



# GRANTS MANAGERS NETWORK

12<sup>th</sup> Annual Conference  
March 20-22, 2017  
Hollywood, California



IN THE  
SPOTLIGHT

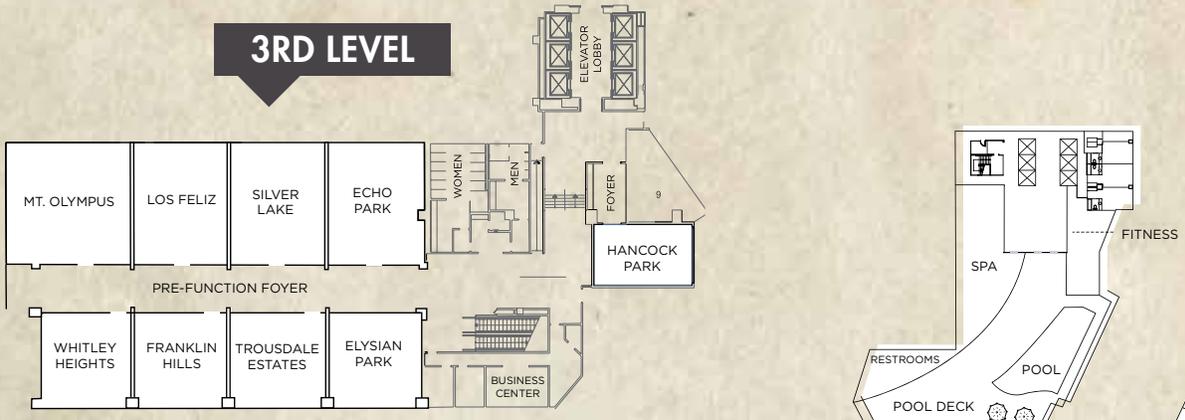


# HOTEL MAPS

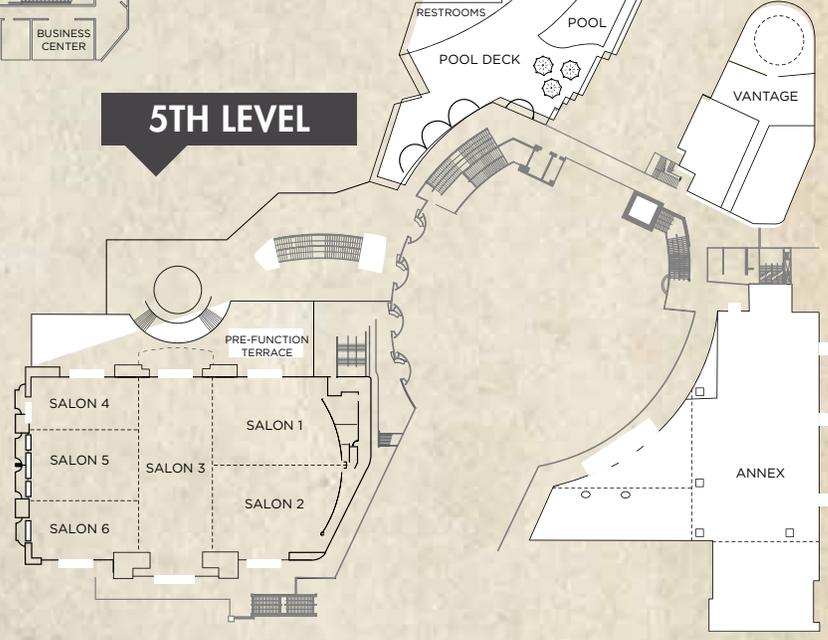
## MEZZANINE LEVEL



## 3RD LEVEL



## 5TH LEVEL



# CONFERENCE APP AND SOCIAL MEDIA



## Get Social with GMN2017!

Use social media to share what you're learning, who you're meeting, and the connections you're making at GMN2017. Look for the Twitter feed in the app!



#GMN2017  
[twitter.com/peakgrantmaking](https://twitter.com/peakgrantmaking)



[instagram.com/peakgrantmaking](https://www.instagram.com/peakgrantmaking)



[facebook.com/peakgrantmaking](https://www.facebook.com/peakgrantmaking)

**P.S.** Want to tweet about the specific conference session you're attending? Use the customized hashtags listed in the session descriptions!

## 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/e8Dlfb.i> for iPhone and iPad and <http://bit.ly/2lkLPWI> 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](mailto: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 TO HOLLYWOOD

## 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!

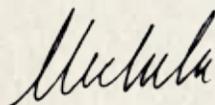
This is a very exciting time for philanthropy, but also for grants managers and Grants Managers Network—now known as **PEAK Grantmaking**! We are thrilled to share our new name and the evolution of this organization with you at this special conference gathering. (You'll hear more about PEAK Grantmaking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

## 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

## GMN Board Of Directors

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## 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.

**GMN STAFF****Michelle Greanias**

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**Leah E. Farmer**

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# CONFERENCE COMMITTEE

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.

## Conference Co-Chairs

### Jessica Hickok

The James Irvine Foundation

### Adam Sanders

The Leona M. and Harry B. Helmsley Charitable Trust

### Roy Williams

Greater New Orleans Foundation

## Connections Committee

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### Kyrstin Thorson Rogers, Co-Chair

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### Jamie Amagai

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League of Conservation Voters Education Fund & League of Conservation Voters

### Anne-Marie Schaaf

John Gogian Family Foundation

### Sonia B. Vick

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### Irene Williams

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## Session Designers

### Danielle Cheslog

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### Mary Giraulo

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### Beth Jarrard

J. Bulow Campbell Foundation

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League of Conservation Voters Education Fund & League of Conservation Voters

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The Leona M. and Harry B. Helmsley Charitable Trust

### Adriana Jimenez

ASPCA

### Kim Armstrong

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### Gillian Cervero

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### Suzanne Shea

Ford Foundation

### Danielle McLaughlin

The Skillman Foundation

### Ursula Stewart

New York State Health Foundation

### Allison Gister

Conrad N. Hilton Foundation

### Sue Fulton

Endowment for Health

### Jennifer Pedroni

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



# CONFERENCE SCHEDULE

## 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*

ROOM: SOLANO

[#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  
Bromelkamp: CRM for Grantmaking: It's About More Than Relationships  
ROOM: NICHOLS

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 Grants Managers (Seriously!)  
ROOM: LOS FELIZ

Is Being a Consultant the Next Move in Your Career?  
ROOM: SILVER LAKE

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

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  
Foundant User Group  
ROOM: NICHOLS

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!

# CONFERENCE SCHEDULE

## 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

Collaborating Smarter: Human-Centered Design Thinking

ROOM: LOS FELIZ

Getting Upstream: How Grants Management Can Grow Its Influence

ROOM: MT. OLYMPUS

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

ROOM: WHITLEY HEIGHTS

No Longer Arbitrary: Using Data to Drive Policy Decisions

ROOM: SILVER LAKE

Packing Up and Moving On(line): How to Select and Successfully Implement the Right System for Your Grantmaking Organization

ROOM: SOLANO

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

ROOM: STUDIO D

Red Flags—Donor Advised Funds Grantmaking

ROOM: STUDIO E

The Role of Grants Managers in Putting Culture into Practice

ROOM: ECHO PARK

Working Together: Effective Funder Collaboration in Disaster Grantmaking

ROOM: FRANKLIN HILLS

PARTNER SPONSORED SESSION

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

ROOM: NICHOLS

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

 #GMN2017 #hollywood #philanthropy

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.

SAG-AFTRA  
FOUNDATION

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

# CONFERENCE SCHEDULE

## 2:00 pm – 3:30 pm Roundtable Discussions

ROOM: VARIOUS; check the app and look for a handout for specific locations

### 2017 ROUNDTABLE TOPICS #GMN2017

Closing Grants: How Do You Do It?

[#closinggrants](#)

Collaboration vs. Cooperation

[#coopvscollab](#)

Corporate Philanthropy

[#corpphilanthropy](#)

Dashboards Show and Tell

[#dataviz](#) [#dashboards](#)

Donor Advised Funding

[#donoradvised](#)

ER Best Practices

[#ERphilanthropy](#)

Getting Money to the Ground: Creative Tactics for International Funders

[#intlfinders](#)

Grants Management During a Trump Era

[#Trump](#) [#grantsmanagers](#)

Hiring a Diverse Team

[#DEI](#) [#teamdiversity](#)

Human Rights Funders

[#humanrightsfunders](#)

Implementing a New Grants Management System

[#GMsystems](#)

Managing Final Reports and Renewals

[#GMreporting](#)  
[#GMrenewals](#)

PRIs and Impact Investing

[#PRIs](#) [#impactinvesting](#)

Public Charities

[#publiccharities](#)

Social Media When You're Already Busy

[#socialmedia4busyppl](#)

Training Staff: How Do You Do It?

[#stafftraining](#)

Wearing Many Hats: Staffing a Small Foundation

[#smallfdins](#)

### OR CHOOSE

#### SESSION

PARTNER SPONSORED SESSION

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

ROOM: NICHOLS

## 3:30 pm – 3:45 pm Coffee Break in the Exhibit Hall

Sponsored by NGOsource

## 3:45 pm – 5:15 pm

### SHORT TALKS

3:45 pm – 4:10 pm Round 1  
4:10 pm – 4:25 pm Round 1 Q&A  
4:35 pm – 5:00 pm Round 2  
5:00 pm – 5:15 pm Round 2 Q&A

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

### OR CHOOSE

#### SESSION

3:45 pm – 5:00 pm

PARTNER SPONSORED SESSION

Fluxx: Igniting Your Mission in 2017  
ROOM: NICHOLS

## 6:45 pm – 8:45 pm Dine Arouds

LOCATION: OFFSITE. MEET IN HOTEL LOBBY.

Join your colleagues for a fun, informal night on the town. Sign up in the Exhibit Hall.

# CONFERENCE SCHEDULE

## WEDNESDAY, MARCH 22

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 – 12:00 pm

### Exhibit Hall and Member Lounge Open

Sponsored by WizeHive

ROOM: STUDIOS A, B & C

9:00 am – 10:15 am

#### Concurrent Block E

Assessing Nonprofit  
Financial Health

ROOM: MT. OLYMPUS

Data: The Power Tool for  
Human Rights Funding

ROOM: FRANKLIN HILLS

Dive In: Disasters and Data

ROOM: ECHO PARK

How to Make the Move from  
Administrator to Advisor

ROOM: SOLANO

Impact Investing: The Intersec-  
tion of Money and Meaning

ROOM: STUDIO E

Improv Comedy for Grants  
Managers (Seriously!)

ROOM: LOS FELIZ

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

ROOM: STUDIO D

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

ROOM: NICHOLS

10:15 am – 10:30 am

### Networking Break

12:30 pm – 5:00 pm

### Post-Conference Event: Warner Bros. Studio Tour

LOCATION: OFFSITE. MEET IN HOTEL LOBBY.

 #GMwarnerbros

**NOTE: YOU MUST BE PRE-REGISTERED  
TO ATTEND THIS TOUR**

Warner Bros. Studio Tour Hollywood brings you closer than ever to the entertainment you know and love. Get ready to experience one of the busiest

movie studios in LA as you explore iconic backlots, DC Universe: The Exhibit, and original Batmobiles. Plus, you'll view one of the many soundstages where today's hottest TV shows and movies are made. Knowledgeable tour guides will take you behind-the-scenes of this incredible motion picture studio. Studio guests will walk the backlots which have exterior sets for classic films and TV shows such as Casablanca, Batman, Gilmore Girls, Friends, and more.

*Keep in mind that only registered conference attendees can register for the tour. Guests are welcome to bring still cameras, but please no video cameras or tape recorders. Due to space restrictions large bags are not permitted on the tour. Please also note that if you are planning to leave to go to the airport after the tour, we cannot accommodate your bags.*

#### SCHEDULE:

Bus leaves Loews Hollywood: 12:45 pm

Tour: 1:30 pm – 4:30 pm

Bus returns to hotel by 5:00 pm

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 @nonprofitwithballs

### 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.

## Learning Tracks

The 50+ concurrent sessions at the conference fall under nine learning tracks:

### Compliance

Master the complex and constantly evolving financial and legal issues impacting grants management.

### Data Intelligence

Expand your ability to gather, organize, analyze, and share data, information, and the resulting knowledge to improve your practices and the philanthropic impact of your grantmaking.

### Effective Practices

Improve your grantmaking practices, maximizing the resources devoted to achieving your mission.

### Hot Topics

Explore emerging issues in philanthropy that will change how you make grants now and in the future.

### Outcomes/Evaluation

Develop your understanding of the approaches, methods, and tools used by your colleagues and thought leaders to evaluate and track the results of your grantmaking.

### Skill Building

Hone your professional and personal skills to be more effective in your current job and advance your career.

### Technology

Make your grantmaking processes more efficient through technology integration and informed choices about new technologies.

## BLOCK A

Monday, March 20  
10:45 am – 12:00 pm

### Connecting Practices to Values-Based Grantmaking

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

[#GMN2017](#) [#GMvalues](#)

**Toby Berkman**, Associate, *The Consensus Building Institute*  
**Elizabeth Myrick**, Principal, *Elizabeth Myrick Consulting LLC*  
**Stacie Smith**, Senior Mediator, *The Consensus Building Institute*

Grantmaking practices are some of the most public, and sometimes the only, expression of a grantmaker's values—what the grantmaker cares about, how it sees the world, and its orientation toward its nonprofit partners—that grantseekers experience. All grantmakers have values whether in an explicit statement or implicit in how they talk about and approach their work. Despite this, grantmaking practices are not always as aligned to what grantmakers say they value as they could be, and many have never considered a connection between the two exists. GMN is engaging the field in a broad and deep conversation that directly connects how grants get made to a grantmaker's core identity and values, in order to help identify opportunities for increased alignment and improved practices.

#### Participants will:

- Review the most common explicit and implicit values held by funders
- Explore the connection between those values and current grantmaking practices, defining what practices support values and what practices can undermine values; and discuss how individual grantmakers and the field as a whole can bring values and practices into greater alignment.

### 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

# SESSION DESCRIPTIONS

## BLOCK A (CONTINUED)

### 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

[#GMN2017](#) [#S4Excel](#)

**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 Coates 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

[#GMN2017](#) [#predictiveanalytics](#) [#outcomes](#)

**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.

We'll also share some of the pitfalls commonly encountered while implementing a predictive analytics model.

#### Participants will:

- Find out why outcome analysis alone isn't enough and how predictive analytics can provide a fuller, future-view of your grantmaking
- Learn a methodology for building a predictive analytics model in your organization
- Gain an understanding of common pitfalls other have encountered when building predictive analytics methodologies

### Global Funding of Fiscal Intermediaries

LEARNING TRACK: COMPLIANCE

LEVEL: ADVANCED

ROOM: WHITLEY HEIGHTS

[#GMN2017](#) [#GMintermediaries](#) [#globalfunding](#)

**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](#)

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

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](#)

**Lisa Nespeca**, Owner, ChangeVantage Consulting

Grants management software is an expensive investment. Choosing and implementing it is a time-consuming project for your organization. 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

# CAMPAIGN FOR EXCELLENCE

## 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.”*



FORDFOUNDATION

—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



# IN GRANTS MANAGEMENT

## LIST OF FUNDERS

GMN is pleased to recognize the following funders for their visionary leadership, exemplary commitment to the field, and confidence in our work.

### Leadership Gifts

Bill & Melinda Gates  
Foundation

Ford Foundation

Robert Wood Johnson  
Foundation

Maragret A. Cargill Foundation

The William and Flora Hewlett  
Foundation

Kresge Foundation

### Major Gifts

The Annie E. Casey Foundation

Conrad N. Hilton Foundation

John D. and Catherine T. MacArthur  
Foundation

Bush Foundation

Houston Endowment

Charles Stewart Mott Foundation

The Carnegie Corporation of New York

Ewing Marion Kauffman Foundation

Surdna Foundation

Doris Duke Charitable Foundation

W.K. Kellogg 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

“*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  
KRESGE  
FOUNDATION

# SESSION DESCRIPTIONS

## BLOCK B

Monday, March 20  
1:30 pm – 2:45 pm

### The Art of Compliance: Effectively Communicating Complex Grantmaking Concepts

LEARNING TRACK: EFFECTIVE PRACTICES

LEVEL: GENERAL

ROOM: SOLANO

[#GMN2017](#) [#GMcompliance](#)

**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

[#GMN2017](#) [#teamwork](#)  
[@thebeliefcoach](#)

**Wendy Watson-Hallowell**, The Belief Coach, BeliefWorks

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

[#GMN2017](#) [#GMlegal](#)

**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

[#GMN2017](#) [#GMsoftware](#)

**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

implemented a large-scale change, and the pitfalls they experienced or managed to avoid. In this interactive session, participants will review a business school-style case study describing various project challenges, specifically around staff training and launch. The case will discuss common issues such as managing expectations, increased workload, and senior leadership support.

**Participants will:**

- Learn how one foundation moved through these challenges to successfully launch a new system
- Gain concrete strategies for addressing change management in your organization

## Connecting Practices to Values-Based Grantmaking

**LEARNING TRACK:** EFFECTIVE PRACTICES  
**LEVEL:** GENERAL  
**ROOM:** STUDIO E

 #GMN2017 #GMvalues

**Toby Berkman**, Associate, *The Consensus Building Institute*  
**Elizabeth Myrick**, Principal, *Elizabeth Myrick Consulting LLC*  
**Stacie Smith**, Senior Mediator, *The Consensus Building Institute*

Grantmaking practices are some of the most public, and sometimes the only, expression of a grantmaker's values—what the grantmaker cares about, how it sees the world, and its orientation toward its nonprofit partners—that grantseekers experience. All grantmakers have values whether in an explicit statement or implicit in how they talk about and approach their work. Despite this, grantmaking practices (what they do) are not always as aligned to what grantmakers say they value as they could be, and many have never considered that a connect between the two exists.

GMN is engaging the field in a broad and deep conversation that directly connects how grants get made to a grantmaker's core identity and values, in order to help identify opportunities for increased alignment and improved practices.

## Leading from the Middle: From Grants Management to Knowledge Creation

**LEARNING TRACK:** SKILL BUILDING  
**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: Tacking 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

# SESSION DESCRIPTIONS

## BLOCK B (CONTINUED)

### 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 corporate partners in philanthropy been responding to the new Development Agenda? Grants managers who oversee international giving, especially those with many corporate clients, will find this session particularly useful.

#### 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.

## BLOCK C

Monday, March 20  
3:00 pm – 4:15 pm

### The 8 Habits of Highly Effective Grants Managers

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

[#GMN2017 #8habits](#)

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

Building off the GMN2016 short talk on “The Seven Habits of Highly Effective Grants 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 grants 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 grants 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 grants managers

### Evaluation: Creating a Way to Measure Impact

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

[#GMN2017 #impact #evaluation @fluxlabs](#)

*David Goodman, Director of Impact, Flux Labs*  
*Ericka Novotny, Grants Management Director, Arcus Foundation*  
*Susan Rosenbloom, Director, Finance & Administration, Farash Foundation*

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

[#GMN2017 #grantdata #dataviz](#)

*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 necessary. 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

[#GMN2017 #GMreporting](#)

*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

[#GMN2017 #changingGM](#)

*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);

# SESSION DESCRIPTIONS

## BLOCK C (CONTINUED)

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!

## Improv 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 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.**

## 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

You are busy at your full-time grants management job. Your phone rings. Alas! It is a philanthropic colleague who values your expertise in grants management.

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

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

**Padmaja 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.

## BLOCK D

Tuesday, March 21  
11:15 am – 12:30 pm

### 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.

### 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 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

### 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, Surdna 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 approvals/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

# SESSION DESCRIPTIONS

## BLOCK D (CONTINUED)

### Packing Up and Moving On(online): How to Select and Successfully Implement the Right System for Your Grantmaking Organization

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

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

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 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.

#### 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

### Red Flags—Donor Advised Funds Grantmaking

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 Lagunoff, 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

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

LEARNING TRACK: EFFECTIVE PRACTICES • HOT TOPICS • SKILL BUILDING  
LEVEL: GENERAL  
ROOM: ECHO PARK

 #GMN2017 #GMculture

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

helps shape culture, grants managers play a cross-cutting role in their organizations and are uniquely positioned to identify how their organizational culture is aligned (or not) with its values. Explore how grants managers can shape culture, and learn how doing so increases organizational effectiveness and the success of our grantees.

**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

## Working Together: Effective Funder Collaboration in Disaster Grantmaking

**LEARNING TRACK:** EFFECTIVE PRACTICES

**LEVEL:** GENERAL

**ROOM:** FRANKLIN HILLS

[#GMN2017](#) [#disastergrantmaking](#)

**Stacie Freasier**, 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.

**Participants will:**

- 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

### PARTNER SPONSORED SESSION

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

**LEARNING TRACK:** PARTNER SPONSORED SESSION • TECHNOLOGY

**LEVEL:** INTERMEDIATE

**ROOM:** NICHOLS

[#GMN2017](#) [#softwareoverload](#) [@wizehive](#)

**Natalie Hirsch**, Director of Product Management, WizeHive  
**Anthony Putignano**, CTO, WizeHive

First came pen and paper. Then as we entered the digital age, we moved to PDF applications and spreadsheets. Finally came a level of efficiency previously unrivaled—a “management system” for every conceivable need. Somewhere along the way, grants managers began conforming to the limitations of these systems, making many compromises.

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.

**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

## OPTIONAL SESSION

(CONCURRENT WITH ROUNDTABLE DISCUSSIONS)

**Tuesday, March 21**

**2:00 pm – 3:30 pm**

### PARTNER SPONSORED SESSION

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

**LEARNING TRACK:** PARTNER SPONSORED SESSION • TECHNOLOGY

**LEVEL:** GENERAL

**ROOM:** NICHOLS

[#GMN2017](#) [#centralED](#) [@NGOsource](#)

**Kevin Ryan**, Director of Operations, NGOsource  
**Ken Tsunoda**, General Manager, NGOsource

Leaders in global philanthropy are aligning. To centralize their efforts on equivalency determinations (EDs), they're using NGOsource, a joint project of the Council on Foundations and TechSoup. 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 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 on the ground across the globe.

**Participants 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

# SESSION DESCRIPTIONS

## SHORT TALKS AND SESSION

Tuesday, March 21  
3:45 pm – 5:15 pm

You will have the option to attend either two short talks or Fluxx's Partner Sponsored Session. Each of the 25-minute short talks will be presented twice and will be followed by a 10-minute Q&A.

### SHORT TALKS

Round 1: 3:45 pm – 4:10 pm • Round 1 Q&A: 4:10 pm – 4:25 pm  
Round 2: 4:35 pm – 5:00 pm • Round 2 Q&A: 5:00 pm – 5:15 pm

### 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.

## SHORT TALKS (CONTINUED)

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

LEARNING TRACK: SHORT TALKS  
ROOM: STUDIO D

[#GMN2017](#) [#philanthropy](#) [#socialjustice](#)

**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-Restrict Support! An Innovative Approach to Funding

LEARNING TRACK: SHORT TALKS  
ROOM: ECHO PARK

[#GMN2017](#) [#unrestrictedgiving](#) [#philanthropy](#)

**Anuar Juraidini**, Grants Manager, Citi Foundation  
**Sarita Michaca**, 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.

### UN Sustainable Development Goals: Understanding the Role

LEARNING TRACK: SHORT TALKS  
ROOM: FRANKLIN HILLS

[#GMN2017](#) [#SustDevGM](#)

**Annie Rhodes**, Director, Foundation Strategy, MicroEdge + Blackbaud

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.

### Youth Giving Is a Philanthropic Force

LEARNING TRACK: SHORT TALKS  
ROOM: SOLANO

[#GMN2017](#) [#youthgiving](#)

**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.

OR CHOOSE  
SESSION:

SESSION  
3:45 pm – 5:15 pm

### PARTNER SPONSORED SESSION

### Fluxx: Igniting Your Mission in 2017

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

[#GMN2017](#) [#techsuccess](#) [@fluxxlabs](#)

**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

# SESSION DESCRIPTIONS

## BLOCK E

Wednesday, March 22  
9:00 am – 10:15 am

### Assessing Nonprofit Financial Health

LEARNING TRACK: EFFECTIVE PRACTICES  
LEVEL: INTERMEDIATE  
ROOM: MT. OLYMPUS

 #GMN2017 #nonprofithealth

**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.

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

LEARNING TRACK: DATA INTELLIGENCE  
LEVEL: GENERAL  
ROOM: FRANKLIN HILLS

 #GMN2017 #humanrightsfunding

**Myriam Fizazi-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 Funders 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 Funders 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 grants 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:

- 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

### 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, humor 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 grants 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 when, where, and how to put the *Disaster Philanthropy Playbook* to good use!

### 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

[#GMN2017](#) [#impactinvesting](#)

**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 impact 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

## Improv 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 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.**

## 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

[#GMN2017](#) [#fundingequity](#)

**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.



# SESSION DESCRIPTIONS

## BLOCK E (CONTINUED)

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





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