



PEAK2019

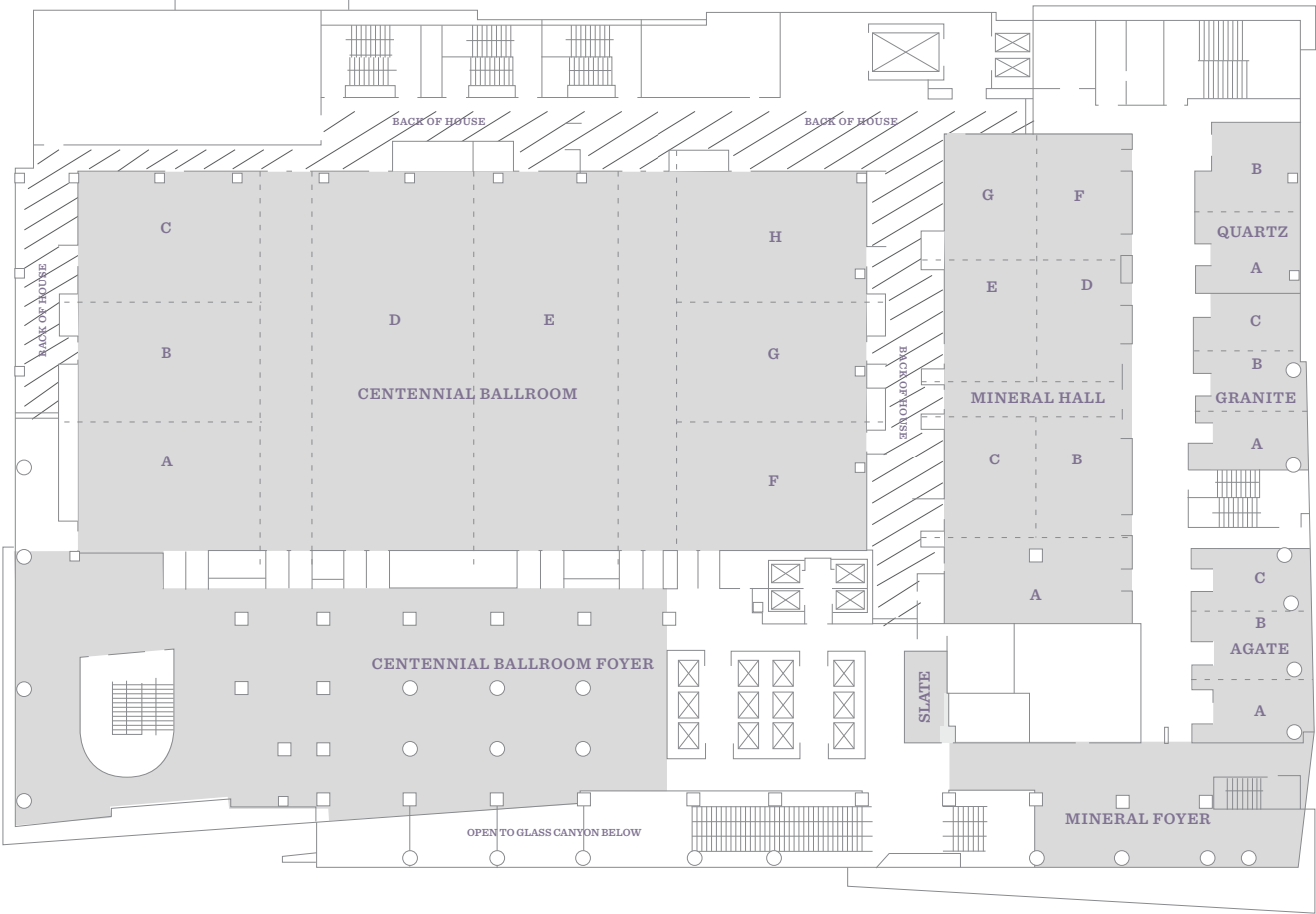
PEAK Grantmaking's 14th Annual Conference

March 11–13, 2019

Denver, Colorado

#PEAK2019

Hyatt Regency Denver, 3rd Floor



Welcome to PEAK2019

PEAK2019 Conference Co-Chairs Katrin Blucker Ludwig, Kelli Rojas, and Ursula Stewart and PEAK Grantmaking Executive Director Michelle Greanias wish to welcome you to our 14th annual conference.

To get you set for the best conference ever, we asked your hosts two important questions. Here are their messages to you.

What are you most looking forward to?

KATRIN: I'm looking forward to going to Denver—to making connections. Everyone's there to learn something, network, have fun, solve problems, and come up with great ideas they can implement to help change the world.

KELLI: Hitting the refresh button. Seeing folks I only get to see once a year. Making final decisions on what sessions I'm going to go to in each block. There are so many great sessions that I don't know how I'm going to choose.

URSULA: For me, it's always a homecoming. I'm seeing all my friends from past conferences and being introduced to new people who will become my friends. I'm also looking forward to seeing everyone smiling and the session rooms jam-packed.

MICHELLE: The energy that everyone brings to every session, networking event, and hallway conversation. I always come home with a head full of ideas for how we can meet member needs and support them in their pursuit of peak grantmaking practices.

What do you hope participants take away from the experience?

KATRIN: Something that inspires them, motivates them, and allows them to take action when they get back to their offices. You get bombarded at work, so you want to take away something that's practical and yet that makes a difference in a positive way.

KELLI: A connection with someone new who they can call up when they need to. I hope everyone leaves conference feeling that they have one thing they can go back and implement or suggest tomorrow as well as some ideas that are aspirational.

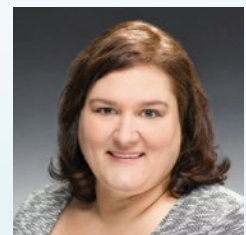
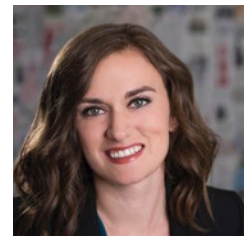
URSULA: I hope participants attend so many sessions that they are exhausted, and they can't wait to go back to their offices and put into practice everything they've learned at the conference—learned not only about best practices, but also about how others are applying them in their organizations.

MICHELLE: Inspiration and energy to return to their organizations ready to tackle the everyday challenges as well as to put forward new and bold ideas for the future. The knowledge they need to help lead and strengthen their organizations.

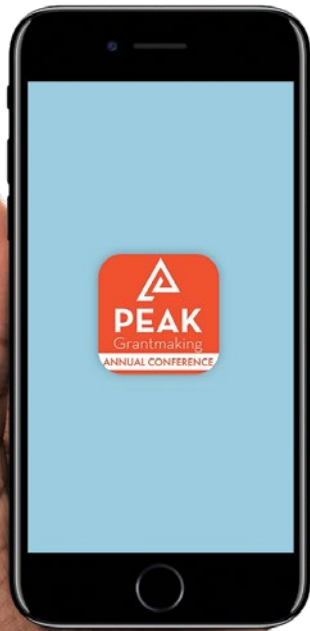
Over the next few days, you'll see Katrin, Kelly, Ursula, and Michelle at sessions, meals, plenaries, and networking breaks—not to mention at the registration desk, in the exhibitor hall, and all over the conference floor.

Please stop them to say “hi,” ask a question, or share a memory. They are eager to see you and ensure you have the best possible conference experience.

Let the learning begin!



#PEAK2019 App and Social Media



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Get Social with #PEAK2019!

Use social media to share what you're learning, who you're meeting, and the connections you're making at #PEAK2019. Look for the Twitter feed in the app.



#PEAK2019
twitter.com/peakgrantmaking



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#PEAK2019 - There's an App for That!

FOLLOW THESE STEPS TO GET STARTED



USED THE APP IN 2017 OR 2018 AND THE SAME EMAIL ADDRESS FOR PEAK2019 REGISTRATION?

1. Open the PEAK Grantmaking conference app on your device. Click "Log In" and "I have an account!," and enter your credentials if you're not already signed in. Use the "forgot your password?" link to reset your password if necessary.
2. If you're using a new, or different, device, search your app store for "PEAK Grantmaking Conference" and install the app. Enter your existing credentials, or reset your password if necessary.
3. Click the PEAK2019 image and the "Select This Event" button.

USED THE APP IN 2017 OR 2018 AND USING A DIFFERENT EMAIL ADDRESS FOR PEAK2019 REGISTRATION?

1. Create your account.
2. Use the instructions under "New Users" (below) to create an account.

NEW USER?

1. Download the app – Search your app store for "PEAK Grantmaking Conference" and install the app.  <https://appsto.re/us/e8DI fb.i> for iOS  <http://bit.ly/2lkLPWI> for Android
2. Create your account.
3. Open the app and click "Log In." Click "Get Started" and enter and confirm the email address you used to register for PEAK2019, then add a password and your name. Click "Sign Up."
4. A confirmation message from "PEAK Grantmaking Conference" will be sent to your email account. Follow the instructions to verify your app account.
5. Click the PEAK2019 image in the app and the "Select This Event" button.

READY TO DIVE IN?

- **Customize the app** – Add (or update) your photo and profile, and choose your preferences—including directory listing, email display, and availability for messaging with other attendees.
- **Build your schedule** – Create your personal schedule using the session list, and explore the exhibitor and speaker lists and the attendee directory. Note: All educational sessions are available on a first-come, first-served basis.
- **Stay Informed** – The app menu will include maps to help you get around, a link to the PEAK2019 community on Connect, and local information to make your time in Denver both fun and productive.
- **Plus**, check out "How to Use This App" for a tour of features that will enhance your conference experience.
- **Look for daily highlights** in the app menu and alerts for upcoming activities.

Questions about the app?

Visit the PEAK Grantmaking table near registration if you need help with the app, or contact Carolyn Sosnowski, PEAK Grantmaking e-learning and content manager, at carolyn@peakgrantmaking.org.

Conference Networking Opportunities

Don't miss these opportunities to make connections and expand your network!

NEWCOMERS ORIENTATION AND WELCOME

Sunday, March 10, 5:30 pm – 6:30 pm

Location: Centennial F-H

Are you new to PEAK Grantmaking? Is this your first time at a PEAK Grantmaking Annual Conference? Have you been to an annual conference before, but would like a refresher on how to make the most of it? If you answered "Yes" to any of these questions, join us at this lively, participatory orientation to learn about all things PEAK Grantmaking, meet other newcomers, and hear advice on the best conference sessions for your interests.

HAPPY HOUR

Sunday, March 10, 6:00 pm – 7:30 pm

Location: Peaks Lounge, 27th Floor

Start your networking before the PEAK2019 conference officially begins. Members of the Connections Committee will welcome you and help you connect with others. (Cash bar)

EXHIBIT HALL

Location: Mineral Hall B-G

Check out all our PEAK2019 Exhibitors have to offer in the Exhibit Hall. Open throughout the conference.

DENVER MORNING WALKS & RUNS

Each morning, Monday – Wednesday,

7:00 am – 7:45 am

Location: Meet in the hotel lobby

SPEED NETWORKING

Monday, March 11, 4:30 pm – 5:30 pm

Location: Mineral Hall A

Bring lots of business cards to this event. You'll meet a new colleague every few minutes in a speed networking exercise that gives you a quick chance to learn more about your peers and share your professional story.

OPENING RECEPTION

Monday, March 11, 5:45 pm – 7:15 pm

Location: Centennial Foyer

Celebrate the power of coming together with your peers across philanthropy to elevate your leadership, improve your organization's practices, and re-energize for the year ahead. Enjoy the food, fun, and photo booth that captures the special moments.

REGIONAL CHAPTER MEETINGS

Tuesday, March 12, 9:00 am – 11:00 am

Network and learn with your peers from your local area. Check the app or the flyer in your registration packet for the list of Regional Chapter meetings and locations.

VOLUNTEER RECEPTION

Tuesday, March 12, 5:30 pm – 6:30 pm

Location: Peaks Lounge, 27th Floor

BY INVITATION ONLY.

DINE AROUNDS

Tuesday, March 12, 6:45 pm – 8:45 pm

Location: Various; please sign up in the Exhibit Hall

Get together with colleagues, recent and long-time, for a fun, informal night on the town. Sign up in the Exhibit Hall near the Member Lounge.

PEAK2019 Conference Committee

The PEAK Grantmaking Board of Directors would like to thank the conference co-chairs, proposal reviewers, and connections committee members—as well as their employers—for all their support of PEAK2019.

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Acknowledgements

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

Speakers and Presenters**Conference Sponsors****Conference Exhibitors**

Hyatt Regency Denver

Marva Lewis

The Event Professionals

Denise Barreto

And, all the grants management professionals who volunteer their time, expertise, and energy to make PEAK Grantmaking possible.

Schedule-at-a-Glance

Use the PEAK2019 app to read session descriptions, search by track, and view presenter biographies.

SUNDAY, MARCH 10, 2019

		Location
2:00 pm – 5:00 pm	Conference Registration	Centennial Foyer
5:30 pm – 6:30 pm	Newcomers Orientation and Welcome	Centennial F-H
6:00 pm – 7:30 pm	Happy Hour	Peaks Lounge, 27 th Floor

MONDAY, MARCH 11, 2019

		Location
7:00 am – 4:00 pm	Conference Registration	Centennial Foyer
7:00 am – 7:45 am	Denver Wellness Walk & Run	Meet in the lobby
7:30 am – 9:00 am	Breakfast and Networking	Centennial Foyer
7:30 am – 8:45 am	Regional Chapter Officers Meetings & Breakfast	Centennial F
8:00 am – 5:00 pm	Exhibit Hall	Mineral Hall B-G
9:00 am – 10:30 am	Opening Plenary <i>Sponsored by Annenberg Foundation</i>	Centennial Ballroom
10:30 am – 10:45 am	Coffee Break <i>Sponsored by Boettcher Foundation</i>	Exhibit Hall (Mineral Hall B-G)
10:45 am – 12:00 pm	Concurrent Block A	
12:00 pm – 12:15 pm	Networking Break	Exhibit Hall (Mineral Hall B-G)
12:15 pm – 1:15 pm	Lunch, Special Announcements & Volunteer Recognition	Centennial Ballroom
1:15 pm – 1:30 pm	Networking Break	Exhibit Hall (Mineral Hall B-G)
1:30 pm – 2:45 pm	Concurrent Block B	
2:45 pm – 3:00 pm	Coffee Break	Exhibit Hall (Mineral Hall B-G)
3:00 pm – 4:15 pm	Concurrent Block C	
4:15 pm – 4:30 pm	Networking Break	Exhibit Hall (Mineral Hall B-G)
4:30 pm – 5:30 pm	Speed Networking	Mineral Hall A
5:30 pm – 5:45 pm	Networking Break	Exhibit Hall (Mineral Hall B-G)
5:45 pm – 7:15 pm	Opening Reception	Centennial Foyer

TUESDAY, MARCH 12, 2019

		Location
7:00 am – 7:45 am	Denver Wellness Walk & Run	Meet in the lobby
7:30 am – 9:00 am	Breakfast and Networking	Centennial Foyer
8:00 am – 5:00 pm	Conference Registration	Centennial Foyer
8:00 am – 5:00 pm	Exhibit Hall	Mineral Hall B-G
9:00 am – 11:00 am	Regional Chapter Meetings	Check app
11:00 am – 11:15 am	Coffee Break <i>Sponsored by Foundant Technologies</i>	Exhibit Hall (Mineral Hall B-G)
11:15 am – 12:30 pm	Concurrent Block D	
12:30 pm – 12:45 pm	Networking Break	Exhibit Hall (Mineral Hall B-G)
12:45 pm – 1:45 pm	Lunch Plenary	Centennial Ballroom
1:45 pm – 2:00 pm	Networking Break	Exhibit Hall (Mineral Hall B-G)
1:45 pm – 2:15 pm	Edgar Villanueva Book Signing <i>Sponsored by TD Charitable Foundation</i>	Centennial Foyer
2:00 pm – 3:30 pm	Short Talks	See page 12 or check app
3:30 pm – 3:45 pm	Coffee Break	Exhibit Hall (Mineral Hall B-G)
3:45 pm – 5:15 pm	Roundtable Discussions	See page 13 or check app
5:30 pm – 6:30 pm	Volunteer Reception (By invitation only.)	Peaks Lounge, 27 th Floor
6:45 pm – 8:45 pm	Dine Arouds	Meet in the lobby

WEDNESDAY, MARCH 13, 2019

		Location
7:00 am – 7:45 am	Denver Wellness Walk & Run	Meet in the lobby
7:30 am – 9:00 am	Breakfast and Networking	Centennial Foyer
8:00 am – 12:00 pm	Exhibit Hall	Mineral Hall B-G
9:00 am – 10:15 am	Concurrent Block E	
10:15 am – 10:30 am	Networking Break	Exhibit Hall (Mineral Hall B-G)
10:30 am – 12:00 pm	Closing Plenary	Centennial Ballroom
12:00 pm – 4:30 pm	Post-Conference Events (See registration desk for details.)	

Plenary Speakers

OPENING PLENARY *Sponsored by Annenberg Foundation*

Monday, March 11, 2019, 9:00 am – 10:30 am



Jess Ladd is the founder and CEO of Callisto, a nonprofit that creates technology to combat sexual assault, support survivors, and advance justice. Callisto's online sexual assault reporting system helps detect repeat sexual offenders and connect survivors with support.

Before founding Callisto, Jess developed a series of online services for STD prevention and control, worked for the White House Domestic Policy Council, and served in such positions as sexual health educator, policy advocate, and researcher for a variety of organizations.

Ladd is a recipient of the 2018 Skoll Award for Social Entrepreneurship, a 2018 Ashoka Fellow, and a Senior TED Fellow. She is co-founder of The Social Innovation Lab, an incubator for startups for social good, in Baltimore.

TUESDAY LUNCH PLENARY

Tuesday, March 12, 2019, 12:45 pm – 1:45 pm

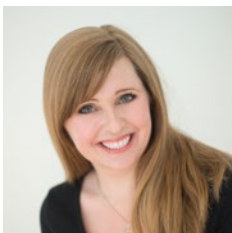


Edgar Villanueva is a nationally-recognized expert on social-justice philanthropy and author of *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance*, a new book which offers hopeful and compelling alternatives to the dynamics of colonization in the philanthropic and social finance sectors.

Edgar currently serves as chair of the board of directors of Native Americans in Philanthropy, a board member of the Andrus Family Fund, and vice president of Programs and Advocacy at the Schott Foundation for Public Education. In addition to working in philanthropy for many years, he has consulted with numerous nonprofit organizations and national and global philanthropies on advancing racial equity inside of their institutions and through their investment strategies.

CLOSING PLENARY

Wednesday, March 13, 2019, 10:30 am – 12:00 pm



Eli Cloud co-founded Sister Supply, a grassroots non-profit organization that provides menstrual products to women and girls in need in Memphis, in 2015 after she recognized that the lack of affordable access to essential feminine hygiene resources can create a barrier to achievement for many women and

girls. Sister Supply also works to destigmatize the discussion of menstruation and to educate women and girls about sustainable menstrual products.

In addition to leading Sister Supply, Eli works fulltime as the business development manager for ANF Architects, a

leading Memphis architectural firm. She also is the director of development for RiverArtsFest, the largest outdoor juried artist market and urban street festival in the mid-South.

Eli will speak about the critical need in her community that Sister Supply is helping to meet. In a fireside chat on **"Grassroots Change and the Ripple Effect"** with **Nupur Chaudhury**, program officer at the New York State Health Foundation, Eli will discuss the value of rightsizing our goals for community change. She will use the evolution of Sister Supply as an example of how our smallest actions can have a tremendous impact on creating positive change. Eli's insights will challenge grants management professionals—who are change agents, too—and call them to action.

Conference Program Sessions

Use the PEAK2019 app to read session descriptions, search by track, and view presenter biographies.

MONDAY, MARCH 11, 2019

Concurrent Block A - 10:45 am - 12:00 pm

Session Title	Presenters	Room #	Audience
Centralized, Decentralized, or Hybrid: How to Make Any Corporate Grantmaking Structure Successful	Caitlin Caspersen, Consultant, TCC Group; Rebecca Ferguson, Senior Director, Grants Operations, Salesforce.org; Sarita Michaca, Grants Manager, Citi Foundation	Agate C	Corporate
Data Drives Equity in Nonprofit Talent and Leadership Development	Katie Byerly, Program Officer, The Kresge Foundation; Joyce Holliman, Program Operations and Information Management Associate, The Kresge Foundation; and Carla Taylor, Director, Community Wealth Partners	Centennial G	All
Guide to Preparing for a Systems Selection	Lisa M. Nespeca, Owner, ChangeVantage Consulting	Centennial H	All
Move from Grantmaker to Changemaker	Tracy Wilson, Program Officer, Advancing a Healthier Wisconsin Endowment	Centennial F	All
Overcoming Invisibility: Funding Native Issues	Mercedes Plendl, Program Associate, Better Way Foundation	Quartz	All
The Secret to Recapturing Foundation Time and Capacity	Lee Kuntz, Process Improvement Trainer, Innovation Process Design, LLC	Agate AB	All
Tying Grant Practices to Foundation Values	Aimée Bruederle, Grants Officer, William and Flora Hewlett Foundation; Brooke Treadwell, Grants Officer, William and Flora Hewlett Foundation	Granite AB	All
Why Asking about the Cost of Fundraising Isn't Enough	Andy Davis, Director of Education, BoardSource	Mineral A	All
EXHIBITOR-SPONSORED SESSION: How to Evaluate the Costs of Global Payments	Byard P. Bridge, Jr. and Sue-Ellen Speight, Senior Vice Presidents, Payments Division, INTL FCStone Ltd.	Granite C	All

Concurrent Block B - 1:30 pm - 2:45 pm

Session Title	Presenters	Room #	Audience
Better Outcomes and Collaboration: Houston My Brother's Keeper Pilot Study	David Goodman, VP of Ecosystem Development, BrightHive	Agate AB	All
Budget Tools as Aids in Strategic Planning	Tamika Holman-Ricks, Grants Management Associate, William Penn Foundation; Barbara Scace, Director of Grants Management, William Penn Foundation; Samantha Shain, Database Administrator, William Penn Foundation	Centennial F	All
A Case Study in Participatory Grantmaking: RSF Shared Gifting	Kelley Buhles, Senior Director, Philanthropic Services, RSF Social Finance; Ellie Lanphier, Program Manager, Philanthropic Services, RSF Social Finance	Quartz	All
Data Privacy in the Post-Internet Age: A Facilitated Workshop	Martha Lackritz-Peltier, Senior Counsel, TechSoup; Marla Lopez, Grants Officer, Open Society Foundations; Kyle Reis, Senior Director, TechSoup	Mineral A	All
Embedding Equity Inside and Out: How to Dive In without Drowning	Angela K. Fruscante, Principal, Knowledge Designs to Change	Centennial H	All
The Future of Donor-Advised Funds	Shermane Bilal, Senior Manager, Grants & Funds, Rockefeller Philanthropy Advisors; Elizabeth Donohue, Grant Administrator, Rockefeller Philanthropy Advisors; Ashley Hezel, Grants Manager, The Pittsburgh Foundation; Liza Lagunoff, Director, Grants Budgeting, The New York Community Trust	Granite AB	All
Ivory Tower No More: Opening Up to Strengthen Philanthropy	Amy Anderson, Program Operations Manager, Bush Foundation; Janet Camarena, Director, Transparency Initiatives, Candid.; Mona Jhawar, Learning and Evaluation Manager, The California Endowment; Cheryl Milloy, Senior Learning and Evaluation Officer, Marguerite Casey Foundation	Agate C	All
Magnifying Your Impact by Maximizing Software	Brad Ambelang, Program & Grants Associate, Greater Milwaukee Foundation; TeQuion Brookins, Director of Operations, McGregor Fund; Susan B. Clark, Director, Grants and Communications, Gaylord and Dorothy Donnelley Foundation; and Sarita M. Michaca, Grants Manager, Citi Foundation	Centennial G	All
EXHIBITOR-SPONSORED SESSION: Why Curiosity Matters	Erin Pinkus, Research Scientist, SurveyMonkey and Nichole Vine, Content Marketing Manager, SurveyMonkey	Granite C	All

Conference Program Sessions

Use the PEAK2019 app to read session descriptions, search by track, and view presenter biographies.

MONDAY, MARCH 11, 2019

Concurrent Block C - 3:00 pm - 4:15 pm

Session Title	Presenters	Room #	Audience
Aligning Investment Strategy and Grantmaking Operations	Christopher Percopo, Director of Grants Management and Special Program Operations, The Leona M. and Harry B. Helmsley Charitable Trust and Christopher Rapcewicz, Director of Risk and Investment Operations, The Leona M. and Harry B. Helmsley Charitable Trust	Centennial G	All
Compliance as a Strategic Tool in Complex Grantmaking	A. Nicole Campbell, Chief Executive Officer, Build Up Advisory Group	Centennial H	All
Elevating the Role of Grants Professionals through Strategic, Change Management	Margaret Egan, Principal, Egan Consulting; Chindaly Griffith, President, Streamlife Consulting; Adam Liebling, Director of Grants Management, The Robert Wood Johnson Foundation; Ursula Stewart, Grants Manager, New York State Health Foundation	Agate AB	All
Facilitating Difficult Conversations in the Workplace	Erin Speltz, Conflict Resolution Center	Centennial Ballroom	All
Foundation Support for Nonprofit Advocacy	Sara Guillaume, Senior Director of Grantmaking Operations, The Colorado Health Foundation; Carlos Martinez, Executive Director, Latino Community Foundation of Colorado; Natalie Roetzel Ossenfort, Director, Texas Office, Alliance for Justice; and Alison Friedman Phillips, Manager of Programs, The Women's Foundation of Colorado	Mineral A	Public Charity Grantmakers & Private Grantmakers
Implementing Equitable Grantmaking Practices	Melissa Sines, Programs and Knowledge Director, PEAK Grantmaking	Granite AB	All
Navigating Faith and Regulation: Compliance and Competency in Religious Grantmaking	Kaitlin Ostlie, Grants Associate, InFaith Community Foundation	Quartz	All
Operationalizing a Focus on Equity	David Greco, President and CEO, Social Sector Partners	Centennial F	All
EXHIBITOR-SPONSORED SESSION: Another Way: Exploring New Tools to Simplify and Streamline Your Work	Roberto Cremonini, Senior Partner, and Alfred Gracombe, President and Founding Partner, GivingData; plus, cameo appearances by GivingData clients and consultants	Granite C	All
EXHIBITOR-SPONSORED SESSION: Best Practices for Designing Effective Grants Management Workflows	Rob Livada, Vice President, Solutions Architecture, CyberGrants and Jeff Summers, Chief Marketing Officer, CyberGrants	Agate C	All

Conference Program Sessions

Use the PEAK2019 app to read session descriptions, search by track, and view presenter biographies.

TUESDAY, MARCH 12, 2019

Regional Chapter Meetings 9:00 am - 11:00 am [Check app](#) All

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

Session Title	Presenters	Room #	Audience
Bring Your Brave Face: We're Talking Race, Diversity, and Inclusion	Denise Barreto, Managing Partner, Relationships Matter Now, LLC	Agate AB	All
Building Equity: Incremental and Intentional Steps Towards Change	Nupur Chaudhury, Program Officer, New York State Health Foundation; Ursula Stewart, Grants Manager, New York State Health Foundation	Centennial F	All
Bust the "Overhead" Myth; Pay True Indirect Costs	James Gallagher, Senior Grants Manager, Future of Work, Ford Foundation; Jessica Halverson, Grants Officer, Environment, William and Flora Hewlett Foundation; and Arum Lansel, Program Operations Manager for Organizational Effectiveness, David and Lucile Packard Foundation	Centennial H	All
Get Woke: Are You Opening or Closing the DEI Door?	Janet Camarena, Director, Transparency Initiatives, Candid.	Agate C	All
Getting to Impact: A Measurement Blueprint	Michelle DiSabato, Consultant, Philanthropy-Strategy & Communications, Community Impact Consultants, Inc.	Centennial G	All
Participatory Grantmaking 101: Inclusive and Effective Strategic Practice	Jen Bokoff, Director of Stakeholder Engagement, Candid. and Arlene Wilson-Grant, Grants Manager, Disability Rights Fund & Disability Rights Advocacy Fund	Centennial G	All
The Power Equation: Equalizing Power for Win/Win Solutions	Genise Singleton, Program Manager, The Kresge Foundation; Wendy Watson-Hallowell, Belief Coach, Frontier Consulting Group	Quartz	All
EXHIBITOR-SPONSORED SESSION: Complex Hierarchical Taxonomies Made Simple: A Vancouver Foundation Case Study	Dave Doig, Director, Grants and Community Initiatives, Vancouver Foundation; Malcolm Klotz, Founder and Chief Technology Officer, Business Solutions Re-Solved	Granite C	All
EXHIBITOR-SPONSORED SESSION: Incorporating Diversity, Equity, and Inclusion Into Grantmaking: Can Technology Help?	Julia Cannon, Senior Product Manager, roundCorner	Granite AB	All

Short Talks - 2:00 pm - 3:30 pm

Session Title	Presenters	Room #	Audience
Communicating and Facilitating the End of Grant Funding	Alexis Bylander, Senior Public Affairs Manager, ClearWay Minnesota	Centennial F	All
Data's Role in Driving Performance, Internally and Externally	Steve Casey, Associate Director, Grants Management, MacArthur Foundation	Centennial H	All
From Transactional Grantmaking to Impactful Investing: An Outcomes Framework	Tristi Charpentier, Vice President, Strategic Initiatives, Huey and Angelina Wilson Foundation	Centennial G	All
Investing in Impact: The Role of Strong Grantee Relationships	Rebecca Ferguson, Senior Director, Grants Operations, Salesforce.org	Agate AB	All
It's Complicated: A Guide to Monitoring	Kate Mendez, Grant Compliance and Accounting Manager, United Way of Greenville County, South Carolina	Mineral A	All
Leveraging Tech for Social Good	Jess Ladd, Founder and CEO, Callisto	Granite AB	Corporate
EXHIBITOR-SPONSORED SESSION: Love It or List It: Deciding Whether to Fix or Replace Your Grants Management System	Nikki Barrett, Managing Director, Grantbook; Janet Disla, Senior Grants Manager, The Nathan Cummings Foundation; Satonya Fair, Vice President/Chief Philanthropy Officer, The Executive Leadership Council; and Carmelita Mitchell, Senior Director of Grants, Energy Foundation	Granite C	All

Conference Program Sessions

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TUESDAY, MARCH 12, 2019

Roundtable Discussions - 3:45 pm - 5:15 pm

Session Title	Presenters	Room #	Audience
Distinguishing a Charity as “Public”	Liza Lagunoff, Director, Grants Management, The New York Community Trust	Centennial Ballroom	Public Charity Grantmakers
Donor-Advised Funds	Maggie Murphy, Grants Manager, The New York Community Trust	Centennial Ballroom	All
Effective Communication in a Digital Age	Allison Rains, Senior Grants Manager, Simons Foundation	Centennial Ballroom	All
Impact Measurement Showcase*	Adam Cimino, Grants Manager, James Irvine Foundation; Johnna Flood, Senior Director, Evaluation and Learning, Mile High United Way; Dan Gaff, Director of Grants Management, May & Stanley Smith Charitable Trust; Jennifer Ho, Learning Officer, Conrad N. Hilton Foundation; Avi Khullar, Associate Director, Impact & Learning, Stuart Foundation	Centennial G	All
Let’s Talk General Operating Grants*	Erin Baird, Director of Grants, Allegany Franciscan Ministries; Jaime Dixon, Program Officer - Community Investments, Foundation for a Healthy St. Petersburg; Anna Huynh, Senior Grants Manager, Sunlight Giving; and Ryan Rodriguez, Grants Manager, Community Foundation for Greater Atlanta	Quartz	All
Power Hour with Edgar Villanueva*	Edgar Villanueva, Author of <i>Decolonizing Wealth</i> (3:45pm - 4:45 pm)	Centennial F	All
Private Foundation IRS Requirements*	Thomas Blaney, Partner, O’Connor Davies and Christopher Petermann, Partner, O’Connor Davies	Mineral A	Private Grantmakers
Process, What Process? Cat-Herding for Grants Managers	Jessica Richards, Program Officer, William Penn Foundation	Centennial Ballroom	All
Reducing Risk and Communicating about Compliance: Using Intermediaries in Grantmaking	Krista Batey, Director of Grantmaking and Compliance, Arabella Advisors; Kathleen Flynn, Compliance Officer, New Venture Fund; Elsa Leon, Grants Manager, John D. & Catherine T. MacArthur Foundation; and Jennifer Shipp, Senior Counsel, William and Flora Hewlett Foundation	Centennial Ballroom	All
The Roles We Lead: What Next?	Leslie Silverman, Partner, Philanthropy Northwest	Centennial Ballroom	All
Strategies to Improve Diversity and Inclusion on Nonprofit Staffs and Boards	Ashley Navarre, Grants Manager, Baptist Community Ministries	Centennial Ballroom	All
Streamlining Your Grants Process	Kelly Clardy, Senior Grants Specialist, Maddie’s Fund; Shelly Thompson, Director of Grants, Maddie’s Fund	Centennial Ballroom	All
Supporting Your Grantees’ Financial Resilience*	Hilda Polanco, Founder & CEO, FMA	Granite AB	All
Systems Implementation	Lisa M. Nespeca, Owner, ChangeVantage Consulting	Centennial Ballroom	All
What Keeps You Up at Night? (Corporate Edition)	Michelle Greanias, Executive Director, PEAK Grantmaking	Agate AB	Corporate
EXHIBITOR-SPONSORED SESSION: 12 CRM Features Every Foundation Needs*	Henry A. Bromelkamp, President, Bromelkamp Company LLC	Granite C	All
EXHIBITOR-SPONSORED SESSION: Local Voices in the Lead: Tools for Community-Led Grantmaking*	Alison Carlman, Director of Impact, GlobalGiving; Courtney Eskew, Vetting and Grants Management, GlobalGiving; and Jonathan Kolo, President, Timeout for Africa Education and Sports Foundation	Agate C	Public Charity Grantmakers

*This is a traditional panel session versus a more informal roundtable.

Conference Program Sessions

Use the PEAK2019 app to read session descriptions, search by track, and view presenter biographies.

WEDNESDAY, MARCH 13, 2019

Concurrent Block E - 9:00 am - 10:15 pm

Session Title	Presenters	Room #	Audience
Assessing Grantee Financial Health	Jessica Hickok, Grants Manager, Pisces Foundation; Hilda Polanco, Founder & CEO, FMA	Centennial F	All
Beyond Diversity Training: Weaving Equity and Inclusion into All Work	Matt Aliberti, Director, Impact, United Way Worldwide and Todd Batiste, Senior Vice President, Community Impact, United Way of Southeast Louisiana	Centennial H	All
Deal Makers and Deal Breakers: Undercovering Patterns in Our Openness	Stacy Van Gorp, Executive Director, McElroy Trust	Centennial G	All
Lessons in Trust-Based Philanthropy	Angela Carr, Grants Manager, Weingart Foundation; Marissa Crawford, Program Associate, International Women's Health Coalition; Phil Li, President, Robert Sterling Clark Foundation; Zia Maumenee, Grants Manager, Headwaters Foundation; and Elaine Mui, Grants & Operations Manager, General Service Foundation	Quartz	All
Measuring Impact in Corporate Grantmaking: Moving from Overhead to Outcomes	Grace Piotrowski, Campaign Manager, Mission Measurement and Marcy Twete, Managing Director, Corporate Market Development, Mission Measurement	Granite AB	Corporate
Rapid-Response Grantmaking: Creating Nimble Processes to Support Urgent Movements	Jenifer Fernandez Ancona, VP, Strategy & Member Engagement, Women Donors Network; Kelli Rojas, Grants Manager, Rose Community Foundation; Mayra Hidalgo Salazar, Hudson Valley Program Director, North Star Fund; Kyrstin Thorson-Rogers, Grants Manager, Proteus Fund; Shireen Zaman, RISE Together Fund	Granite C	All
Security Essentials for Grants Management	Jim Rutt, Chief Information Officer, Dana Foundation	Agate AB	All
EXHIBITOR-SPONSORED SESSION: Foundant Insider Scoop	Chris Dahl, President, Foundant Technologies and Sammie Holzwarth, Product Manager, Foundant Technologies	Agate C	All

PEAK2019 Exhibitors

CHECK OUT THE MOST ACTIVE SPOT AT PEAK2019!

Take a moment to participate in all the action in the Exhibit Hall, where you can:

Mineral Hall BG

- Check out the Member Lounge, sponsored by Fluxx.
- Grab a cup of coffee and a snack.
- Learn about valuable products and services to improve your grantmaking practices.
- Sign up for Dine Arounds.
- Charge your device at our complimentary charging station, sponsored by The Leona M. and Harry B. Helmsley Charitable Trust.
- Complete your Exhibitor Bingo Card (included in your registration packet) for a chance to win valuable prizes!

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Post-Event Activities

GROUP TOUR

Banjo Billy Tour

As the Queen City of the Plains, Denver has long been a destination for those traveling west. But, it's been a rocky road from mining town to metropolis. Join us on our 90 minute Denver tour to learn about Denver's corrupt past, promising future, and the ghosts and criminals who still form our identity today. The tour is roughly two hours. The bus will leave the hotel at 1:15 pm and return by 3:45 pm.

Cost: \$45 per person, including beverages and snacks. Pre-Registration is required. Check registration desk for availability.

NON-GROUP TOURS

(These tours must be coordinated individually.)

Denver Landmark: Brown Palace Hotel and Spa Tour

Open since August 12, 1892, the Brown Palace Hotel and Spa has become one of the most beloved Denver hotels. The hotel offers both public and private tours of its property to acquaint guests with the history, traditions, architecture, art, and amenities. Knowledgeable guides conduct all tours, which take approximately one hour. Online reservations are required. Walk-ins occasionally may be accommodated on a space-available basis.

Cost: \$15 per person, payable at the Brown Palace hotel on the day of the tour. (This is a public tour.) For additional information, visit www.brownpalace.com/our-hotel/history/hotel-tour

Celestial Seasonings Tea Factory

(40 minutes from hotel)

Take a free factory tour in beautiful Boulder. Learn all about the wonderful world of tea—from raw ingredients to finished products. See how Celestial Seasonings' wholesome products are blended, packaged, and shipped. You'll never look at tea the same way again!

Cost: Free. For additional information, visit www.celestialseasonings.com/visit-us

Transportation not provided.

OTHER OPTIONS IN DENVER

From self-guided walking tours of the city to day-long excursions to the Rocky Mountains, explore the Mile High City through the best Denver Tours. Please visit www.denver.org.

A night-time photograph of the Seattle skyline. The Space Needle is prominently featured on the left, illuminated with warm lights. The background is filled with various skyscrapers, some of which are also lit up. The sky is a deep blue, and the foreground shows some blurred greenery and city lights.

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