of these behaviors including “taking the stage.”

Participants will:
- Learn and identify nonverbal signals
- Achieve power posing for confidence
- Practice nonverbal skills (handshake, entering a room, power pose, etc.)

Spotting the Missing Tech in Grant Proposals

LEARNING TRACK: EFFECTIVE PRACTICES • HOT TOPICS
LEVEL: GENERAL
ROOM: LOS FELIZ

#GMN2017 #techreqs

Karen Graham, Executive Director, Idealware

You’ve evaluated plenty of grant proposals and you totally know what you’re doing… except when it comes to technology. You’re not a tech expert – so how can you assess whether technology requirements are adequately covered in a proposal? Have applicants budgeted enough for technology? Do they have the capacity to manage the technology aspects of a project? Without the right technology infrastructure and support, many projects are doomed to fail. Through a combination of formal presentation and break-out discussions, in this session you will learn which aspects of technology often get overlooked, questions to ask in the application process that help you and your applicants think through technology needs, and ways to support your grantees’ technology success.

Participants will:
- Learn which aspects of technology most often get overlooked and under-funded
- With peers, develop ideas for how your grant application, review, and feedback processes can help address this problem
- Consider new ways to support grantees’ technology success

PARTNER SPONSORED SESSION

Foundant User Group

LEARNING TRACK: PARTNER SPONSORED SESSION • TECHNOLOGY
LEVEL: GENERAL
ROOM: NICHOLS

#GMN2017 #foundantusers @Foundant

Sammie Holzwarth, Product Implementation Manager, Foundant
Daren Nordhagen, President, Foundant

Whether you are a current user of Foundant Grant Lifecycle Manager (GLM) or are interested in learning more about our online grants management solution, we invite you to attend this session.

Participants will:
- Get a walk-through of the most recent GLM release information
- Have a chance to ask questions about GLM and Foundant

Those who are not yet users of GLM will get a chance to see how Foundant interacts with our clients and hear directly from our users about how they use the system.
The 8 Habits of Highly Effective Grant Managers

LEARNING TRACK: EFFECTIVE PRACTICES • SKILL BUILDING
LEVEL: GENERAL
ROOM: MT. OLYMPUS

Nichole Hoeflich, Program Specialist, Grantmakers for Effective Organizations

Building off the GMN2016 short talk on “The Seven Habits of Highly Effective Grant Managers,” Grantmakers for Effective Organizations will dive deeper into how to put these habits into practice before exploring an 8th habit: dancing on the edge. This session will discuss how all eight habits pave the way for grant managers to become better problem solvers and use their voices to engage their colleagues in overcoming challenges.

Participants will:
• Acquire knowledge of eight habits that will help grant managers become better problem solvers and relationship builders
• Gain ideas for small steps grants managers can take to put these habits into practice in their day-to-day work
• Feel empowered to exercise leadership in their role as grant managers

Evaluation: Creating a Way to Measure Impact

LEARNING TRACK: HOT TOPICS • OUTCOMES/EVALUATION • TECHNOLOGY
LEVEL: ADVANCED
ROOM: WHITLEY HEIGHTS

Grantmakers continue to struggle with how to approach evaluation and create a path toward greater impact measurement. This session will present a case study of how some grantmakers are working to operationalize their evaluation function using the new Impact Intelligence module of the Fluxx system, currently in a pilot phase. The session will cover not just the value of using a technology tool that connects to the existing grants database, but also the importance of using an evaluation framework that works for grantors and grantees.

We will discuss the considerations that went into configuring the online tool, data collection needs, and data dissemination implications from analyzing the information collected.

Participants will deepen their understanding of how to make evaluation systems a reality.

From Data to Dashboard

LEARNING TRACK: DATA INTELLIGENCE • SKILL BUILDING • TECHNOLOGY
LEVEL: INTERMEDIATE
ROOM: ECHO PARK

Katherine Murphy, Senior Data & Database Analyst, Kaiser Permanente

You know your grant data is robust, but do you want to shine the spotlight on your team’s work? Learn to highlight your data using dashboards to capture the eye of leadership and colleagues. Using real grant data, we will discuss potential stories to tell, which details to use for the best stories, and how to pick and design your dashboard.

This session will provide you with resources, tips, and tricks to help you when you return to your office.

No design experience is recommended. However, basic Excel and pivot table knowledge is recommended.

Participants will:
• Learn a simple way to create a dynamic dashboard
• Understand dos and don’ts of dashboard visualization
• Learn some of the best dashboard resources

From Piles to Smiles—Making Reporting Work

LEARNING TRACK: EFFECTIVE PRACTICES
LEVEL: GENERAL
ROOM: STUDIO D

Jessica Bearman, Principal, Bearman Consulting

Let’s talk about reporting requirements. Almost every grantmaker requires reports from grantees, but we often do very little with the information we receive. Whether reports are used for simple accountability purposes, to have good stories for the board, to build a relationship with the grantee, to make future funding or strategy decisions, or to build a field, the questions we ask should be purposeful—and the information should be used.

GMN’s Project Streamline is conducting an exploration of reporting practice across the field. Come and hear what we’re learning and discuss ideas for making reporting more streamlined and meaningful for you and your grantees.

Grantmaking: Investing in Change

LEARNING TRACK: EFFECTIVE PRACTICES • HOT TOPICS • OUTCOMES/EVALUATION • SKILL BUILDING
LEVEL: GENERAL
ROOM: STUDIO E

Ayorinde M’cleod, Grants Manager, The Leona M. and Harry B. Helmsley Charitable Trust
Chad Martin, Development & Exempt Organizations Practice, KPMG LLP

Grantmakers continue to look for innovative ways to leverage the value of their charitable resources. Charitable or impact investing are trending concepts, but how can these trends benefit your organization and your charitable programs in efficient and impactful ways. Participants will have the opportunity to discuss ways to drive their charitable mission(s) through strategic charitable grants and investments, including getting acquainted with charitable investments and strategies; evaluating the benefits of investing in grantmaking; judging key governance and operational considerations; looking at types of charitable investments; measuring impact (inputs, outputs, outcomes, and impact);
and assessing special considerations for international Investments.

Participants will:
- Gain familiarity with the landscape of impact investing
- Understand both key risks and key opportunities in impact investing
- Learn ways to enhance impact of grants

Grantmaking Toolkit: Intermediary Partners

LEARNING TRACK: EFFECTIVE PRACTICES
LEVEL: GENERAL
ROOM: FRANKLIN HILLS
#GMN2017 #GMintermediaries

Nancy Herzog, Senior Director, Grants Administration, National Endowment for Democracy
Amanda Keton, General Counsel, Tides Foundation
Rachel Kimber, Grants Manager, Arcus Foundation
Magui Rubalcava Shulman, President/Founder, Borealis Philanthropy

Has your organization considered working with intermediaries? Do you already participate in intermediary grantmaking but are unclear of the costs and benefits of this relationship? Intermediaries can be strategic partners by supporting funders as thought partners, issue experts with technical acumen, and nimble implementers of bold strategy.

In this session, you will engage with a panel of funders and intermediaries who will explore the role intermediaries play in strategic grantmaking. Grants managers can support transformational change by incorporating the expertise, capacity, and legal bandwidth of intermediaries as part of their strategic toolkit. Together, the panel and audience will explore obstacles and methodologies and arrive at good grantmaking solutions.

Intermediary grantmaking can play a critical role in extending and enhancing philanthropic impact. Come find out how!

Improvised Comedy for Grants Managers (Seriously!)

LEARNING TRACK: SKILL BUILDING
LEVEL: GENERAL
ROOM: LOS FELIZ
#GMN2017 #GMimprov

Jen Bokoff, Director of Knowledge Services, Foundation Center
Gretchen Schackel, Grants Manager, James F. and Marion L. Miller Foundation

Back by popular demand! Come ready to let loose and laugh! In this session, you’ll learn some improv comedy basics that might be the most valuable skills you take back to the office. Listening, the “yes, and” approach, teamwork, creativity, and thinking on your feet are all at the heart of comedy, and also your jobs. Gretchen and Jen are both trained in comedy and have worked in philanthropy long enough to have fun with it. If you want to do everything but sit in your seat and take notes, this session is for you!

Participants will:
- Learn about the “yes, and” approach and find value in integrating it into your daily interactions
- Explore good listening and thinking on your feet.
- See how humor can be a valuable tool to advance your personal and organizational goals

NOTE: Session is limited to 36 participants to make this a truly unique and personal learning experience.

Is Being a Consultant the Next Move in Your Career?

LEARNING TRACK: SKILL BUILDING
LEVEL: GENERAL
ROOM: SILVER LAKE
#GMN2017 #GMconsulting

Lourdes Inga, Philanthropy and Grantmaking Practice Consultant
Danette Peters, CEO, Onyx Consulting LLC
Rebecca Smith, Senior Consultant, 1892 consulting
Ursula Stewart, Senior Grants Associate and System Administrator, New York State Health Foundation

They ask the question, “Have you ever considered consulting?” What do you say?

This session is designed to provoke discussion and exploration of consulting as a career path option, a side job, a pro bono position, or a full-time gig. Panelists will share a bird’s eye view of suggestions to help you make a decision, how to get started, and lessons learned from first-time consulting experiences.

Participants will:
- Discover the value of your grants management knowledge
- Study consulting option is the right fit for them
- Become aware of necessary, applicable contractual obligations

PARTNER SPONSORED SESSION
roundCorner: Women in Philanthropy: Bridging the Technology Gap

LEARNING TRACK: HOT TOPICS • PARTNER SPONSORED SESSION • TECHNOLOGY
LEVEL: GENERAL
ROOM: NICHOLS
#GMN2017 #womenwhotech
roundCornerinc

Julia Cannon, Senior Product Manager, foundationConnect, roundCorner
Jessica Hickok, Grants Manager and GMN2017 Annual Conference Co-chair, The James Irvine Foundation
Andrea Landes, Vice President, Grants Management, The Commonwealth Fund
Ify Mora, Director of Operations, Barr Foundation
Padma Sathyamoorthy, Technology Director, The Skoll Foundation

With women making up the majority of nonprofit staff, they possess a unique ability to act as change makers in their communities. As foundations realize the importance of staying abreast of the advancing world of technology, women in philanthropy can harness this skill to change the way their organizations operate. Join our all-female panel as they talk about how they embraced new technology while facing challenges and leveraging the advantages of being a female technologist in the philanthropic world, regardless of job description or experience.
**Collaborating Smarter: Human-Centered Design Thinking**

**LEARNING TRACK:** EFFECTIVE PRACTICES  
**LEVEL:** INTERMEDIATE  
**ROOM:** LOS FELIZ  
**#GMN2017 #humandesign #smartcollab**

**Jen Bokoff,** Director of Knowledge Services,  
**Foundation Center**  
**Amanda Dillon,** Knowledge Services Manager,  
**Foundation Center**

This session will explore how to approach problems and their potential solutions through a thoughtful process. Participants will learn how using human-centered design thinking allows for focus on action, support systems, and processes for innovation, as well as learn to use design thinking in a variety of settings. Participants in this interactive session will focus on strengthening collaboration with colleagues, peers, grantees, and other stakeholders using design thinking.

**Participants will:**
- Process information about collaboration using the Rose-Thorn-Bud Technique
- Participate in a rapid idea generation exercise that can replace traditional brainstorming
- Learn how a concept poster can be an important tool in a participatory process

**Getting Upstream: How Grants Management Can Grow Its Influence**

**LEARNING TRACK:** EFFECTIVE PRACTICES  
**LEVEL:** INTERMEDIATE  
**ROOM:** MT. OLYMPUS  
**#GMN2017 #GMupstream**

**Jessica Bearman,** Principal, Bearman Consulting  
**Marcus McGrew,** Director of Program Operations and Information Management,  
**The Kresge Foundation**

The work of grants management professionals has become increasingly vital as funders seek to grow the impact of philanthropic investments, increase transparency, and ensure that internal processes are efficient and effective. Grants managers are embracing new roles as process specialists, data analysts, relationship experts, troubleshooters, and quality control officers. Many serve on the front lines of organizational learning and strategy. While some of this shift reflects technological advances or goes along with broad organizational changes precipitated by the CEO, grants management can also catalyze changes and take advantage of inflection points to gain more influence. In this session, we’ll discuss promising structures and behaviors, and explore the expanded role for grants management in your own setting.

**Participants will:**
- Learn why building relationships with grantees improve foundation effectiveness
- Understand how to translate values into practice as program officers and grants managers
- Explore challenges to building relationships with grantees and tactics to overcome those challenges

**Linking Values to Practice: Developing an Effective Working Relationship with Your Grantees**

**LEARNING TRACK:** EFFECTIVE PRACTICES  
**LEVEL:** GENERAL  
**ROOM:** WHITLEY HEIGHTS  
**#GMN2017 #linkingvalues**

**Kevin Bolduc,** Vice President, Assessment and Advisory Services,  
**The Center for Effective Philanthropy**  
**Lavastian Glenn,** Program Director,  
**Mary Reynolds Babcock Foundation**

Foundations promote values such as trust, transparency, and accountability. Yet restrictive funding, elusive decision-making, and overbearing reporting requirements tell a different story. In many cases, values and practices are disconnected. This session will explore the connection between foundation values and your organizational practices that engage grantee partners. We will explore why relationships matter and how they can impact foundation effectiveness. Research findings from the Center for Effective Philanthropy’s Working Well with Grantees report will be shared.

**Participants will:**
- Learn how building relationships with grantees improve foundation effectiveness
- Understand how to translate values into practice as program officers and grants managers
- Explore challenges to building relationships with grantees and tactics to overcome those challenges

**No Longer Arbitrary: Using Data to Drive Policy Decisions**

**LEARNING TRACK:** DATA INTELLIGENCE  
**LEVEL:** GENERAL  
**ROOM:** SILVER LAKE  
**#GMN2017 #GMdatapolicy**

**Jonathan Goldberg,** Director of Learning and Grant Operations,  
**Sorhn Foundation**  
**Suki O’Kane,** Director of Administration,  
**Walter and Elise Haas Fund**

Many foundations are beginning to use grantmaking (and other) data to drive their internal policy decisions. Grants managers are at the forefront of collecting, interpreting, and presenting such data to help generate buy-in for changes at the staff and/or board levels. This is to ensure that all policies are backed by data rather than inertia or arbitrary decisions. Examples can include changes to delegated grant approval/amounts, letter of inquiry processes, demographic data collection, and more.

**Participants will:**
- Learn how to fully examine how foundations selected their data
- Learn how organizations filter and present their data
- Understand how data helps support foundation-wide learning
- Become empowered to be a key partner in strategic planning
**Packing Up and Moving On(line): How to Select and Successfully Implement the Right System for Your Grantmaking Organization**

**SESSION DESCRIPTION**

*learning track: compliance • data intelligence • effective practices • hot topics • skill building • technology*

**level: general**

**room: solano**

#GMN2017 #GMonline

**Martin Schneiderman, CEO, Information Age Associates**

More foundations report that they are migrating their information systems than ever before. Systems integration and moving to the cloud is now enabling grantmakers to streamline their operations, conduct due diligence, link securely to internal and external systems, see trends, and present information graphically to facilitate decision-making. But for many, it also represents a major challenge. In this session, we’ll give real world examples of some of the best ways to gather information, make these important decisions, and manage such complex projects. We’ll also identify key features and limitations of new systems, including lessons that grantmakers and IT staff have learned along the way.

**Participants will**:
- Learn the most important things to carefully consider for well-informed selection and implementation of your foundation’s next generation grants management system
- Learn the most commonly reported problems that foundations encounter when migrating data and configuring a new integrated foundation information system
- Discover effective strategies to prevent and mitigate system migration and configuration problems

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**Pennies for Progress: A Decade of Boom for Philanthropy, A Bust for Social Justice**

**SESSION DESCRIPTION**

*learning track: effective practices • hot topics*

**level: general**

**room: studio d**

#GMN2017 #philanthropy #socialjustice

**Ryan Schlegel, Senior Research and Policy Associate, National Committee for Responsive Philanthropy**

**Roxana Tyman, Executive Director, LAANE**

**Hanh Cao Yu, Chief Learning Officer, The California Endowment**

Which funders are leading the pack in giving to empower movements for social justice? Have the last 10 years seen any change in foundation giving as general support? How do corporate foundations measure up to their independent and community peers? These questions and more will be answered in this session on the most recent edition of the National Committee for Responsive Philanthropy’s (NCRP) popular series of reports, The Philanthropic Landscape. The retrospective includes an analysis of 10 years’ worth of new data from the Foundation Center on giving for social justice and underserved communities from 2003-2013. Presenters will illuminate the trends and impact of funding for advocacy, organizing, and civic engagement, as well as share reactions to the insights into their systems change work and positive outcomes from the past decade.

**Participants will**:
- Understand trends on funding for social justice and underserved communities originating from independent, corporate, and community foundations
- Hear examples of foundation best practices in giving for social justice and underserved communities in light of these data
- Understand the importance of advocacy, organizing, and civic engagement for nonprofit partners in light of the current policy environment

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**Red Flags—Donor Advised Funds Grantmaking**

**SESSION DESCRIPTION**

*learning track: compliance • effective practices • hot topics • skill building*

**level: intermediate**

**room: studio e**

#GMN2017 #DAFgrantmaking

**Eric Anderson, Director of Stewardship, Minneapolis Community Foundation**

**Liza Loganoff, Director of Grants Budgeting & Management, Community Foundation for Southern Arizona**

**Maggie Murphy, Grants Manager, The New York Community Trust**

**Leslie Snyder, Grants and Gifts Administrator, Community Foundation for Southern Arizona**

Why do grants managers matter? With increasing scrutiny on the field from the media, lawmakers, and savvy donors, grants managers not only have to keep donors happy but also keep abreast of changing rules. The New York Community Trust has more than 80 years of experience with donor advised grantmaking to share. Session topics will include minimum payout requirements, pledges and personal liability, grants to attend parties, giving checks to donors to give out, split gifts, grants to individuals (scholarships, fellowships, and prizes), and grants to supporting organizations.

**Participants will**:
- Learn how to say no while also maintaining good relationships with donors
- Discover the value added for donors from an in-depth due diligence process
- Learn the important role grants managers play in the grantmaking process
- Participate in an open discussion of how to responsibly manage donor advised funds in a changing landscape

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**The Role of Grants Managers in Putting Culture into Practice**

**SESSION DESCRIPTION**

*learning track: effective practices • hot topics • skill building*

**level: general**

**room: echo park**

#GMN2017 #GMculture

**Nichole Hoeflich, Program Specialist, Grantmakers for Effective Organizations**

**Ify Mora, Director of Operations, Barr Foundation**

**Amy Shields, Program Manager, Grantmakers for Effective Organizations**

A productive foundation culture supports nonprofit success and requires intentionality and constant tending. Though everyone
Working Together: Effective Funder Collaboration in Disaster Grantmaking

**LEARNING TRACK:** EFFECTIVE PRACTICES
**LEVEL:** GENERAL
**ROOM:** FRANKLIN HILLS

Participants will:
- Gain an understanding of how a productive foundation culture can support better results for grantmakers and nonprofits alike
- Learn about key moments when grants managers have an opportunity to proactively shape organizational culture in a positive way
- Hear from peers about specific ways grants managers have influenced their organization’s culture

PARTNER SPONSORED SESSION

WizeHive: Overcoming Software Overload: A Glimpse into the Future of Grantmaking

**LEARNING TRACK:** PARTNER SPONSORED SESSION • TECHNOLOGY
**LEVEL:** INTERMEDIATE
**ROOM:** NICHOLS

Participants will:
- Be briefed on the results of a survey revealing the most popular software solutions used across many foundations
- Learn about present-day tools and strategies you can use to better integrate and customize that software to work for you
- Explore key insights on the future of grantmaking software

WizeHive: Overcoming Software Overload: A Glimpse into the Future of Grantmaking

Anthony Putilynano, CTO, WizeHive
Natalie Hirsch, Director of Product Management, WizeHive

NGOsource: Share the Work. Reap the Benefits. The Centralized ED Repository

**LEARNING TRACK:** PARTNER SPONSORED SESSION • TECHNOLOGY
**LEVEL:** GENERAL
**ROOM:** NICHOLS

Participants will:
- Discuss some new NGOsource initiatives and priorities to benefit managers and for grantees
- Learn tips on how to successfully collaborate with other funders throughout the disaster lifecycle
- Gain insights from recent successful disaster-related collaborations
- Learn information on the latest national disaster philanthropy resources available

Natalie Hirsch, Director of Knowledge Services, Council on Foundations
Anna Hurt, Disaster Management Analyst, Center for Disaster Philanthropy
Michael Tipton, President, The Blue Cross and Blue Shield of Louisiana Foundation

When a disaster strikes, funders are often eager step forward to assist in community recovery efforts. A clear model for convening and collaborating in all phases of the disaster lifecycle is vital. Through a national partnership, the Council on Foundations and the Center for Disaster Philanthropy will offer lessons learned and practical tools to maximize funder collaboration for effective disaster grantmaking. Participants will also get to hear about a successful funder collaboration.

Partners will:
- Gain an understanding of how a productive foundation culture can support better results for grantmakers and nonprofits alike
- Learn about key moments when grants managers have an opportunity to proactively shape organizational culture in a positive way
- Hear from peers about specific ways grants managers have influenced their organization’s culture

We envision a near future with far fewer compromises—one where modern software systems can communicate with each other, integrate in new and exciting ways, and provide customization capabilities that work for you, not against you.

NGOsource revolutionizes how EDs can serve not only individual foundations but the sector as a whole. In the four years since launch, NGOsource has conducted more than 2400 EDs for over 180 grantmakers. As the repository grows, members benefit by gaining access to other members’ EDs through a streamlined, efficient process. The result: more funds directly supporting nonprofits in 115 countries on behalf of over 180 grantmakers. As the repository grows, members benefit by gaining access to other members’ EDs through a streamlined, efficient process. The result: more funds directly supporting nonprofits across the globe.

Partners will:
- Learn how your peers are using NGOsource to make international grantmaking simpler both for grants managers and for grantees
- Discuss some new NGOsource initiatives and priorities to benefit the sector
The Good, Bad, and the Ugly: What Story Does Your 990 Tell About Your Foundation?

Learning Track: Short Talks
Room: Studio E
#GMN2017 #990PF
Janet Camarena, Director, Transparency Initiatives, Foundation Center

Have you read your institution’s 990 lately? The IRS recently started releasing e-filed Forms 990 and 990-PF as machine-readable, open data. Because the data is now not only open, but digital and machine-readable, this means that anyone from journalists to researchers to activists can aggregate this data and make comparisons, correlations, and judgments about philanthropy at lightning speed, all without your input. This has implications for foundations institution-wide, from grants data to staffing to investment management. Attend this session to learn about sections of the Form 990 that present potential risks and vulnerabilities, as well as opportunities to better explain your institution’s work.

Incorporating DEI in Grantmaking: From Theory to Practice

Learning Track: Short Talks
Room: Whitley Heights
#GMN2017 #DEI #grantmaking
Kelly Brown, Director, D5 Coalition
Nancy Chan, Director, Consulting Services, Arabella Advisors

In the endeavor to make their grantmaking effective, many philanthropists have adopted practices that may actually undermine their missions. In other cases, there may be blindspots resulting from implicit bias in their grantmaking, which can detract from funders’ missions. Whether intentional or not, the end result is the philanthropy at large has not been as diverse, inclusive, or equitable, as it strives to be in its rhetoric. Through their work they have distilled some promising practices to incorporate DEI in grantmaking, from resources available through D5 Coalition and other organizations. Through this interactive short talk, presenters will share these practices and provide ideas on how to practically engage DEI participants’ own work.

The Lifecycle of Your Grant Data

Learning Track: Short Talks
Room: Mt. Olympus
#GMN2017 #foundationcenter #datasharing @fdncenter
C. Davis Parchment, Manager, Electronic Reporting Program, Foundation Center

Ever wondered what happens to your grant data when you share it with Foundation Center, which in turn shares it with the rest of the world? Come to this short talk to see how the data is structured, shared and impacts conversations all over the world among people trying to make a difference. Walk away with a better understanding of how to organize your grants data for public consumption.

One Foundation’s Journey into Developing an Impact Assessment Framework

Learning Track: Short Talks
Room: Los Feliz
#GMN2017 #impactassessment
Angela Carr, Grants Management Associate, Weingart Foundation
Joyce Ybarra, Director of Learning, Weingart Foundation

Learning and assessment has been top-of-mind for many foundations. Trying to answer the question “What is the impact of our grantmaking?” is particularly challenging for a funder that provides much-needed general operating support (GOS) to organizations that serve a diverse range of populations in a wide variety of sectors. This short talk will examine one foundation’s process of developing an assessment system designed to generate meaningful information about the impact of its GOS funding on grantee organizational effectiveness, including lessons learned and the road ahead.

Owning Our Power at Work

Learning Track: Short Talks
Room: Silver Lake
#GMN2017 #owningyourpower
Danette Peters, CEO, Onyx Consulting LLC
Wendy Watson-Hallowell, The Belief Coach, BeliefWorks

What is a healthy relationship to our “power” and what keeps us from acting in a fully empowered way? Who are the people that we give our power away to and how can we change our response to situations that keep us from asking for what we want or saying no to what we don’t want? This session focuses on the beliefs and behaviors that keep us from being our unique, authentic, and expressive selves at work. Whether you are an extrovert, or an introvert, an intern or the board chair, this session can help you to take your power back and offer your greatest contribution yet.
PENNIES FOR PROGRESS: A DECADE OF BOOM FOR PHILANTHROPY, A BUST FOR SOCIAL JUSTICE
LEARNING TRACK: SHORT TALKS
ROOM: STUDIO D

Ryan Schlegel, Senior Research and Policy Associate, National Committee for Responsive Philanthropy
Roxana Tynan, Executive Director, LAANE
Hanh Cao Yu, Chief Learning Officer, The California Endowment

Which funders are leading the pack in giving to empower movements for social justice? Have the last 10 years seen any change in foundation giving as general support? How do corporate foundations measure up to their independent and community peers? These questions and more will be answered in this session on the most recent edition of the National Committee for Responsive Philanthropy’s (NCRP) popular series of reports, The Philanthropic Landscape. The retrospective includes an analysis of 10 years’ worth of new data from the Foundation Center on giving for social justice and underserved communities from 2003-2013. Presenters will illuminate the trends and impact of funding for advocacy, organizing, and civic engagement, as well as share reactions to the insights into their systems change work and positive outcomes from the past decade.

UN SUSTAINABLE DEVELOPMENT GOALS: UNDERSTANDING THE ROLE
LEARNING TRACK: SHORT TALKS
ROOM: FRANKLIN HILLS

Annie Rhodes, Director, Foundation Strategy, MicroEdge + Blackbaud
Amanda Dillon, Knowledge Services Manager, Foundation Center

While you’re hard at work advancing your mission, it can be easy to think of your program’s results as the entire story, but what if your work were intrinsically connected to a wider effort with even broader impact? Recently, the United Nations mapped out its 2030 Agenda for Sustainable Development to transform our world for the better, with various goals and targets that seek to make a major global impact. Even if your programs are domestically based, in all likelihood they are contributing to this extraordinary global effort of ending extreme poverty, fighting inequality and injustice, and fixing climate change. Join this short talk to learn how you and the organizations you are funding and supporting are already contributing to the 2030 Agenda and what you can do today to increase the global impact of your work.

UN-RESTRICT SUPPORT! AN INNOVATIVE APPROACH TO FUNDING
LEARNING TRACK: SHORT TALKS
ROOM: ECHO PARK

Anwar Juraidini, Grants Manager, Citi Foundation
Sarita Michaco, Grants Associate, Citi Foundation

Are you rethinking your grants management approach from project-specific funding to unrestricted support? Using the case study of the Citi Foundation’s Community Progress Makers program, which is a $20 million initiative to support 40 high-impact community organizations, we will dive into the trending topic of combating the nonprofit starvation cycle with general operating support.

This session will equip grantmakers to build the infrastructure needed to invest in your partners, not just their projects.

YOUTH GIVING IS A PHILANTHROPIC FORCE
LEARNING TRACK: SHORT TALKS
ROOM: SOLANO

Amanda Dillon, Knowledge Services Manager, Foundation Center

Young people worldwide are transforming their communities and themselves by making grants—more than $14 million worth since 2001—to causes they’re passionate about. In this session, participants will get a summary on what the data shows about youth grantmaking, then hear a conversation about two youth grantmaking programs that reveal the ins and outs of their work. Grants managers will learn practical tips and ideas on how to integrate this form of participatory grantmaking.

PARTNER SPONSORED SESSION
Fluxx: Igniting Your Mission in 2017
LEARNING TRACK: DATA INTELLIGENCE • TECHNOLOGY
LEVEL: GENERAL
ROOM: NICHOLS

Kerrin Mitchell, Founder & Chief Relationship Officer, Fluxx
Kristy Gannon, Chief Product Officer, Fluxx

Never before have foundations invested so deeply in the future of our world. In fact, over the next two years the growth of foundation giving is projected to increase more rapidly than it has in the last 25 years. Clearly, grantmakers have never played a more important role in society. Yet inefficiencies remain in how grantmaking gets done. Grantees are still the bearers of unnecessary burden and many times important grantmaking data is locked away, inaccessible to program staff or the executive team. It doesn’t have to be this way.

Participants will:
• Learn how to improve the operational efficiency of all processes, simple or complex, even on the go
• Gain heightened accessibility to critical insights
• Empower the entire team to make data-driven decisions
**Assessing Nonprofit Financial Health**

**LEARNING TRACK:** EFFECTIVE PRACTICES  
**LEVEL:** INTERMEDIATE  
**ROOM:** MT. OLYMPUS  
**#GMN2017 #nonprofitfinance**

Hilda Polanco, Founder and CEO, Fiscal Management Associates (FMA)

In order to make sound funding decisions, grantmakers must have a firm grasp of the story told by the numbers. Nonprofit organizations face increasing financial challenges in today's operating environment, but understanding the financial health of both current and prospective grantees is a critical part of the grantmaking process. Focusing on effective approaches to reading and interpreting financial statements, this session will equip grantmakers to understand their grantees' financial reality by presenting concepts and tools applicable to grantees across a range of mission areas and business models.

**Participants will:**
- Learn the considerations that go into developing a large cross-foundation research initiative
- Find out specific use cases for how landscape research around human rights has been used to inform decision making within foundations
- Get ideas on how knowledge synthesis and sharing across foundations might help their own work

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**Data: The Power Tool for Human Rights Funding**

**LEARNING TRACK:** DATA INTELLIGENCE  
**LEVEL:** GENERAL  
**ROOM:** FRANKLIN HILLS  
**#GMN2017 #humanrightsfunding**

Myriam Fitz-Hawkins, Director, Grantmaking Resource Center, National Endowment for Democracy

Anna Koob, Knowledge Services Manager, Foundation Center

Sara Tansey, Program Manager, Research and Policy, International Human Rights Funds Group

Arlene Wilson-Grant, Grants Manager, Disability Rights Fund

Are you a data champion or a data skeptic? Both are encouraged to attend this session! Foundation Center will provide an overview of its multi-year research effort with the International Human Rights Funds Group that brings together grants data from 803 funders in 46 countries to inform an ambitious slate of research materials—a yearly key findings report, a cross-cutting website, and a mapping tool that allows users to drill down to the individual grants level.

The session will focus on the genesis and evolution of the project, as well as the importance of "research with a purpose," highlighting input from funders that informed the process and emphasizing the value of having a clear set of questions in designing useful research. And, most importantly, we’ll talk about how the key to field-wide research is good data, and how you as grant managers make this possible. We’ll also address challenges related to the effort of synthesizing grants data from a number of funders, because nothing is ever as smooth as it looks.

**Participants will:**
- Find out specific use cases for how knowledge synthesis and sharing across foundations might help their own work
- Get ideas on how knowledge synthesis and sharing across foundations might help their own work

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**Dive In: Disasters and Data**

**LEARNING TRACK:** DATA INTELLIGENCE  
**LEVEL:** GENERAL  
**ROOM:** ECHO PARK  
**#GMN2017 #disasterdata**

Anna Hurt, Disaster Management Analyst, Center for Disaster Philanthropy

Bring your laptops, log in to wi-fi, and spend a session with the Center for Disaster Philanthropy! During this hands-on, humer filled session, the Center for Disaster Philanthropy will walk you through two tools that will give you data, analysis, and concrete action plans to help you navigate confusion surrounding disaster grantmaking—before, during, and after a disaster strikes.

Measuring the State of Disaster Philanthropy 2016 brings together six data sources (foundation, corporate, and individual giving as well as FEMA, OECD-DAC and non-DAC allocations) to provide a robust picture of global disaster giving trends. With narrative to underpin incredibly telling graphics, as well as an interactive map that lets users dive into the data, Measuring the State of Disaster Philanthropy is an incredible resource for grant managers.

The Disaster Philanthropy Playbook is a comprehensive resource of best practices and innovative approaches to guide the philanthropy community in responding to future disasters. It’s centered on 14 strategies, including community and economic recovery, education, health and behavioral health, aging and disabled populations, arts and culture, and environment. During the session, participants will roll up their sleeves and walk through every element of the Playbook (with a guided tutorial, of course!).

We promise that at the close of this session, participants will be data disaster experts—knowledgeable in both navigating and translating disaster data streams as well as knowing where, when, and how to put the Disaster Philanthropy Playbook to good use!

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**How to Make the Move from Administrator to Advisor**

**LEARNING TRACK:** SKILL BUILDING  
**LEVEL:** INTERMEDIATE  
**ROOM:** SOLANO  
**#GMN2017 #movingup**

Kim Armstrong, Community Programs Manager, Mutual of Omaha Foundation

Chris Percopo, Director of Grants Management, The Leona M. and Harry B. Helmsley Charitable Trust

Wendy Watson-Hallowell, The Belief Coach, BeliefWorks

What does it take to move from being seen as an administrator to being seen as a leadership advisor? In this follow up to the GMN2016 session “Moving from the Back Room to the Executive Suite,” we will review the roles, beliefs, and behaviors that hold us back or help us make the move, and then take a dive into two leaders’ successful transitions. This session digs deep into what it takes to make this transition in both mindset and action. It uses real examples and best practices on
How to navigate the journey, and is helpful to both those who want to make the move, and the leaders that support them.

Participants will:

- Discover how to embrace new beliefs and practices that will change how grants management professionals are seen within your organization, the value you bring to the leadership table, and how you see yourself
- Learn how to stop taking orders and start taking charge of how your organization gathers, assesses, and uses data for decision-making that leads to the highest impact
- Identify ways to expand your advisory role by knowing who your “customers” are, what success means to them, and what you can provide to help them succeed

Impact Investing: The Intersection of Money and Meaning

Learning Track: Hot Topics
Level: Intermediate
Room: Studio E

Lisa Richter, Managing Partner, Avivar Capital

Curious about impact investing and want to learn more? This session is an opportunity to learn exactly what impact investing is and how it relates to philanthropy. The growing investment market provides capital to address the world’s most pressing challenges in sectors such as sustainable agriculture, renewable energy, conservation, microfinance, and affordable and accessible basic services including housing, healthcare, and education.

Participants will:

- Learn what is impact investing and the considerable growth of the field
- Understand the fallacy of a financial returns tradeoff
- Find out how to measure social and environmental performance
- Discover how foundations can engage in impact investing

NOTE: Session is limited to 36 participants to make this a truly unique and personal learning experience.

It’s Not You, It’s Me: Breaking Up with Your Organization’s Inequitable Funding Practices

Learning Track: Effective Practices • Hot Topics
Level: Intermediate
Room: Studio D

Erika Grace “E. G.” Nelson, Senior Community Funding Coordinator, Center for Prevention, Blue Cross and Blue Shield of Minnesota

Funders have increasingly emphasized the concept of equity in their philanthropic support. Although these funders are becoming more aware of the role grantmaking plays in dismantling systemic oppression and inequitable outcomes, they may be unaware of how the policies, procedures, and practices guiding their own funding may systemically prevent well-suited organizations from receiving support.

Two separate departments within Blue Cross and Blue Shield of Minnesota Foundation have recently examined how the policies surrounding their community giving can be changed to uplift communities facing the greatest health disparities. The Center for Prevention completed a thorough review to identify areas where policies, procedures, and practices created or reinforced barriers for certain organizations. After revisiting our organizational mission and values around equity and fairness, we identified key areas of our process that did not align.

Improv Comedy for Grants Managers (Seriously!)

Learning Track: Skill Building
Level: General
Room: Los Feliz

Jen Bokoff, Director of Knowledge Services, Foundation Center
Gretchen Schackel, Grants Manager, James F. and Marion L. Miller Foundation

Back by popular demand! Come ready to let loose and laugh! In this session, you’ll learn some improv comedy basics that might be the most valuable skills you take back to the office. Listening, the “yes, and” approach, teamwork, creativity, and thinking on your feet all are at the heart of comedy, and also your jobs. Gretchen and Jen are both trained in comedy and have worked in philanthropy long enough to have fun with it. If you want to do everything but sit in your seat and take notes, this session is for you!

Participants will:

- Learn about the “yes, and” approach and find value in integrating it into your daily interactions
- Explore good listening and thinking on your feet.
- See how humor can be a valuable tool to advance your personal and organizational goals

NOTE: Session is limited to 36 participants to make this a truly unique and personal learning experience.
After many deep conversations about changes that could be made and their potential for more equitable outcomes, the team developed recommendations that are currently being piloted and evaluated. The Blue Cross and Blue Shield of Minnesota Foundation similarly piloted new engagement strategies and eligibility requirements to uplift organizations led by and serving communities of color, as well as organizations serving rural Minnesotans.

This session will describe the process the Center for Prevention used to identify areas for improvement, key changes made to our process, and the outcomes of process modifications this far.

Participants will:

- Have a starting point for key conversations around equity in their organizations
- Gain inspiration, support, and resources to examine their own grantmaking policies, procedures and practices
- Acquire the ability to identify potential barriers and resistance (both internally and within the public)
- Understand how to begin to make the changes necessary to work towards more equitable outcomes for the communities they serve

PARTNER SPONSORED SESSION

INTL FCStone: The Pitfalls of Global Payments and Best Practices to Avoid Them

Learning Track: Effective Practices • Hot Topics • Partner Sponsored Session • Technology

Level: General

Room: Nichols

#GMN2017 #globalpayments @INTLFCStone

Byard P. Bridge, Jr., SVP, Global Payments, INTL FCStone
Sue-Ellen Speight, SVP, Global Payments, INTL FCStone

Managing foreign exchange (FX) in a project-based environment is a key piece of the financial activities of international aid and development organizations. With the myriad challenges involved—compliance risk, financial controls, opaque pricing—it is often difficult to determine the best currency conversion procedures. Millions of dollars in donor funds are wasted each year on currency conversions that can be avoided by adapting simple principles within an organization’s finance department. This session will highlight the leading FX industry practices using case studies and practical concepts which can be used to maximize the funding that is available at the local level. Join FX and currency experts for this informative session that will include a general overview of FX markets, advantages of using electronic platforms, and current trends in FX management.

Participants will:

- Enhance their understanding of current trends in global financial markets and contracting for local currency
- Learn the importance of accessing competitive exchange rates for international transfer and the concept of “competitive bidding” and how to apply it
- Find out about using online platforms to improve international funding operations and the inherent risk of leaving surplus funding in the field and how to avoid it
- Understand just-in-time funding and the accounting advantages of knowing foreign exchange costs up front