

#PEAK2018



Creating the Future

TOGETHER

March 19 – March 21, 2018



HOTEL MAPS

Hilton Orlando Lake Buena Vista

1751 Hotel Plaza Boulevard
Lake Buena Vista, FL 32830

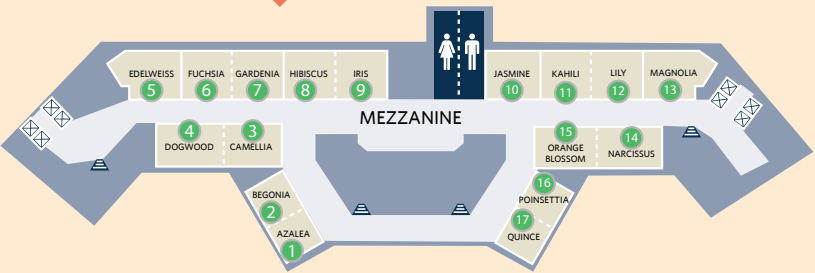
Conference

- 1 ROSE
- 2 CRYSTAL
- 3 INTERNATIONAL BALLROOM
- 4 GRAND BALLROOM
- 5 PALM BALLROOM
- 6 SABAL
- 7 LANAI
- 8 ARECA
- 9 VERANDA
- 10 OUTDOOR PAVILLION

1ST FLOOR



2ND FLOOR



#PEAK2018 APP AND SOCIAL MEDIA



#PEAK2018 There's an App for That!

Sponsored by Conrad N. Hilton Foundation

You can hold #PEAK2018 in your hand! 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:

Used the app last year?

Look for the PEAK Grantmaking Conference app on your device, and use your existing app credentials to log in. *Note: If your #PEAK2018 registration email is different from last year's, follow the new app user instructions below.*

New app user?

1. Search your app store for “PEAK Grantmaking 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 “Log In” 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 name. Click “Sign Up.”
4. A confirmation message will be sent to your email account. Click the link to verify your new app account.
5. Click the #PEAK2018 image.

GET SOCIAL WITH #PEAK2018!

Use social media to share what you're learning, who you're meeting, and the connections you're making at #PEAK2018. Look for the Twitter feed in the app!



#PEAK2018
twitter.com/peakgrantmaking



facebook.com/peakgrantmaking

P.S. Want to tweet about the specific conference session you're attending? Use #PEAK2018 and the customized hashtags listed in the session descriptions!

Please check the app for late changes and the most up-to-date conference 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/photo.
- 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. *Note that seating is unreserved. Arrive early for the best selection.*
- Filter the schedule by learning track, session block, and/or level to find the sessions of most interest to you.
- Use the Timeline 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 “PEAK Grantmaking” app (white icon) so you can quickly link to the #PEAK2018 conference community on Connect.

But Wait, There's More!

Questions about the app? Stop by the registration area, or send an email to Carolyn Sosnowski, PEAK Grantmaking e-learning and content manager, at carolyn@peakgrantmaking.org.

WELCOME TO ORLANDO

Welcome!

It is a pleasure to welcome you to our 13th annual conference, #PEAK2018, here in Orlando, Florida. For the next three days, we hope you will focus on making connections, learning new skills and ideas, and helping create the future of grantmaking!

We've worked hard to make every aspect of this conference as useful and informative as possible. You'll hear from experts and thought leaders about topics ranging from compliance and technology to emerging trends, and diversity, equity, and inclusion. You'll also have networking time to meet up with friends, introduce yourself to new people, and get the benefit of the expertise and knowledge that surrounds you.

And because we know you are ambitious and dedicated professionals, we have a few challenges for you while you're here:

- 1 Make it a point to meet someone new with whom you will maintain a connection when you return home. The friendships and professional connections made at our conference can offer a solution when you're stuck, a shoulder when you need to commiserate, or an insight when you don't know where else to turn.
- 2 Go to at least one session that's outside your comfort zone. Maybe you've been focused on compliance and could benefit from some skill building, or you're a technology whiz but want to increase your knowledge of DEI issues. However you choose, do something different.
- 3 Take pictures that represent this conference and share them with us on Twitter or Instagram using the hashtag #PEAK2018, or on the conference app timeline.

We want to know what you think about this conference, while you're thinking it. Near the registration desk you'll find a FEEDBACK box and some cards to share what you're thinking. Leave us one card or twenty, but let us know what you're finding at the conference that you love (or don't love).

Of course, this conference couldn't happen without the volunteers, speakers, and staff who have worked to create a wonderful experience for you—we thank them for their hard work! 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 Orlando and for being part of the network, which continues at the heart of the organization.

Again, welcome!



Michelle Greanias
Executive Director
PEAK Grantmaking



Aiko D. Bethea
Director of Diversity
and Inclusion
Fred Hutchinson Cancer
Research Institute



Dan Gaff
Grants Manager
May and Stanley Smith
Charitable Trust



Dan Schoenfeld
Director of Grants &
Impact Administration
John S. and James L.
Knight Foundation

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:

Sunday Happy Hour (Buy Your Own)
Newcomers Orientation & Welcome
Game Night
Morning Walks & Runs

Exhibit Hall
Speed Networking
Opening Reception

Regional Chapter Events
Volunteer Reception
Dine Arounds

PEAK Grantmaking Board of Directors

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Sunflower Foundation

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Cargill

Tim Robinson

The Lumina Foundation

Elizabeth Tabita

Secretary, The California Endowment

Rikard Treiber

Peter G. Peterson Foundation

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:

Aiko D. Bethea

Fred Hutchinson Cancer Research Institute

Mary Giraldo

United Arts of Central Florida

Stacey Smida

Cargill

Conference Sponsors**Conference Exhibitors****Marva Lewis McKnight & Shelby Richardson**

The Event Professionals

Speakers & Presenters

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

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Effective Practices Program
Manager

Carolyn J. Sosnowski

E-Learning & Content Manager

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, Proposal Reviewers, and Connections Committee members' employers for their support of this volunteer effort.

Conference Co-Chairs

Aiko D. Bethea

Fred Hutchinson
Cancer Research Institute

Dan Gaff

May and Stanley Smith
Charitable Trust

Dan Schoenfeld

John S. and James L. Knight
Foundation

Connections Committee

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Mary Girauro

United Arts of Central Florida

Jody M. Marshall

Meyer Memorial Trust

Erin Peterson

The Klarman Family Foundation

Amanda C. Vragovich

National Endowment for Democracy



Visit Our Exhibit Hall

The most active spot at PEAK Grantmaking's Annual Conference

LOCATION: International Ballroom—Center/South

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 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!
- Relax in our member lounge

Exhibitors



CONFERENCE SCHEDULE

SUNDAY, MARCH 18

9:00am – 5:00pm

Data Boot Camp Workshop

ROOM: Crystal Ballroom

[#PEAK2018](#) [#bigdata](#) [#databootcamp](#) [@meansandrew](#)

Andrew Means, Head, beyond.uptake

Additional Fees Apply

GM101 Workshop

Sponsored by *Campion Advocacy Fund*

ROOM: International Ballroom—North

[#PEAK2018](#) [#GM101](#) [@peakgrantmaking](#)

Megan Selland, Grants Manager, Wellspring Advisors, LLC

Elsa Chin, Vice President, Global Philanthropy, J.P. Morgan

Genise Singleton, Program Operations Manager, The Kresge Foundation

Additional Fees Apply

Responsive Philanthropy: A Framework for Advancing Racial Equity in Grantmaking

ROOM: Camellia/Dogwood

[#PEAK2018](#) [#DEI](#) [#equity](#) [#responsivephilanthropy](#)
[#grantmaking](#) [@ABFE](#)

Marcus F. Walton, VP/Chief Operating Officer, ABFE

Susan Taylor Batten, President and CEO, ABFE

Additional Fees Apply

2:00pm – 5:00pm

Conference Registration

LOCATION: Grand Ballroom Level

3:30pm – 5:00pm

Regional Chapter Officers Meeting

LOCATION: Azalea/Begonia

Regional chapter officers: come connect face-to-face with each other and PEAK Grantmaking staff to share best practices for effectively managing our regional chapters and volunteers and hear important updates. This meeting is for all regional chapter officers, including regional chapter chairs and vice chairs, as well as program, communications, and membership chairs.

5:30pm – 7:00pm

Happy Hour

LOCATION: Hotel Lobby Bar

[#PEAK2018](#) [#PEAKHappy](#)

Join other early arrivals for a drink in the hotel bar.
(Pay your own tab.)

6:00pm – 7:00pm

Newcomer Orientation and Welcome

LOCATION: Kahili/Lily

[#PEAK2018](#) [#PEAK1sttime](#)

8:00pm – 10:00pm

Game Night

Sponsored by *California Wellness Foundation*

LOCATION: Kahili/Lily

[#PEAK2018](#) [#PEAKgamenight](#) [@calwellness](#)

Join your peers for an evening of fun and games before the conference starts.



CONFERENCE SCHEDULE

MONDAY, MARCH 19

7:00am – 5:00pm

Conference Registration

LOCATION: Grand Ballroom Level

7:00am – 7:45am

Sunshine Wellness Walk & Run

Sponsored by California Wellness Foundation

LOCATION: Meet in Hotel Lobby

 #PEAK2018 #PEAKwellness @calwellness

7:30am – 9:00am

Breakfast and Networking

ROOM: Grand Ballroom Foyer

8:00am – 5:00pm

Exhibit Hall & Member Lounge Open

Sponsored by Fluxx

ROOM: International Ballroom—Center/South

 #PEAK2018 @fluxxlabs

9:00am – 10:30am

Opening Plenary

Sponsored by GHR Foundation

ROOM: Grand Ballroom—Salons 1-5

 #PEAK2018 #trustgrantmaking @peakgrantmaking @ghrfoundation

A Future We Can Trust

Trust-based philanthropy believes that funder-grantee relationships are stronger when they are built on the foundation of trust, rather than suspicion. Sometimes referred to as grantee-centric philanthropy, the concept of trust-based philanthropy is simple but powerful: empower the grant recipient to use its staff's time and talents on mission-focused work. More and more grantmakers are taking steps to embed trust into their approach. Some are driven by the belief that efforts to create social, political, and economic equity will be more successful if philanthropy embeds trust, dialogue, and relationship-building in its practices with grantees. Others are responding to the current political climate which requires fast learning and reflective action. Learn from two leaders in trust-based philanthropy, the Robert Sterling Clark Foundation and the Whitman Institute, about their approaches to trust-based philanthropy and join our call to action to embed more trust in your practices.

10:30am – 10:45am

Coffee Break

Sponsored by Foundant

LOCATION: Exhibit Hall

 #PEAK2018 @foundant

OPENING PLENARY SPEAKERS



Philip Li

*President & CEO,
Robert Sterling Clark
Foundation*

 @hipster

Phil previously held positions at The Century Foundation, the Brooklyn Community Foundation, Changing Our World, the Annie E. Casey Foundation, and the Coro New York Leadership Center. Prior to joining the nonprofit sector, he started his career at Merrill Lynch International and finished as a junk bond analyst with Moody's Investors Service. Phil currently serves as the board chair of Philanthropy New York and as a trustee of two family foundations. Phil has a B.A. from the University of Pennsylvania and an MBA from The Wharton School.



Pia Infante

*Co-Executive Director,
The Whitman Institute*

 @piavision

Pia draws on decades of multi-sector experience as an educator, facilitator, organizational development consultant, executive coach, non-profit manager, business owner, writer, and speaker to advocate for trust-based practice. Pia proudly serves as the Board Chair for the Center for Media Justice. She is on Faculty for the M.A. in Leadership Sustainability at the University of Vermont's Rubenstein School of Environment and Natural Resources as well as Thousand Currents Academy. Pia is an I.C.F. certified executive leadership coach, holds an M.A. from the New School for Social Research, and a B.A. from the University of California at Berkeley.



MODERATOR

Kerry Medek

*Director, Strategy and Learning,
GHR Foundation*

Kerry oversees and manages the systems, tools, and operations that drive high-quality, cost-effective and efficient grants management across the grant life-cycle, and the ability to capture, analyze, learn about and communicate grant results in the areas of global development, education, and health. Additionally, Kerry serves as special assistant to the CEO managing the work plans and activities of the board and governance committee. Kerry is active with the Minnesota Chapter of PEAK Grantmaking and serves as director of the board at the national level. She earned a bachelor's degree in chemistry from Austin Peay State University.

CONFERENCE SCHEDULE

MONDAY, MARCH 19 (CONTINUED)

10:45am – 12:00pm

Concurrent Block A

Beyond Good Intentions:
Self-Assessment for Equity
and Systems Change
ROOM: Narcissus/Orange Blossom

Careful—The Quest for Metrics
Will Strangle Community Em-
powerment and Stall Impact
ROOM: International Ballroom—
North

Corporate Approach to
Disaster Relief Response
ROOM: Salon 8

Creating Dashboards My
Colleagues Love to Use
ROOM: Salon 6

Creating Organizational
Change and Collaboration
ROOM: Fuschia/Gardenia

Impact Measurement Showcase
ROOM: Camellia/Dogwood

Investing in a Learning
Community to Build
Capacity for Impact
ROOM: Poinsettia/Quince

Walking the Talk—
Leading with Values
ROOM: Salon 7

12:00pm – 12:15pm

Networking Break

12:15pm – 1:15pm

Lunch and Networking

ROOM: Grand Ballroom—Salons 1-5

1:15pm – 1:30pm

Networking Break

1:30pm – 2:45pm

Concurrent Block B

Getting the Real Story from
Nonprofit Financials
ROOM: Salon 8

Grantmaking 2.0: Helmsley's
Story of Updating Its Grants
Management Processes
ROOM: Camellia/Dogwood

Managing Legal and
Compliance Issues at Every
Stage of the Grant Cycle
ROOM: Salon 7

Moving the Needle on Diversity
& Inclusion
ROOM: Narcissus/Orange Blossom

Not Your Regular "Save The
Whales" Campaign: Mapping
Changemaking Campaigns
ROOM: Hibiscus/Iris

The Role of Grants Managers
in Bridging Microcultures
ROOM: Kahili/Lily

Transparency Meets Reality:
Are You Over- or Under-
Protecting Your Data?
ROOM: Azalea/Begonia

PARTNER SPONSORED SESSION
Bromelkamp: Never Type
the Same Thing Twice
ROOM: Fuschia/Gardenia

PARTNER SPONSORED SESSION
CAF America: The Shrinking
Space for Civil Society: What
Grantmakers Need to Know
ROOM: Poinsettia/Quince

2:45pm – 3:00pm

Coffee Break

Sponsored by roundCorner

LOCATION: Exhibit Hall

 #PEAK2018 @roundCornerInc

3:00pm – 4:15pm

Concurrent Block C

Corporate Philanthropy in
Today's World of Expectations
ROOM: Poinsettia/Quince

DAFs: An Introduction to
a Lifetime and Beyond of
Philanthropy
ROOM: Salon 7

Data Sharing Tools—Stories
from Grantmakers
ROOM: Camellia/Dogwood

Embedding Equity Inside and
Out: How Grantmaking Process
and Change Go Hand-in-Hand
ROOM: Kahili/Lily

Life-Cycle of a Program
Related Investment (aka Impact
Investment): A Practical Guide
ROOM: Salon 8

Reigniting Your Career Spark
ROOM: Salon 6

Values Based Hiring: Dispelling
the Myth of Cultural Fit
ROOM: Hibiscus/Iris

PARTNER SPONSORED SESSION

Fluxx: Achieving Mission
Through Better Technology:
How to Change Grants
Management Systems Without
Changing Your Values
ROOM: Narcissus/Orange Blossom

PARTNER SPONSORED SESSION

INTL FCStone: Latest Trends
in Global Payments
ROOM: Fuschia/Gardenia

4:15pm – 4:30pm

Networking Break

4:30pm – 5:30pm

Speed Networking

Sponsored by California Wellness Foundation

ROOM: Narcissus/Orange Blossom

 #PEAK2018 @calwellness

5:30pm – 5:45pm

Networking Break

5:45pm – 7:15pm

Opening Reception

LOCATION: Poolside

 #PEAK2018 @peakgrantmaking

Celebrate another exceptional conference with all your colleagues at this opening reception. We'll have food and drinks, plus the fun photo booth that helps capture the special moments!

CONFERENCE SCHEDULE

TUESDAY, MARCH 20

7:30am – 8:15am

Sunshine Wellness Walk & Run

Sponsored by California Wellness Foundation

LOCATION: Meet in Hotel Lobby

 [#PEAK2018 @calwellness](#)

8:00am – 5:00pm

Conference Registration

LOCATION: Grand Ballroom Level

8:00am – 5:00pm

Exhibit Hall & Member Lounge Open

Sponsored by Fluxx

ROOM: International Ballroom—Center/South

 [#PEAK2018 @fluxxlabs](#)

8:00am – 9:15am

Breakfast and Networking

ROOM: Grand Ballroom Foyer

9:00am – 11:00am

Regional Chapter Events

ROOM: Various

Come together with other members from your region to hear about local news and events, meet your regional chapter officers, and learn about volunteer opportunities. Check the app and/or handout to find the room and specific meeting topics for your regional chapter.

9:45am – 11:00am

PARTNER SPONSORED SESSION

Foundant Grant Lifecycle Manager (GLM) User Group

Sponsored by Foundant

ROOM: Fuschia/Gardenia

 [#PEAK2018 @Foundant](#)

11:15am – 12:30pm

Concurrent Block D

990-PF Overview

ROOM: Salon 6

Diving Deep into Process

Improvement: GM Optimization, Part Two

ROOM: International Ballroom—North

Grantmaking: Examples from the Coast Guard

ROOM: Azalea/Begonia

How Blockchain Is Changing the Grantmaking and Philanthropic Sector Today

ROOM: Salon 7

Leading Change as a Grants Manager

ROOM: Narcissus/Orange Blossom

Managing Both the Art and Science of Results-Tracking

ROOM: Kahili/Lily

Maximizing Your Impact: Risk Management in Grantmaking

ROOM: Grand Ballroom—Salons 1-5

PEAK Grantmaking Principles and Practices

ROOM: Salon 8

Philanthro-Ethics—

How to Be an Ethical Funder

ROOM: Camellia/Dogwood

What Is Data Science and What Does a Project Look Like?

ROOM: Hibiscus/Iris

PARTNER SPONSORED SESSION

Blackbaud: Leveraging the Tech Ecosystem of Good to Accomplish Your Goals

ROOM: Fuschia/Gardenia

PARTNER SPONSORED SESSION

SmartSimple: How Accessible Is Your Grantmaking?

ROOM: Poinsettia/Quince



CONFERENCE SCHEDULE

TUESDAY, MARCH 20

(CONTINUED)

12:30pm – 12:45pm
Networking Break

12:45pm – 1:45pm
Lunch Plenary

ROOM: Grand Ballroom—Salons 1-5

 **#PEAK2018** **#philanthropy**
#trumpadministration **#grantmaking**

Philanthropy During a Trump Administration: For Better or for Worse?

Given the overwhelming response to and interest in last year's conference roundtable "Grantmaking in the Trump Era," this plenary will advance the conversation about the impact of the current administration on the field of philanthropy. Plenary speakers will address the effects on marginalized and at-risk communities, racial and gender equity, policy changes affecting philanthropic giving, and the long-term impact on federal spending for social programs that affect the people our grantees support. This discussion will address how philanthropy can best strategize during this administration and beyond by leveraging human capital and lessons learned to maintain mission-driven work in a challenging time.

LUNCH PLENARY SPEAKERS



C'Ardiss "CC" Gardner Gleser
*Program Officer,
Satterberg Foundation*

C'Ardiss is a program officer at the Satterberg Foundation. Prior to joining the nonprofit sector, she worked in software as an engineer and project manager for GE Healthcare (formerly PHAMIS, Inc.). She is involved in her community, both locally and nationally. She currently serves on the boards of the Andrus Family Fund, Charlotte Martin Foundation, Philanthropy Northwest, and The Bush School. C'Ardiss holds a Bachelor's degree in African American Studies from Yale University and an M.Ed. in Education Administration from Seattle University.



Marcus McGrew
*Director of Program
Operations and Information
Management,
The Kresge Foundation*

Marcus is director of program operations and information management at The Kresge Foundation, where he is responsible for creating and enabling processes that facilitate effective grantmaking and social investing. He previously served as the Wayne County Community College District associate vice chancellor for administration and finance. Marcus earned a bachelor of business administration degree in finance from the University of South Alabama and a master of business administration in integrative management from the Eli Broad Graduate School of Management at Michigan State University. He serves as vice chair of the board of directors of ABFE and is a member of the Council on Foundation's Career Pathways 2017 Cohort.



Hadar Susskind
*Senior Vice President of
Government Relations,
Council on Foundations*

Hadar is senior vice president of government relations at the Council on Foundations and has more than two decades of experience in public policy, philanthropy, and social movements. Hadar served on the White House Office of Faith Based and Neighborhood Initiatives Task Force on the Environment,

as well as the Board of Directors of the Coalition on Human Needs, Progressive Caucus Center, and Ameinu, and the Public Policy Committee of Independent Sector and the Leadership Council on Nonprofit VOTE. He is a graduate of the University of Maryland and holds the rank of Sergeant First Class in the Israel Defense Forces.



Edgar Villanueva
*Vice President of
Programs and Advocacy,
Schott Foundation*
 **@villanuevaedgar**

Edgar is a nationally-recognized expert on social justice philanthropy. He currently serves as chair of the board directors of Native Americans in Philanthropy and is a board member of Andrus Family Fund. Edgar is an instructor with The Grantmaking School at the Johnson Center at Grand Valley State University and currently serves as vice president of programs and advocacy at the Schott Foundation for Public Education. Edgar, previously held leadership roles at Kate B. Reynolds Charitable Trust and at the Marguerite Casey Foundation. He is the author of the forthcoming book, *Decolonizing Wealth*.



MODERATOR
Aiko D. Bethea
*Director of Diversity and
Inclusion, Fred Hutchinson
Cancer Research Institute*

Aiko is director of diversity & inclusion for Fred Hutchinson Cancer Research Institute. She is also the principal of Bethea Consulting Group, a consulting practice focused on coaching leaders and organizations in removing barriers to inclusion. Her practice integrates operations, leadership coaching, and education strategies to yield measurable outcomes.

CONFERENCE SCHEDULE

TUESDAY, MARCH 20 (CONTINUED)

1:45pm – 2:00pm

Networking Break

2:00pm – 3:30pm

SHORT TALKS

2:00pm – 2:25pm Round 1
2:25pm – 2:40pm Round 1 Q&A
2:50pm – 3:15pm Round 2
3:15pm – 3:30pm Round 2 Q&A

GMS Launch Readiness
ROOM: Hibiscus/Iris

Hear What Is Not Said: A Look at Nonverbal Communication
ROOM: Salon 8

How to Play the Game When the Rules Aren't Clear
ROOM: Salon 6

Implementing a Strategic Plan to Accelerate Outcomes: An Organizational Case Study
ROOM: Narcissus/Orange Blossom

Power to the People: Participatory Grantmaking
ROOM: Salon 7

The Power of Your Story
ROOM: Kahili/Lily

A TripAdvisor for Funder Feedback
ROOM: International Ballroom—North

Your Geographic Impact—Splitting Dollars and Cents
ROOM: Camellia/Dogwood

OR CHOOSE

SESSION

2:00 pm – 3:30 pm

PARTNER SPONSORED SESSION

GivingData: Grantee Relationship Management (GRM) to Support Impactful Grantmaking: Visions, Needs, Solutions
ROOM: Poinsettia/Quince

PARTNER SPONSORED SESSION

roundCorner: Grantee Inclusion and the Role of Technology
ROOM: Fuschia/Gardenia

3:45pm – 5:15pm

Roundtable Discussions

ROOM: Various; check the app and/or handout for location information


These facilitated discussions are conversations with your peers and provide a space to discuss grants management topics.

Topics #PEAK2018

Best Practices for Continuous Testing

 #bestpractices
#systemstesting

Building an Innovation Culture in Philanthropy

 #innovationculture
#philanthropy

The Changing Face of Philanthropy

 #philanthropy #change

Corporate Philanthropy

 #corpphilanthropy

Donor Advised Funding

 #donoradvisedfunding #DAFs

Effective Funder Collaboration in Disaster Grantmaking

 #disasterGM

Employee Engagement/Employee Giving Programs

 #employeeengiving
#employeeengagement

Fiscal Intermediaries

 #fiscalintermeds

Grant Agreement Language and Mission Statements

 #grantlanguage

Grants Management During a Trump Era

 #GMandtrump

The Great Debate: Spend Down vs. Perpetuity

 #spenddown

Implementing a New Grants Management System

 #newGMS

Incorporating DEI in Grantmaking

 #GMDEI #DEIgrantmaking

Public Charities

 #publiccharities

Reigniting Your Career Spark

 #careerspark

Salesforce Users

 #salesforce

Small Foundations

 #smallfoundations

Smart Signaling with Shared Frameworks: How SDGs Help All Foundations

 #SDGs

Where Does Grantmaking Fit in Movements Like #MeToo

 #grantmaking #metoo

3:30pm – 4:15pm

Coffee and Dessert Break

Sponsored by GivingData

LOCATION: Exhibit Hall

 @givingdata

5:45pm – 6:45pm

Volunteer Reception

LOCATION: Poolside

By Invitation Only.

6:45pm – 8:45pm

Dine Arouds

LOCATION: Meet in Hotel Lobby

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

CONFERENCE SCHEDULE

WEDNESDAY, MARCH 21

7:00am – 7:45am

Sunshine Wellness Walk & Run

Sponsored by California Wellness Foundation

LOCATION: Meet in Hotel Lobby

 [#PEAK2018](#) @calwellness

7:30am – 9:00am

Breakfast & Networking

ROOM: Grand Ballroom Foyer

8:00am – 12:00pm

Exhibit Hall & Member Lounge Open

Sponsored by Fluxx

ROOM: International Ballroom—Center/South

 [#PEAK2018](#) @fluxxlabs

9:00am – 10:15am

Concurrent Block E

2020 Census: Why Your Foundation Should Care About a Fair and Accurate Census
ROOM: Hibiscus/Iris

Employee Engagement: What Is the Impact?
ROOM: Poinsettia/Quince

The Evolution of Grants Management and You
ROOM: Salon 6

Health Equity Assessment and Strategy Development
ROOM: Camellia/Dogwood

Improv Comedy for Grants Managers (Seriously!)—A Fresh Take
ROOM: Azalea/Begonia

Making Your Grants Knowledge #OpenForGood
ROOM: Salon 8

A Practical Guide to Developing Measurable Outcomes
ROOM: Salon 7

Revisiting Reporting
ROOM: Kahili/Lily

PARTNER SPONSORED SESSION
SurveyMonkey: Putting Grantseekers First: How to Improve Access to Grants and Reduce Application Hurdles
ROOM: Narcissus/Orange Blossom

PARTNER SPONSORED SESSION
WizeHive: Alexa, What Is AI's Role in the Future of Grants Management?
ROOM: Fuschia/Gardenia

10:15am – 10:30am

Networking Break

10:30am – 12:00pm

Closing Plenary

Sponsored by Edyth Bush Charitable Foundation

ROOM: Grand Ballroom—Salons 1-5

 [#PEAK2018](#) [#DEI](#) [#demographics](#) [#philanthropy](#)

Insight, Impact, and Equity: A Call for Equitable Practices in Philanthropy

What would a philanthropic sector look like informed by robust data on the communities foundations are serving and who is serving them? With the strong trends toward data driven investments, many foundations have no clear understanding of who they are serving and who they are leaving out. How can grantmakers strengthen their work by collecting and using critical information on the characteristics of staff, leaders, and stakeholders?

Join us for a closing plenary session that is both a report on the current state of demographic data in philanthropy, as well as a call to action around individual and organizational responsibility to base philanthropic efforts on data we know to be key to impact, inclusion, and equity. Our featured speaker is Kelly Brown, former executive director of the D5 Coalition and author of a forthcoming PEAK Grantmaking report on demographic data collection by grantmakers.

Participants will:

- Learn what demographic data grantmakers are collecting and how this data helps improve impact and equitable practices
- Understand how funders can build systems and process to move their grantmaking towards equity and inclusion

CLOSING PLENARY SPEAKERS



Kelly Brown

*Principal Consultant,
Viewpoint Consulting*

Kelly is the former executive director of the D5 Coalition, a five-year effort to increase philanthropy's diversity, equity, and inclusiveness. She previously served as director of programs and evaluation at Marguerite Casey Foundation and as grants director at the Vanguard Public Foundation. She has an M.B.A from the Haas School of Business at UC Berkeley, a BA in Sociology from UC Santa Barbara and was a Sloan Foundation Fellow at Princeton University's Woodrow Wilson School. She is currently pursuing a PhD at the University of Chicago, researching the intersection between leadership, organizational networks and contemporary social movements.



Satonya Fair

*Director of Grants
Management,
Annie E. Casey
Foundation*

Satonya is director of grants management at the Annie E. Casey Foundation, where she oversees the administration of more than \$100M in grants and contracts annually. Before joining the Annie E. Casey Foundation, Satonya supported Citi's Global Community Development with responsibilities that spanned corporate and foundation giving, employee engagement and volunteerism, program development and outcome measurement. She earned her JD from the University of Cincinnati and a BA in Psychology and Political Science from Miami University (Ohio). Satonya graduated from the Council on Foundation's Career Pathways executive leadership program in April 2013.

Learning Tracks

Compliance

Master the complex and constantly evolving financial and legal issues impacting grantmaking.

Diversity, Equity, & Inclusion

Learn how to address disparities in your grantmaking practices to bring more fairness and justice into philanthropy.

Effective Practices

Streamline and improve your grantmaking practices, maximizing the resources devoted to achieving your mission.

Knowledge Management

Expand your ability to gather, organize, analyze, and share data, information, and the resulting knowledge to increase your organization's philanthropic impact.

Leadership

Hone your professional and personal skills to be more effective in leading and managing effective practices for your organization.

Outcomes/Evaluation

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

Technology

Integrate technology into your grantmaking to be more efficient and effective.

BLOCK A

Monday, March 19
10:30am – 12:00pm

Beyond Good Intentions: Self-Assessment for Equity and Systems Change

LEARNING TRACK: Diversity, Equity, and Inclusion, Knowledge Management, Outcomes/Evaluation
LEVEL: General
ROOM: Narcissus/Orange Blossom

 [#PEAK2018](#) [#equityassessment](#)
[#DEIsystemschange](#)

Lisa Ranghelli, Senior Director of Assessment and Special Projects, National Committee for Responsive Philanthropy

Jessica Bearman, Principal, Bearman Consulting

Over the course of several years, the National Committee for Responsive Philanthropy (NCRP) has explored the issue of feedback to grantmakers through its Philamplify project. The initiative has assessed a dozen of the nation's largest foundations through comprehensive, nuanced examinations of each funder's goals, strategies, and outcomes. Three hallmarks of Philamplify that, together, make it unique relative to other assessment tools are the application of a social justice and equity lens; the collection and analysis of anonymous feedback from grantees, philanthropic peers, and other stakeholders; and the public release of the findings and recommendations. Drawing from the wealth of data and lessons learned from Philamplify, NCRP developed a comprehensive toolkit, incorporating expert insights from a committee of leaders in learning and evaluation in the philanthropic sector. Set to be released in March 2018, the toolkit helps funders self-reflect and share how they build, share, and wield power. The free suite of resources will be valuable for audiences across the sector, including philanthropic consultants, foundation knowledge and evaluation officers, and grant managers. This session will explore what Philamplify has learned about how grant processes can support or hinder equity, and ways that foundation staff can seek feedback to course-correct.

Participants will:

- Explore elements of the newly-released toolkit in depth, including a case study and discussion questions
- Consider with peers how they and their organization would shift practice in light of the findings
- Be invited to use the toolkit in their organizations and have their experience profiled as a best practice in the sector

Careful—The Quest for Metrics Will Strangle Community Empowerment and Stall Impact

LEARNING TRACK: Diversity, Equity, and Inclusion
LEVEL: Intermediate
ROOM: International Ballroom—North

 [#PEAK2018](#) [#DEI](#) [#empowerment](#)

Robbin Thornton Hudson, Community Programming Manager, United Black Fund of Greater Cleveland

The heavy lifting of empowering communities is done on shoestring grants of \$10,000 or less. The United Black Fund of Greater Cleveland (UBF) funds nonprofits who operate at the deepest roots of community catalyzing transformation and community empowerment. When foundations are metric-centered rather than empowerment-centered, they intrinsically create barriers to diverse, equitable, and inclusive grantmaking. RFPs, for example, are designed to capture information that some nonprofits can't demonstrate, by metrics alone, well enough to earn grants. Often nonprofits operating at the deepest levels of community don't have the "right" board members, audited financials, and evaluation reports to earn grants.

Participants will:

- Learn about UBF's processes for co-creating strategy with partner nonprofits, inviting them to collaborate and co-produce efforts in order to maximize impact
- Understand how collective efforts are better competition for limited resources
- Explore how providing support helps increase operational capacity and organizational effectiveness, positioning nonprofits to approach and secure funding from larger foundations and corporations

Corporate Approach to Disaster Relief Response

LEARNING TRACK: Effective Practices
LEVEL: General
ROOM: Salon 8

 [#PEAK2018](#) [#corporategrants](#)
[#disasterGM](#)

Anna Hurt, Assistant Director of Disasters and Grants, Center for Disaster Philanthropy

Emily Blankenship, Vice President, Global Philanthropy, JPMorgan Chase & Co.

Larry Olness, Senior Vice President, Strategic Enterprises, Heart of Florida United Way

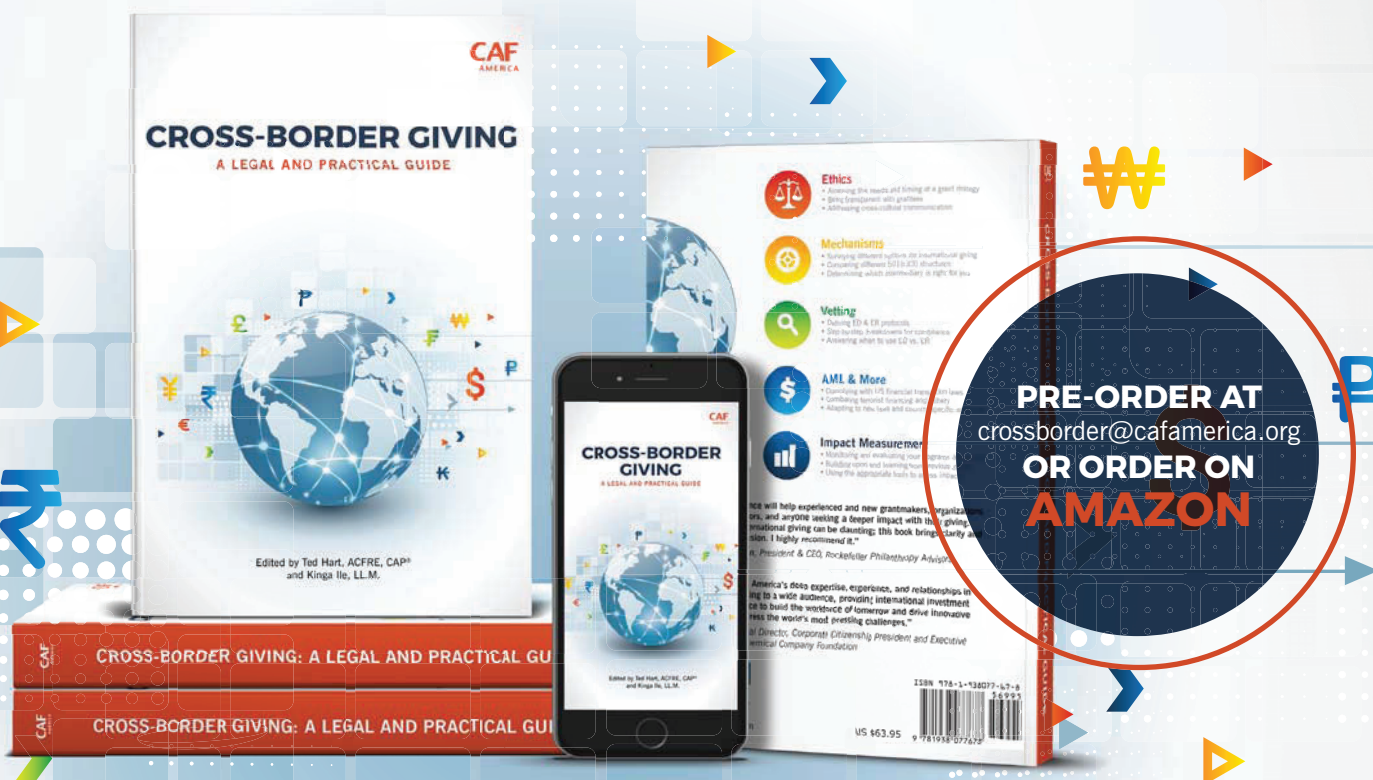
Stacey Smida, Grants Manager, Cargill

Responding to natural disasters is oftentimes reactive and done "in the moment" to meet devastating immediate needs. Participants will hear from corporate grantmakers and community partners about how to ensure response efforts are

COMING SOON

CROSS-BORDER GIVING

A LEGAL AND PRACTICAL GUIDE



ABOUT CAF AMERICA

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- CONDUCT EXTENSIVE DUE DILIGENCE ON RECIPIENT ORGANIZATIONS
- ADMINISTER RFP PROCESSES
- MONITOR ALIGNMENT WITH ESTABLISHED REPORTING FRAMEWORKS (SDGs AND MORE)

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SESSION DESCRIPTIONS

BLOCK A (CONTINUED)

effective—by meeting short- and long-term needs while taking into account community and employee needs, as well as corporate reputation.

Participants will:

- Gain insight from recent successful disaster-relief collaborations
- Learn how to engage and support employees in times of natural disaster
- Hear about best practices for setting up an employee assistance fund
- Understand how employees can be engaged through giving and volunteering
- Receive information on the latest natural disaster philanthropy resources available

Creating Dashboards My Colleagues Love to Use

LEARNING TRACK: Effective Practices, Knowledge Management, Leadership, Technology
LEVEL: General
ROOM: Salon 6

 [#PEAK2018](#) [#dashboards](#) [#grantmaking](#) [#outcomes](#)

Ursula D. Stewart, Senior Grants Associate and System Administrator, New York State Health Foundation

From the CEO on down, well-crafted dashboards have enabled the presenter's colleagues to work smarter and more efficiently, be more knowledgeable, and make better decisions. What leads to the creation of meaningful dashboards? Using her organization's dashboards as an example, presenter Ursula Stewart will focus on the goals for creating dashboards, assessing the needs of each targeted audience, and the process of determining which components to include in each dashboard, including the significance of each component to the overall mission of the dashboard and the value the dashboard information has to the overall strategies of the organization.

Participants will:

- Learn what to consider when creating dashboards
- Review analysis of dashboard interpretations
- See examples of how analysis of dashboard metrics can lead to changes in strategies and policies

Impact Measurement Showcase

LEARNING TRACK: Knowledge Management, Outcomes/Evaluation
LEVEL: Intermediate
ROOM: Camellia/Dogwood

 [#PEAK2018](#) [#impactshowcase](#)

Brad Cameron-Cooper, Communications & Knowledge Management Associate, The Winthrop Rockefeller Foundation

Dan Gaff, Grants Manager, May and Stanley Smith Charitable Trust and Stanley Smith Horticultural Trust

Tonya Newstetter, Associate Director, Grants Operations, Salesforce.org

Erica Novotny, Director, Grants Management, Arcus Foundation

Mercedes Plendl, Strategy & Learning Associate, GHR Foundation

Patrick Taylor, Grants Manager, Zellerbach Family Foundation

This session will highlight how several foundations are measuring outcomes and impact, with a focus on the mechanisms and processes they use to collect, analyze, and share data. The presenters, representing a range of grantmakers and approaches, will give participants a brief nuts-and-bolts view of several different methods of measuring impact, with the hope that at least one of those methods will be relevant and applicable to participants' organizations.

Participants will:

- Learn different ways foundations are defining impact
- Understand at least three different ways foundations are measuring impact
- Identify a model for measuring impact that could be relevant and useful at their own foundation.

Implementing New Technology to Create Organizational Change and Collaboration

LEARNING TRACK: Effective Practices, Technology
LEVEL: General
ROOM: Fuschia/Gardenia

 [#PEAK2018](#) [#orgchange](#) [#orgcollabs](#)

Nora Mitnick, Grant Operations Manager, Russell Sage Foundation

Tierney Smith, Philanthropy Advisor, GrantBook

This session presents a case study on creating organization change by working together to update processes, procedures, and systems—making the organization both more collaborative

and effective. The case study follows the Russell Sage Foundation's experience of selecting and implementing a new grants management system and updating organization processes, including creating digital files, conducting an IT audit, and implementing new policies.

Participants will:

- Learn how to foster collaboration through the creation of a staff task force
- Understand how change management and updated processes are linked to collaboration and effectiveness
- Hear about lessons learned from selecting and implementing a new grants management system, and how to prepare for these projects

Investing in a Learning Community to Build Capacity for Impact

LEARNING TRACK: Effective Practices, Leadership
LEVEL: Advanced
ROOM: Poinsettia/Quince

 [#PEAK2018](#) [#impactcapacity](#) [#learningcmnty](#)

Christina Ellis, Program Director, Advancing a Healthier Wisconsin Endowment

Tim Meister, Program Officer, Advancing a Healthier Wisconsin Endowment, Medical College of Wisconsin

Session participants will learn how the Advancing a Healthier Wisconsin (AHW) Endowment transitioned from being a grantmaker to being a changemaker. As part of this shift in focus, AHW launched an 8-year, \$20M investment in 10 community coalitions across the state of Wisconsin to improve behavioral health outcomes.

An important aspect of the initiative is an investment in a full year of funded learning and planning and the development of a learning community to build the capacity of grantees. The learning community featured three primary objectives—gain knowledge, develop partnerships, and create effective implementation plans.

The presenter will share valuable tips on what to replicate—and what to avoid—and discuss methods for authentic community engagement.

Participants will:

- Learn the benefits of this approach
- Understand how to structure a learning community to build the capacity of funded partners
- Learn how to support community coalitions and engage a network of active partners interested in attaining statewide impact

SESSION DESCRIPTIONS

Walking the Talk—Leading with Values

LEARNING TRACK: Effective Practices

LEVEL: General

ROOM: Salon 7

 [#PEAK2018](#) [#valuesbasedgrants](#)
[#walkthetalk](#) [@peakgrantmaking](#)

Aimée Bruederle, Grants Officer, Global Development & Population, The William and Flora Hewlett Foundation

Nikki Powell, Communications and Practices Director, PEAK Grantmaking

Over the past year PEAK Grantmaking has spread the word across the country that now more than ever, funders are thinking about how to “walk the talk” — how to identify their institutional values and embed these values into their grantmaking practices. We’ve had frank and robust conversations with a majority of PEAK Regional Chapters and are grateful to them for not only approaching this topic with an open mind but also helping us learn from their own experiences. In addition to sharing what we learned from our members, in this session we will review some of the key findings from our research, provide concrete skills to identify ways to align grantmaking practice with values within your own authority, and initiate conversations with colleagues and organizational leaders to make an impact across the organization. We also will feature a case study from the Hewlett Foundation, which went through an institutional values review and recently codified how the values translate into day-to-day grant practices. You’ll hear about the process they went through and how they think about walking the talk.

Participants will:

- Learn about the critical importance of articulating organizational values and putting values into practice
- Understand how your organization is doing in aligning practices with values and learn how to enact positive changes within your areas of authority
- Discover skills and increase capacity to enlist colleagues and leadership in collaborative efforts to articulate and “live” organizational values
- Engage in discussions with your session colleagues about steps you can take to help your organization to “walk the talk”

BLOCK B

Monday, March 19

1:30pm – 2:45pm

Getting the Real Story from Nonprofit Financials

LEARNING TRACK: Compliance, Effective Practices

LEVEL: General

ROOM: Salon 8

 [#PEAK2018](#) [#nonprofit](#) [#financials](#)

Hilda Polanco, Founder & CEO, FMA

Financials are just one piece of the story when considering whether or not to make a grant. Coupled with open conversation, financials can provide insights into a nonprofit’s financial situation, sustainability, and overall organizational capacity. Learn how to look at nonprofit financials beyond the numbers and with an eye toward trends in the field.

Participants will:

- Learn how to recognize signs of a financially healthy nonprofit, with a focus on an organization’s unique circumstances
- Discuss how to engage nonprofits in conversations about their financial situation and true needs
- Identify financial red flags that warrant further conversation and understand how to formulate appropriate questions based on those red flags

Grantmaking 2.0: Helmsley’s Story of Updating Its Grants Management Processes

LEARNING TRACK: Compliance, Effective Practices, Technology

LEVEL: Intermediate

ROOM: Camellia/Dogwood

 [#PEAK2018](#) [#grantsmgt](#) [#grantsprocess](#)
[@helmsleytrust](#)

Anneka Preston, Grants Manager, The Leona M. and Harry B. Helmsley Charitable Trust

Adam Sanders, Grants Manager, The Leona M. and Harry B. Helmsley Charitable Trust

Jeannine Corey, Senior Consultant and Partner, Philanthropy.io

Rebecca Van Sickle, Managing Partner, 1892 consulting

Experienced grantmakers interested in learning from other grantmakers about how they revised and updated their grants management practices will find this session helpful. Using the example of The Leona M. and Harry B. Helmsley Charitable Trust’s

efforts to update their practices, the presenters will share lessons learned and best practices for making your own practice updates.

Participants will:

- Learn how to prepare for a grants management database system transition
- Understand how to engage departments across your organization
- Hear best practices for process redesign

Managing Legal and Compliance Issues at Every Stage of the Grant Cycle

LEARNING TRACK: Compliance

LEVEL: Intermediate

ROOM: Salon 7

 [#PEAK2018](#) [#compliance](#)
[#grantcyclelegal](#)

Carly Leinheiser, Attorney, Robinson & Cole

In this session, we’ll examine the unique laws and regulations governing grantmaking by private foundations, as well as specific legal and compliance issues at each stage in the grantmaking process. We’ll cover specific strategies for investigating applicants and verifying an applicant’s tax-exempt status, and explore how to structure grants to comply with private foundation excise tax rules and specific requirements for making expenditure responsibility grants and other complex grants or disbursements.

Other session topics include the grant agreement and its role in establishing expectations and a shared understanding between the foundation and the grantee, key provisions normally found in grant agreements, and simple letter agreements versus more complex multi-page agreements. We’ll also cover grantee reporting responsibilities and the foundation’s obligation to monitor the grantee’s expenditures of grant funds, plus a few concrete steps you can take to help your foundation manage its legal and compliance obligations.

Participants will:

- Gain a better understanding of the laws and regulations governing private foundations and the legal and compliance obligations that apply at each stage of the grant cycle
- Understand how to comply with taxable expenditure rules by making grants only for permitted charitable purposes and exercising expenditure responsibility when required
- Understand common grant agreement provisions and learn to review and improve draft agreements by identifying ambiguous, overly complex, or difficult language

SESSION DESCRIPTIONS

BLOCK B (CONTINUED)

Moving the Needle on Diversity & Inclusion

LEARNING TRACK: Diversity, Equity, and Inclusion
LEVEL: General
ROOM: Narcissus/Orange Blossom

 [#PEAK2018](#) [#DEI](#) [#movingtheneedle](#)

Flora Maria Garcia, President & CEO, United Arts of Central Florida

Deborah A. Clements, Government & Community Relations Manager, Duke Energy

Sharon Arroyo, Director-Florida Large Account Management, Duke Energy

Margaret Spontak, Stakeholder Philanthropy Manager, Duke Energy Foundation

Given the distinct disconnect regarding diversity and inclusion among the programs, audiences, and boards of Central Florida's cultural groups, for the past two years United Arts of Central Florida has focused its efforts—supported by a generous grant from Duke Energy—to address the disconnect through education, grantmaking practices, targeted funding, programming, and publicity. United Arts has seen positive results from these efforts over the past few years, including a notably diverse audience for the “Arts for All Day” showcase featuring more than fifty funded groups and 6,000 attendees—27% of whom had never attended a local cultural event. In this session, you'll hear more about United Arts' strategies and activities, and learn from their successes.

Not Your Regular “Save the Whales” Campaign: Mapping Changemaking Campaigns

LEARNING TRACK: Effective Practices, Knowledge Management
LEVEL: Intermediate
ROOM: Hibiscus/Iris

 [#PEAK2018](#) [#grantscampaign](#)

C. Davis Parchment, Manager, Knowledge Services, Foundation Center

Not only have philanthropists come up short on ocean conservation in recent years (just 1 percent of philanthropic funding since 2009 has gone to ocean projects), we also suffer from a lack of coordination. In 2017, Foundation Center and a group of partners launched FundingtheOcean.org to address this issue. The site is an open-access information hub that describes what ocean conservation work is being done, who is doing it, where it is happening, and who is funding it. Join us for an engaging panel discussion with

grants managers from several key foundations to learn about how they are leveraging the power of this resource to inform their work a year into the project. Like the oceans themselves, all of our work is connected. And now is the time to renew our commitment to collaborate.

Participants will:

- Learn how to elevate the role of the grants manager to data consumer and knowledge producer within their organizations
- Understand ways to demonstrate how grants data can inform strategy
- Learn why they should promote collaboration in the ocean conservation space.

The Role of Grants Managers in Bridging Microcultures

LEARNING TRACK: Effective Practices, Leadership
LEVEL: Intermediate
ROOM: Kahili/Lily

 [#PEAK2018](#) [#grantsmgmt](#) [#microcultures](#)

Kerry Medek, Director, Grants Management and Learning, GHR Foundation

Amy Shields, Program Manager, Grantmakers for Effective Organizations (GEO)

The role of grants managers has shifted from focusing on due diligence and recordkeeping to providing expertise on process, learning, and relationships. In other words, grants managers play a cross-functional role in shaping organizational culture. Within every organization, however, are microcultures that influence how people do their work and which may help or hurt the greater organizational culture. By understanding the microcultures in their organizations, grants managers can better facilitate solutions that best serve the whole organization.

In this session, participants will learn what microcultures are and identify some of the microcultures that exist in their own organizations. Participants will think through how these microcultures do or do not contribute to their organization's overall effectiveness before brainstorming ways to bridge microcultures so their organizations can best support their grantees.

Participants will:

- Understand what microcultures are and why they matter to organizational effectiveness
- Learn how to identify microcultures in their own organization and determine their impact on productive organizational culture
- Brainstorm with their peers about what they've done to bridge and support positive microcultures

Transparency Meets Reality: Are You Over- or Under-Protecting Your Data?

LEARNING TRACK: Effective Practices
LEVEL: General
ROOM: Azalea/Begonia

 [#PEAK2018](#) [#datatransparency](#)

Laia Griño, Director, Data Discovery, Foundation Center

Sharing information about your foundation's grantmaking can be a powerful way to amplify your organization's impact. Yet, depending on the context, being open can also pose risks. Long a concern of human rights funders, the issue of data protection has been gaining prominence among funders working in other fields, from the environment to immigration to gun control. Join us in this working session to explore what you should consider when sharing your grants data, as well as your options for being open even in challenging circumstances.

Participants will:

- Determine how to decide how and when to share their grants data
- Learn how others have approached challenging decisions around data sharing
- Understand the spectrum of options available for sharing

PARTNER SPONSORED SESSION

Never Type the Same Thing Twice

Sponsored by Bromelkamp

LEARNING TRACKS: Technology
LEVEL: General
ROOM: Fuschia/Gardenia

 [#PEAK2018](#) [#techintegration](#) [#GMtech](#) [@bromelkampco](#)

Henry A. Bromelkamp, President, Bromelkamp Company LLC

Why is software integration essential to your success? From databases to due diligence tools (GuideStar, CRA, etc.) to online banking and payment systems, you probably use an assortment of software solutions to accomplish your day-to-day work. While these technologies are meant to make your job easier, every time you re-type something there's opportunity for error—not to mention the inefficiency of dual data entry, the need to reconcile systems, and manual aggregation for reporting. Make your life easier by choosing software that works well together.

Technology companies tout their ability to integrate with other products or services, but “integration” can mean different things and may not be smooth or painless. Our industry has progressed from importing and exporting to APIs, bridges, and web services. Learn how to take these functions into consideration when creating your technology plan by asking yourself these important questions: What integration features should I look for when considering new

SESSION DESCRIPTIONS

solutions? What factors should I consider when deciding to integrate programs or data sources? Do I have fail-safe plans if integration is compromised? Is there ever a time when integration is a bad idea? Join Henry A. Bromelkamp to learn the answers to all of these questions and more!

Participants will:

- Learn different integration methods
- Understand how integrations can save time for grantmakers
- Hear factors to consider when determining whether to integrate

PARTNER SPONSORED SESSION

The Shrinking Space for Civil Society: What Grantmakers Need to Know

Sponsored by CAF America

LEARNING TRACKS: Compliance

LEVEL: General

ROOM: Poinsettia/Quince

 [#PEAK2018](#) [#civilsociety](#) @CAFAmerica

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

Jessie Krafft, Vice President of Donor Advised and Grant Services, CAF America

Since September 11, 2001, civil societies across the world have come under increased pressure from their governments. Initially seen as potential conduits for terrorist funding, nonprofits and other civil society organizations have continued to suffer from new legislation and regulations that limit the scope of their work, funding, and capacity. This has a direct impact on any funder who operates or funds internationally. This presentation will provide attendees with an updated understanding of what the shrinking space for civil society entails, how grantmakers can operate within these new legal confines by using the 3 Rs of international grantmaking, explore specific countries where this trend has manifested, and ask questions about the future of civil society.

Participants will:

- Gain a broad understanding of what “the shrinking space for civil society” entails and how it can impact international giving
- Learn about regulatory environments that impose more strict requirements on foreign funding limiting the ability for civil society to operate independently from the government
- Explore specific country cases such as China, Mexico, India, Russia, and Bangladesh, and how grantmakers can work within these challenging legal landscapes
- Understand how the 3 Rs of international grantmaking—risk management, reputation protection, and regulatory compliance—are all vital to this topic
- Engage in a discussion about what this trend means and how it may continue to manifest in the future

BLOCK C

Monday, March 19
3:00pm – 4:15pm

Corporate Philanthropy in Today's World of Expectations

LEARNING TRACKS: Effective Practices

LEVEL: General

ROOM: Poinsettia/Quince

 [#PEAK2018](#) [#givingstrategies](#) [#grantsmgmt](#)

Annie Rhodes, Director, Foundation Strategy, Blackbaud

Heidi Jedlicka Halvarson, Grant Administrator, Medtronic

Stacey Smida, Grants Manager, Cargill

What does corporate philanthropy look like in today's ever-changing marketplace? This session will provide insight on various corporate philanthropy focus areas. Presenters will discuss how you can build your corporate portfolio of partnerships to move the needle on specific SDGs, the synergies between your corporate and foundation giving and your corporate mission as a whole, going beyond communicating the feel good stories to telling the story of impact, and staying compliant while managing many competing philanthropic priorities.

Participants will:

- Learn how corporate philanthropy has evolved due to the necessity of reporting on impact and commitments to SDGs
- Gain a clear understanding of the various forms of corporate philanthropy and how to collaborate with other departments
- Understand how to ensure there are checks and balances in place throughout the grant process

DAFs: An Introduction to a Lifetime and Beyond of Philanthropy

LEARNING TRACK: Knowledge Management

LEVEL: General

ROOM: Salon 7

 [#PEAK2018](#) [#DAFs](#) [#donoradvisedfunds](#) [#philanthropy](#)

Barrett Coker Krise, CAP®, Senior Philanthropic Officer, Community Foundation for Greater Atlanta

Jessica Halpern, Grants Manager, Vanguard Charitable

In this session, panelists will discuss what a donor advised fund is, the immediate short term gains of a DAF for the individual, and the potential gains (short- and long-term) for the institution that

manages the DAF. Panelists will explore the three models of DAFs—a community foundation, national, and issue-focused.

Participants will:

- Get clarity on what DAFs are
- Hear about the advantages and pitfalls of the three DAF models
- Understand the importance of helping both philanthropic and non-philanthropic individuals become more sophisticated in their grantmaking

Data Sharing Tools—Stories from Grantmakers

LEARNING TRACK: Effective Practices, Technology

LEVEL: General

ROOM: Camellia/Dogwood

 [#PEAK2018](#) [#datasharing](#) [#grantsmgmt](#)

Poney Carpenter, Project Manager, Simplify Initiative

In this panel discussion, you will hear fellow grantmakers talk about their experiences with some of the data sharing tools being promoted by TAG's Simplify Initiative, including GuideStar for Grant Applications (G4G), Foundation Center's Electronic Reporting program, Techsoup's NGO-Source, and the DigitalImpact.io toolkit. Panelists will discuss the implementation processes, how to use the tools, how the tools have benefited the foundations and their grantees, and the challenges they've encountered. Attendees will be encouraged to ask questions and share their own stories, as well.

Participants will:

- Learn how grantmakers are benefiting from the use of data sharing tools
- Find out what it takes to implement data sharing tools
- Explore the challenges of implementing and adopting the tools

Embedding Equity Inside and Out: How Grantmaking Process and Change Go Hand-in-Hand

LEARNING TRACK: Diversity, Equity, and Inclusion, Effective Practices, Knowledge Management

LEVEL: General

ROOM: Kahili/Lily

 [#PEAK2018](#) [#knowledgegmt](#) [#DEI](#) [#equity](#) [#valuenotevaluation](#)

Angela K. Fruscante, PhD, Principal, Knowledge Designs to Change, LLC

Equity isn't always on everyone's radar, and yet it needs to be more than in our individual hearts. Even if it's not the focus or experience of our

SESSION DESCRIPTIONS

BLOCK C (CONTINUED)

organizations, how can we effectively embed equity into the grant process? Grants managers sit at the core of knowledge practice and are in a key role to help foundations ask the right questions and hear and see information in ways that matter for impact and social change. In this session, participants will discuss the various aspects of grants management and explore a knowledge framework for embedding equity into change grantmaking. Using a tool to understand both internal and external engagement will lead to actions that move grant processes, systems, and analysis toward deeper equity understanding and practice.

Participants will:

- Explore how grant information can become meaningful change data
- Navigate issues of who gets to ask the questions and make sense of the answers
- Target knowledge leverage points in ongoing foundation activity
- Discuss how to “speak up” to power while learning with communities not traditionally heard
- Identify ways to roll safely when we stumble... because we all do

Life-Cycle of a Program Related Investment (aka Impact Investment): A Practical Guide

LEARNING TRACK: Effective Practices

LEVEL: General

ROOM: Salon 8

 [#PEAK2018](#) [#PRIs](#) [#impactinvesting](#)

Erik Josephson, Senior Grants and Contracts Administrator, Capital Impact Partners

Marion Goldfinger, Senior Grants Manager for Impact Investments, MacArthur Foundation

Elsa Chin, Vice President, Global Philanthropy, J.P. Morgan

Mark Greer, Associate, Program Operations and Information Management, The Kresge Foundation

This session will provide an overview of what it takes to offer a program related investment (PRI), what the process looks like for a foundation, what a recipient does, and the work that takes place for both the foundation and the recipient. Presenters will also cover typical interest amounts, payments terms, what a recipient does with the funds, and what the foundation does with the funds once they are paid back.

Participants will:

- Learn the ins and outs of a PRI using real-world examples
- Understand the benefits—to both the foundation and the recipient—of offering PRIs

Reigniting Your Career Spark

LEARNING TRACK: Leadership

LEVEL: General

ROOM: Salon 6

 [#PEAK2018](#) [#grantsmgmt](#) [#careerspark](#)

Jackie Hanselmann Sergi, Leadership and Career Empowerment Coach & Founder, Radical Spark Coaching

As we mature as leaders, we often shift from cultivating our own career growth to focusing on developing our teams and getting caught up in the “doing” of work. This session will focus on reigniting the career spark for leaders, who will be inspired to take a personal career inventory of who they are now as leaders and how they want to grow. The presenter will also provide tips and tricks to support that career growth.

Participants will:

- Leave with a checklist and instructions for taking a career inventory
- Learn networking tips
- Find out how to embrace career growth from a place of strength, not scarcity

Values Based Hiring: Dispelling the Myth of Cultural Fit

LEARNING TRACK: Diversity, Equity, and Inclusion, Leadership

LEVEL: Intermediate

ROOM: Hibiscus/Iris

 [#PEAK2018](#) [#valuesbasedhiring](#) [#DEI](#) [#mythofculturefit](#)

Joe Iarocci, Founder, Cairnway

Patrick Solomon, Certified Sherpa Executive Coach, Sherpa Leadership Institute

In this session, we'll discuss how the undefined notion of “cultural fit” in the hiring process can create and facilitate unconscious bias. The result can be a workforce that lacks many kinds of diversity. Instead, organizations and hiring managers should define a set of values and seek candidates who share those values. This session will highlight the differences between the notions of cultural fit (often, shared interests) vs. shared values, and help participants develop interview questions and strategies to help determine whether candidates have these shared values.

Participants will:

- Understand the pitfalls of hiring for cultural fit, and why shared values can enhance diversity in the hiring process
- Learn how to define the values of their department when thinking about a hiring process
- Be able to develop interview questions that will help determine whether a candidate shares the same values as your department and/or organization

PARTNER SPONSORED SESSION

Achieving Mission Through Better Technology: How to Change Grants Management Systems Without Changing Your Values

Sponsored by Fluxx

LEARNING TRACK: Technology

LEVEL: General

ROOM: Narcissus/Orange Blossom

 [#PEAK2018](#) [#GMSystems](#) [@fluxxlabs](#)

John J. Mohr, Chief Information Officer, MacArthur Foundation

Patrick Taylor, Grants Manager, Zellerbach Family Foundation

Mark Walker, Knowledge Management and Technology Officer, Jessie Ball duPont Fund

Whether you're a grants manager, program officer, or IT pro, you are the heart of your foundation's grantmaking. Your work underscores the values and mission of the foundation. But where the grants process was once managed on paper or within a spreadsheet, today's grantmakers are responsible for a myriad of complex activities resulting in grants worth nearly \$60 billion each year. The potential for meaningful social impact is staggering.

Just as your entire team is essential to the foundation's success, grants management software is at the center of everything you do. But, unfortunately, systems that once performed admirably have not kept pace with the growing demands of modern grantmakers. Workflows are more complex, collaboration among peers is ever more critical, and capturing data to measure impact and inform decision making is essential. To achieve your mission, you need technology that aligns with your organization's core values and ways of working. But how do you ensure technology aligns with values such as collaboration, transparency, and efficiency? And how do you make the transition and implementation of new technology as painless as possible?

In this engaging panel discussion, we'll talk with three foundation leaders who led their organizations' transitions to new grants management systems—from both commercial vendors and homegrown solutions—and discuss how they ensured success by taking an open, collaborative, and user-centric approach. Our panelists will share their journeys and the lessons they learned when they took the (let's face it—scary) leap to new grants management technology.

Participants will:

- Learn how these leaders worked cross-functionally to choose a GMS that optimizes workflows, streamlines funding, and strengthens collaboration
- Understand why their former systems weren't serving the needs of their many users, and how new systems were justified
- Hear how panelists' GMSs and related technologies align with and support their foundations' core values

SESSION DESCRIPTIONS

PARTNER SPONSORED SESSION

Latest Trends in Global Payments

Sponsored by INTL FCStone

LEARNING TRACK: Technology

LEVEL: General

ROOM: Fuschia/Gardenia

 [#PEAK2018](#) [#globalpayments](#)
[#blockchain](#) [@INTLFCStone](#)

Byard Bridge, Senior Vice President, Global Payments, INTL FCStone

Sue-Ellen Speight, Senior Vice President, Global Payments, INTL FCStone

What are the latest trends in global payments, and what strategies are foundations and grantees using to reduce the cost of international payments—and make every dollar go further?

Participants will:

- Understand global payment trends
- Discover tools that simplify international funding
- Hear the latest thoughts about how blockchain and new technologies may (and may not) revolutionize the way international funding works

PARTNER SPONSORED SESSION

Tuesday, March 20
9:45am – 11:00am

PARTNER SPONSORED SESSION

Foundant Grant Lifecycle Manager (GLM) User Group

Sponsored by Foundant

LEARNING TRACK: Technology

LEVEL: General

ROOM: Fuschia/Gardenia

 [#PEAK2018](#) [#foundantGLM](#) [@Foundant](#)

Sammie Holzwarth, Product Manager, Foundant
Weston Paul, Client Success Manager, Foundant

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

Those who are not yet users of GLM will see how Foundant interacts with our clients and hear directly from our users about how they use the system.

Participants will:

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

BLOCK D

Tuesday, March 20
11:15am – 12:30pm

990-PF Overview

LEARNING TRACK: Compliance, Effective Practices, Leadership

LEVEL: Intermediate

ROOM: Salon 6

 [#PEAK2018](#) [#990pf](#) [#grantsmgt](#)

Tom Blaney, Partner, PKF O'Connor Davies

Chris Peterman, Partner, PKF O'Connor Davies

This session will cover the history of the 990-PF; key items to focus on when reviewing the form; common mistakes made when preparing the it; and managing returned grants, expenditure responsibility, and multi-year grants.

Participants will:

- Learn the key items to focus on when reviewing or compiling the 990-PF
- Understand several common mistakes to avoid when preparing the form
- Hear best practices for accounting for unusual grants—specifically expenditure responsibility, returned, and multi-year grants

Diving Deep into Process Improvement: GM Optimization, Part Two

LEARNING TRACK: Compliance, Effective Practices, Leadership, Technology

LEVEL: Intermediate

ROOM: International Ballroom—North

 [#PEAK2018](#) [#GMoptimize](#)

Danette Peters, Principal Consultant, Onyx Consulting, LLC

This session is designed to be part two of “Optimizing your GM Process” from the 2017 PEAK Grantmaking annual conference. It's a deep dive into the mechanics of process improvement, integrating best practices, and will discuss the significance of timing and gaining buy-in.

Participants will:

- Discover tools used during process improvement, including system integration
- Learn how to elevate the importance of process review and optimization
- Hear tips and tricks for planning and managing a system optimization, and lessons learned from field experts

Grantmaking: Examples from the Coast Guard

LEARNING TRACK: Compliance, Diversity, Equity, and Inclusion, Effective Practices, Leadership

LEVEL: General

ROOM: Azalea/Begonia

 [#PEAK2018](#) [#coastguard](#) [#grantmaking](#)
[@USCG](#)

Pavlo Oborski, Grants Management Branch Chief, Boating Safety Division, United States Coast Guard

Gain insight on the federal grantmaking process used by the United States Coast Guard. The Coast Guard funds states and nonprofit organizations on recreational boating safety efforts. The relationship the Coast Guard maintains with grantees is unique—grantees are treated as partners when it comes to the mission of reducing recreational boating property damage, injuries, and deaths. The grant cycles of the pre-award process (including the Coast Guard priorities of the year, the solicitation, and application review), the award phase (negotiations, compliance, technical assistance), and the closeout phase will be discussed.

Participants will:

- Gain an understanding of the federal grant process as conducted by the Coast Guard
- Determine whether this process can benefit their grantmaking organizations

How Blockchain Is Changing the Grantmaking and Philanthropic Sector Today

LEARNING TRACK: Technology

LEVEL: General

ROOM: Salon 7

 [#PEAK2018](#) [#blockchain](#) [#grantmaking](#)
[#philanthropy](#)

Joshua Sugar, CEO, Re-Solved

Malcolm Klotz, Founder & CTO, Re-Solved

Sam Caplan, Sr. Director Insights and Engagement, Fluxx

Blockchain, technology that connects digital assets, is revolutionizing many areas and is making a significant impact in the grantmaking sector. Blockchain solves many challenges including payments, tracking, and reporting. Attendees will learn the basics about blockchain, cryptocurrencies, and smart contracts, as well as existing use cases. What may have sounded like science fiction a year ago is now in the market. Join this informative and engaging session to learn the essentials and find out how you can participate in this technological revolution.

Participants will:

- Understand how blockchain solutions can address philanthropic sector challenges
- Hear blockchain examples and use cases
- Learn what the future may hold

SESSION DESCRIPTIONS

BLOCK D (CONTINUED)

Leading Change as a Grants Manager

LEARNING TRACK: Leadership

LEVEL: General

ROOM: Narcissus/Orange Blossom

 [#PEAK2018](#) [#GMleadingchange](#)

Emily Wexler, Senior Manager of Programs, Grantmakers for Effective Organizations (GEO)

Susan Clark, Grants Manager, Gaylord and Dorothy Donnelley Foundation

Genise Singleton, Program Operations Manager, The Kresge Foundation

As PEAK Grantmaking describes in *Successful Structures: Rethinking the Role of Grants Management*, many foundations are breaking down silos to better connect strategy, learning, and impact. As a result, the role of grants managers is shifting along with organizational structures and culture. Grants managers are increasingly leading change efforts and pushing their organizations toward greater efficiency and effectiveness. However, change is hard. Change sometimes includes ambiguity and resistance, and often the most difficult part of managing change is leading others through the process, especially in situations where one has influence but not authority. Being an effective change leader requires self-awareness and strong communication and relationship-building skills. While there isn't a magic formula for change leadership, there are frameworks and tips that can make the process easier.

In this session, you'll hear an overview of a few change frameworks (including Iceberg Model and the Kubler-Ross Change Curve). Two current participants in our Change Leaders in Philanthropy Fellowship program (a 10-month cohort program dedicated to leading change) will share how they are applying these frameworks and what they've learned so far.

Participants will:

- Learn about common elements of change leadership and various frameworks that illustrate change
- Hear two case studies about how grants managers are applying these frameworks in their work and what they've learned so far
- Explore change frameworks and how they may result in stronger change leadership

Managing Both the Art and Science of Results-Tracking

LEARNING TRACK: Knowledge Management, Outcomes/Evaluation, Technology

LEVEL: Intermediate

ROOM: Kahili/Lily

 [#PEAK2018](#) [#artscienceresults](#)

Kerry Medek, Director of Grants Management and Learning, GHR Foundation

Mandy Chapman Semple, Director of Learning and Evaluation, Houston Endowment

Roberto Cremonini, Partner, GivingData

Knowledge management can be difficult and time consuming, and managing grants across teams, departments, and work styles can be frustrating. Tracking the progress and results of grants and major initiatives can be challenging. What's it all for? Impact! We're all trying to assess progress towards impact and managing the qualitative and quantitative data needed to get there. Any set of processes and tools requires the art and science of working with numbers, stories, and people to get at the heart of high-quality grants management.

This session explores one foundation's journey to tackle these challenges through an internal assessment of grants management and program processes, tools, and technology to streamline and integrate how we capture, analyze, and report on results. While there is no one right way to do this, you will learn steps we took to assess our own strengths, weaknesses, and gaps; what we did to align how we work with our guiding principles, culture, vision, and mission; and tools and processes that support a grant portfolio review process that helps us talk about the results of our grantmaking and make data-informed decisions. The approach we took, and the tools and technology we use, are scalable to all types of foundations, both large and small.

Participants will:

- Learn a practical approach to managing knowledge and data that achieves objectives across grants management, programs, and grantee partners, with a particular focus on a regular cycle of grant portfolio review to inform and refine grantmaking
- Understand how to conduct a gap analysis on internal processes, tools, and technology to assess the effectiveness and quality of one's approach to managing grants across a lifecycle and different departments and teams
- Learn about change management processes that can support project managers when they're implementing new approaches and/or technology

Maximizing Your Impact: Risk Management in Grantmaking

LEARNING TRACK: Effective Practices

LEVEL: General

ROOM: Grand Ballroom—Salons 1-5

 [#PEAK2018](#) [#riskmngmt](#) [#maximpact](#)

Maya Winkelstein, Executive Director, Open Road Alliance

Funders are often described—and describe themselves—as being able to take risks that neither the private sector nor the government can or will take. However, no industry standard currently exists for defining, assessing, and managing risk in philanthropy. Few grantmakers assess risk during the application process and even fewer have processes in place to manage risks to impact after a grant is made. Without being aware of the parameters of risk, one can't adequately plan or manage risk—let alone take risk. This gap materially contributes to sub-optimal planning, implementation, and transparent and/or trusting interactions between funders and grantees. While managing risk is a shared responsibility, funders are in a unique position to foster an environment that allows nonprofits to be more transparent about possible risks to impact and more trusting of funders as partners for impact. In this working session, Open Road Alliance will introduce the topic of risk management in philanthropy as well as a toolkit it helped produce in 2016 that can be adopted or adapted for considering risk practices more fully in grantmaking work.

Participants will:

- Hear about the latest research and case studies about the state of risk in philanthropy
- Learn best practices for risk management in grantmaking
- Explore risk-adjusted grantee-funder communication

PEAK Grantmaking Principles and Practices

LEARNING TRACK: Effective Practices

LEVEL: Advanced

ROOM: Salon 8

 [#PEAK2018](#) [#peakprinciples](#) [#peakpractices](#) [@peakgrantmaking](#)

Nikki Powell, Communications and Practices Director, PEAK Grantmaking

Elizabeth Myrick, Consultant, Elizabeth Myrick Consulting, LLC

The oft-cited adage “If you've seen one foundation, you've seen one foundation” has persisted throughout the sector despite the unnecessary hardships it may be perpetuating for grantseekers and grantmakers alike. With this in mind, PEAK Grantmaking is developing a strong set of practices where consistency and

SESSION DESCRIPTIONS

continual improvement can benefit the field. On this journey, we've identified a set of principles that grantmakers can adopt to strengthen their commitment to good grantmaking. Join us as we introduce these principles to the field and engage in a discussion on their viability and keys to adoption.

Participants will:

- Learn about the principles of PEAK Grantmaking
- Understand the strong case behind each of the principles
- Contribute to further development of ideal practices within each principle

Philanthro-Ethics: How to Be an Ethical Funder

LEARNING TRACK: Compliance, Effective Practices, Leadership

LEVEL: General

ROOM: Camellia/Dogwood

 [#PEAK2018](#) [#philanthroethics](#)

Richard Marker, Faculty Co-Director, Funder Executive Education Program, University of Pennsylvania Center for High Impact Philanthropy
Kimberly Canfield, Grants Manager, Peter G. Peterson Foundation

This series of real life case scenarios examines the intersection of law, ethics, and best practices. The scenarios cover everything from grantmaker practice to grantmaking behavior to relationships with grantees. Not everyone knows the laws, but that's the easy part. Ethics are challenging when there are competing claims. The presenter will provide tools for making responsible decisions

Participants will:

- Understand the differences between law, ethics, and best practices—and how to implement or develop operating policies reflecting that understanding
- Develop an enhanced awareness of “conscious use of self” in relation to grantees, especially regarding the implicit power imbalance of all funder relationships
- Learn a methodology to reinforce equity practices among grantees

What Is Data Science and What Does a Project Look Like?

LEARNING TRACK: Compliance, Effective Practices, Knowledge Management, Leadership, Outcomes/Evaluation, Technology

LEVEL: General

ROOM: Hibiscus/Iris

 [#PEAK2018](#) [#datascience](#) [#gmdata](#)

Ania Wiczorel, Partner, Bowery Analytics

What does a data science project look like? Explore the current business analytics landscape and get past the jargon into actual business cases. Data science is the newest trend in the world of business, but what does it really mean? You will learn, through a case study, what the project lifecycle looks like from an organization's perspective. The session will cover the specific steps of a typical data science project, the outputs you will see, and the jargon that's used.

Participants will:

- See a high-level overview of data science and its brief history
- Learn the specific steps of a data project lifecycle
- Get tools and understand the skills critical to a data science project

PARTNER SPONSORED SESSION How Accessible Is Your Grantmaking?

Sponsored by SmartSimple

LEARNING TRACK: Diversity, Equity, and Inclusion, Technology

LEVEL: General

ROOM: Poinsettia/Quince

 [#PEAK2018](#) [#DEI](#) [#equity](#) [#technology](#)
[@SmartSimpleSaaS](#)

Mark Bridger, User Interface Lead & Training Officer, SmartSimple

With nearly 1 in 5 Americans living with a disability, grantmakers must consider how they provide fair, equitable access to their funding programs for their communities. Access to technology in a way that respects the dignity and independence of all people is a right, not a privilege, and it is the law. So what do grantmakers need to know?

Participants will:

- Learn the key components of Web Content Accessibility Guidelines (WCAG) and understand the physical challenges that these guidelines are rooted in
- Hear a case study about providing the best experience for users with disabilities
- Gain best practice information about how organizations provide equal access and opportunity to people with disabilities

PARTNER SPONSORED SESSION:

Leveraging the Tech Ecosystem of Good to Accomplish Your Goals

Sponsored by Blackbaud

LEARNING TRACK: Technology

LEVEL: General

ROOM: Fuschia/Gardenia

 [#PEAK2018](#) [#techstrategy](#) [@blackbaud](#)

Annie Rhodes, Director of Foundation Strategy, Blackbaud

It's essential that your organization have a well-thought-out technology strategy in place to achieve your mission and have greater impact. Settling on a software solution that solves one problem for a single department without thinking through the entire organization's technology needs and ecosystem can lead to more problems than it solves, including: a fatal lack of buy-in from staff and management; technology needs that go unaddressed; duplication of effort; and lack of systems integration. Learn how forward-thinking organizations look for holistic, connected solutions that can help them advance their mission and yield a better-than-average return on investment.

Participants will:

- Understand how to create and implement a technology strategy that includes a holistic view of the pros and cons of the software platform, buy-in from key stakeholders, and a focus on ROI as well as costs
- Learn about five types of software that are useful for foundations and grantmaking charities
- Be able to plan a successful implementation that sets up their organization for long-term success

SESSION DESCRIPTIONS

SHORT TALKS AND SESSIONS

Tuesday, March 20
2:00pm – 3:30pm

You will have the option to attend either two short talks or one Partner Sponsored Session. Each of the 25-minute short talks will be presented twice and will be followed by a 15-minute Q&A.

SHORT TALKS

Round 1: 2:00pm – 2:25pm • Round 1 Q&A: 2:25pm – 2:40pm

Round 2: 2:50pm – 3:15pm • Round 2 Q&A: 3:15pm – 3:30pm

GMS Launch Readiness

LEARNING TRACK: Effective Practices, Technology

LEVEL: Intermediate

ROOM: Hibiscus/Iris

 [#PEAK2018](#) [#GMSlaunchreadiness](#)
[#GMSsystems](#)

Crystal Mathews, Foundation Project Director,
Sputnik Moment

Moving to a new grants management system can be scary! In this session, learn how concrete preparation steps, and some fun, can turn a daunting project into a very exciting one. Session topics include: organizing the project team and selecting “super users,” identifying key decision makers, learning how to document existing business processes, determining how and when to complete data review and clean up, reviewing and editing current email/mail merge templates, creating an internal communications plan for user adoption, and, if the new system is going to impact them, creating a grantee communications plan.

Participants will:

- Learn the key elements needed to prepare for a GMS launch
- Understand approximate time frames to complete the preparation process
- Learn how to make the process fun

The Head (Data) and Heart (People) of Inclusion Work

LEARNING TRACK: Leadership

LEVEL: General

ROOM: Kahili/Lily

 [#PEAK2018](#) [#headandheart](#) [#DEI](#)

Denise Barreto, Managing Partner, Relationships Matter Now, LLC

We need both our heads and our hearts to do inclusive philanthropy work. And the connection of the head (data) and the heart (people and their stories) is often missed, especially in turbulent times. This quick talk will challenge

you on how to connect the head and heart to the underrepresentation that is rampant in philanthropy today and equip you to tell a more inclusive story about yourself and your organization as a remedy.

Participants will:


- Understand how their personal story is relevant to their institution's story
- Reflect on and gain practical tips for telling their story more concisely
- Hear techniques for closing the underrepresentation gap in their organization

Hear What Is Not Said: A Look at Nonverbal Communication

LEARNING TRACK: Leadership

LEVEL: General

ROOM: Salon 8

 [#PEAK2018](#) [#nonverbalcomms](#)
[#seeithearit](#)

LaShonda Barnett, Manager—Grants & Research,
Dallas Women's Foundation

Katrin Blucker Ludwig, Community Grants
Manager, Methodist Healthcare Ministries of South
Texas

Your communications with grantees include an invisible element with significant impact. Learn more about how nonverbal communication affects grantor/grantee interaction dynamics, and increase your awareness of the key dynamics at play and how to effectively and purposefully communicate through your expressions and posture. This short talk will provide an opportunity for lively discussion and provide simple modifications each of us can make in our body language. Participants' activity will include imitating some of the behaviors discussed. You will leave this session with a better understanding of nonverbal signals and how they may be

perceived, and able to apply that knowledge in your communications with peers and grantees.

Participants will:

- Learn different aspects of nonverbal communication (eyes, mouth, posture, etc.)
- Share experiences of the power dynamic between grantor and grantee—and how nonverbal signals may impact interactions
- Practice nonverbal skills (handshakes, entering a room, power pose, etc.)

How to Play the Game When the Rules Aren't Clear

LEARNING TRACK: Compliance, Diversity, Equity, and Inclusion, Effective Practices, Leadership

LEVEL: Intermediate

ROOM: Salon 6

 [#PEAK2018](#) [#international](#)
[#grantmaking](#)

Martha Lackritz-Peltier, Senior Counsel,
TechSoup's NGOsource

The complexities of international grantmaking are not always well understood, and often leave funders in a state of uncertainty in terms of how to address some of the “between the lines” situations the grantmakers often encounter. This session will focus on the ambiguities international funders may face, and offers suggestions about how to tackle these challenges head-on.

Participants will:

- Learn what some of these unclear compliance-related situations in international grantmaking look like
- Discover tools and resources to handle these situations in an ethical manner
- Understand how they can bring a critical eye to their own work



SESSION DESCRIPTIONS

SHORT TALKS (CONTINUED)

Implementing a Strategic Plan to Accelerate Outcomes: An Organizational Case-Study

LEARNING TRACK: Compliance, Effective Practices, Outcomes/Evaluations
LEVEL: Intermediate
ROOM: Narcissus/Orange Blossom

 [#PEAK2018](#) [#stratplanoutcomes](#)

Gabriel Thompson, Director of Portfolio Operations and Performance, California Institute for Regenerative Medicine

Jennifer Mielnicki, Grants Management Specialist, California Institute for Regenerative Medicine

Your organization has undertaken a strategic planning process that allows the team to rethink how it conducts its business. Out of that process, an actionable five-year roadmap has been put into place with limited time to show a meaningful impact on the field. How can grants management influence and participate in this plan, its effective implementation, and ongoing monitoring? This session will focus on how the California Institute Regenerative Medicine – tasked with operationalizing a strategic plan to accelerate scientific outcomes—leveraged its grantmaking processes to align grantee funding with scientific outcomes, eliminated non-value adding steps, streamlined reporting, developed pre-award processes to fast-track the time to contract execution, and created a system to measure it all. Learn from our experience transitioning from a traditionally siloed grants management function to an integral part of the entire team. Yes—a government agency can be more efficient!

Participants will:

- Learn how to use milestone-based funding and contract terms to provide simplicity and clarity to the funding process while developing a critical tool to measure portfolio performance
- Explore streamlining institutional processes and operating procedures to allow for flexibility and responsiveness without sacrificing oversight or reducing restrictions
- Understand how to evaluate existing organizational structures and implement new tools to measure and monitor portfolio progress

Power to the People: Participatory Grantmaking

LEARNING TRACK: Diversity, Equity, and Inclusion, Effective Practices, Leadership
LEVEL: General
ROOM: Salon 7

 [#PEAK2018](#) [#participatory](#) [#grantmaking](#)

Jen Bokoff, Director of Stakeholder Engagement, Foundation Center

Arlene Wilson-Grant, Grants Manager, Disability Rights Fund


GrantCraft, a service of Foundation Center, has researched participatory grantmaking for the past year, and will publish a guide in summer 2018. This short talk will feature highlights from the research and some voices from the field.

Participants will:

- Learn what participatory grantmaking is (and is not)
- Understand what makes it work (and not work)
- Understand its benefits and challenges

A TripAdvisor for Funder Feedback

LEARNING TRACK: Effective Practices
LEVEL: General
ROOM: Azalea/Begonia

 [#PEAK2018](#) [@Grant_Advisor](#)

Michelle Greanias, Executive Director, PEAK Grantmaking

Pia Infante, Co-Executive Director, The Whitman Institute

Hearing what grantseekers think about funders' practices and their experience working with you is a critical component of effective grantmaking. In the past, funders have needed to initiate feedback through surveys, conversations, and third-party evaluators. Now, a collaboration of funders, nonprofits, and others interested in improving philanthropy are exploring a new approach—GrantAdvisor, which launched in California and Minnesota in 2017 with a goal of eventually reaching the entire country. Hear from the creators and funders of this project about

how this work came about and its potential to improve grantee/funder relations. Come ready to share your questions and feedback with the GrantAdvisor team.

Participants will:

- Explore the importance of funder feedback on improving their grantmaking
- Understand this new field-wide initiative and how it may impact their organization

Your Geographic Impact—Splitting Dollars and Cents

LEARNING TRACK: Effective Practices, Knowledge Management, Outcomes/Evaluation, Technology
LEVEL: General
ROOM: Camellia/Dogwood

 [#PEAK2018](#) [#geosplit](#) [#grantsmgt](#)

Nicole Austin-Thomas, Assistant Vice President, Grants Associate, Citi Foundation

Janet Nabila, Assistant Vice President, Grants Associate, Citi Foundation

Do you know exactly how much of your grant dollars served a particular country, state, or city? Building a geographic split is the process of creating a report on the geographic allocation of your grant investments. In this session, find out how to follow the dollars to the geographic level using grantee responses and Excel formulas, and how to present this information to stakeholders.

Participants will:

- Understand the benefits of being more granular with geographic reporting
- Learn how to create and use geographic split reports
- Discover ways to communicate their findings to stakeholders



SESSION DESCRIPTIONS

OR CHOOSE A SESSION:

SESSIONS 2:00pm – 3:30pm

PARTNER SPONSORED SESSION


Grantee Inclusion and the Role of Technology

Sponsored by roundCorner

LEARNING TRACK: Technology

LEVEL: Intermediate

ROOM: Fuschia/Gardenia

 [#PEAK2018 #techtools](#)
[#granteeinclusion @roundCorner](#)

Nicolle Bennett, Senior Consultant, roundCorner
Kerri Hurley, Director of Grants Management, Barr Foundation

Molly Matheson Gruen, Program Operations Director, Bush Foundation

Adrian Bordone, Vice President, Strategic Partnerships, GuideStar USA

According to recent research, grantmakers who are more connected to their grantees and communities are more likely to build trust, and ultimately provide support that has a greater impact. As inclusive strategies become more common practice, it is important for foundations to understand the variety of technological tools that may support their efforts in the future, and for technology solution providers to support foundations and their grantees as they build these relationships. Join this session to explore various technological tools that foundations can use to support innovative strategies around grantee inclusion.

Participants will:

- Learn ways to engage with grantees during the grantmaking lifecycle
- Discover technology tools that can support inclusive strategies
- Understand the pros and cons of using technology in grantee engagement

PARTNER SPONSORED SESSION

Grantee Relationship Management (GRM) to Support Impactful Grantmaking: Visions, Needs, Solutions

Sponsored by GivingData

LEARNING TRACK: Technology

LEVEL: General

ROOM: Poinsettia/Quince

 [#PEAK2018 #granteerelmtgt @givingdata](#)

Alfred Gracombe, President & Founding Partner, GivingData

Roberto Cremonini, Senior Partner, GivingData

Establishing and nurturing good relationships is at the core of impactful grantmaking. Gone are the days of impersonal, form-based applications and reviews. Effective grantmaking has become more collaborative, and the tools that funders and grantees use must be able to support interactions and capture the social capital that grants managers, program officers, and grant seekers so deliberately develop over time. In this session, we will review highlights from recent publications on funder-grantee relationships, engage the audience in a conversation about GRM visions and needs that GivingData users produced at a recent convening, and show the suite of GRM tools that GivingData is building in partnership with its clients.

Participants will:

- Hear definitions of GRM and what is at the core of good funder-grantee relationships
- Explore how other funders (including participants) are thinking about GRM and what they are doing to address GRM needs in their organizations
- See the tools that GivingData is building to support GRM in its grantmaking platform

BLOCK E

Wednesday, March 21
9:00am – 10:15am

2020 Census: Why Your Foundation Should Care About a Fair and Accurate Census

LEARNING TRACK: Knowledge Management

LEVEL: General

ROOM: Hibiscus/Iris

 [#PEAK2018 #2020census](#)

Keely Monroe, Democracy Program Manager, Funders' Committee for Civic Participation (FCCP)

The decennial census controls billions of dollars in federal funding and determines political representation at the state and federal levels. Decade after decade, the same groups are undercounted on the census—low-income people, people of color, those experiencing housing instability, immigrants, and other oppressed communities—meaning that federal funding and political power become more entrenched in the most privileged communities. The lack of sufficient funding, a growing climate of fear in immigrant communities, and congressional attacks on federal data collection could undermine the next census, especially in historically undercounted communities.

The presenter will educate funders about why the 2020 Census should be a priority for them, regardless of their issue-focus area, and provide them with a case for incorporating the census as part of their grantmaking and their work. Funders will leave the session with an understanding of how the census intersects with a range of democracy, social justice, and community issues, as well as resources on how to integrate the 2020 Census into their programming.

Participants will:

- Have a clear understanding of why they should care about a fair and accurate census
- Leave the session with a summary of key upcoming census milestones and a timeline for 2020 Census advocacy and outreach
- Understand the multiple ways that they can promote, influence, participate, and invest in the census
- Get an overview of the coordinated strategies and practical structures and tools available at the national, state, and regional levels for funders to immediately plug in to
- Develop a basic (and scalable) work plan for how their foundation could get involved with the 2020 Census in their city/state/region or at the federal level

SESSION DESCRIPTIONS

Employee Engagement: What Is the Impact?

LEARNING TRACK: Effective Practices

LEVEL: General

ROOM: Poinsettia/Quince

 [#PEAK2018](#) [#employeeengiving](#)
[#employeeengagement](#)

Kim Armstrong, Community Programs Manager, Mutual of Omaha

Stacey Smida, Grants Manager, Cargill

Sunny Virella, Community Development Specialist, Microsoft

A proven fact: employees that are engaged and passionate about their work are less likely to look outside of a company for new opportunities. Many corporations have employee giving programs like matching gifts or campaign-type programs. What are some best practices that are being implemented? There is no doubt that volunteer engagement is self-rewarding and serves as both a personal commitment and representation of the company. How do companies encourage, reward, and balance employee passion? What are key strategies and practices that keep companies at the top of their employee engagement game?

Participants will:

- Learn how one corporation has transitioned from a traditional campaign-style giving program toward an open choice and open giving program
- Receive best practice information for creating tools and resources for employees

The Evolution of Grants Management and You

LEARNING TRACK: Leadership

LEVEL: General

ROOM: Salon 6

 [#PEAK2018](#) [#GMevolution](#) [#grantsmgt](#)

Sara Davis, Director, Grants Management, The William and Flora Hewlett Foundation

The role and function of grants management continues to evolve in organizations across the philanthropic sector. We are performing new roles, taking on new responsibilities, and expanding our impact within the sector. This dynamic time of change requires us to develop new skills, communicate differently, and look ahead to the future in order to be ready. In this interactive session, we will discuss the evolution of grants management and explore the change we are all experiencing.

Participants will:

- Leave with new strategies to add even more value to their organization and further their careers

Health Equity Assessment and Strategy Development

LEARNING TRACK: Diversity, Equity, and

Inclusion, Leadership

LEVEL: General

ROOM: Camellia/Dogwood

 [#PEAK2018](#) [#DEI](#) [#equity](#) [#assessment](#)

Catherine Luce, MBA, Grants Manager, Maine Health Access Foundation

Jake Grindle, Program Officer, Maine Health Access Foundation

Gloria Aponte Clarke, MPH, Community Advisory Committee, Maine Health Access Foundation

Throughout 2017, the Maine Health Access Foundation (MeHAF) undertook a comprehensive effort to analyze and develop approaches to address issues of health equity. The foundation formed an equity subcommittee comprised of members of the board of trustees and the community advisory committee. The subcommittee conducted site visits with nonprofit organizations working in the field; planned and participated in a full-day training on equity issues with the full board, staff, and community advisory committee; and worked with consultants to conduct an internal assessment, which included an examination of their grantmaking and other processes, as well as interviews with more than 30 internal and external stakeholders. The learning from this combination of activities shaped a set of recommendations for more equitable practices across all of the foundation's activities. MeHAF will share the progress it has made to develop a shared framework and language for DEI for their organization in the areas of grantmaking strategy, leadership voice and visibility, and internal operations and culture.

Participants will:

- Learn how equity work necessitates change inside of institutions, alongside and in service to change in communities.
- Understand that an equity lens can influence how grantmaking priorities are identified and pursued

Improv Comedy for Grants Managers (Seriously!)—A Fresh Take

LEARNING TRACK: Leadership

LEVEL: Intermediate

ROOM: Azalea/Begonia

 [#PEAK2018](#) [#GMimprov](#)

Jen Bokoff, Director of Stakeholder Engagement, Foundation Center

Liz Donohue, Grants Administrator, Rockefeller Philanthropy Advisors

Building off "Improv Comedy for Grants Managers (Seriously!)," we will explore how to apply the fundamentals of improv in the workplace. At our 2016 and 2017 annual conferences, presenters

led participants through various games to introduce some improv comedy basics. This year, Jen and Liz will show you how to take those basics to the next level.

Participants will:

- Use "Yes, And" to build bridges instead of road blocks
- Show up to meetings ready to contribute and collaborate
- Discover how to turn mistakes into opportunities
- Adapt to change and ambiguity

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

Making Your Grants Knowledge #OpenForGood

LEARNING TRACK: Effective Practices, Knowledge Management, Outcomes/Evaluation, Technology

LEVEL: General

ROOM: Salon 8

 [#PEAK2018](#) [#openforgood](#) [#grantsmgt](#)

Janet Camarena, Director, Transparency Initiatives, Foundation Center

Hope Lyons, Director of Program Management, Rockefeller Brothers Fund

Jeff Ubois, Senior Program Officer, John D. and Catherine T. MacArthur Foundation

Laia Griño, Director, Data Discovery, Foundation Center

Join us to learn about how and why publicly sharing your grants data and related knowledge is a smart way to extend the impact of your grantmaking. An increasing volume of knowledge about problems, potential solutions, progress, and outcomes is now being stored in online grants management platforms. What would happen if just a fraction of this data was available to the social sector as a whole? Attend this session to learn about exciting experimentation in opening up grants data for the greater good. A featured case study will include the MacArthur Foundation's efforts to make its 100&Change competition as transparent as possible by sharing its treasure trove of unfunded applicant submissions designed to solve a critical issue of our time. What will you #OpenForGood?

Participants will:

- Learn about the #OpenForGood movement and new tools to facilitate building collective knowledge bases
- Understand how and when to open up

SESSION DESCRIPTIONS

BLOCK E (CONTINUED)

grants data, and how opening up grants applications can benefit the broader sector

- Hear inspiring examples from foundation peers that may shape the way grants data is opened up in the future

A Practical Guide to Developing Measurable Outcomes

LEARNING TRACK: Knowledge Management, Outcomes/Evaluation

LEVEL: General

ROOM: Salon 7

 [#PEAK2018](#) [#outcomes](#) [#grantoutcomes](#)

Lisa M. Nespeca, Owner, ChangeVantage Consulting

How can philanthropies know whether their investments are having the intended impact? Understanding how limited philanthropic dollars can be invested most effectively requires evidence-based analysis. Collecting data from grantees across program areas to determine whether and how desired outcomes are being achieved is an important way to provide fact-based support for decision making. Consistent data collection will enable an organization to track impact over time and across grantees.

Participants will:

- Learn to use data, and how and why to collect it
- Understand what outcomes are and how to develop them
- Understand what indicators are and how to develop them

Revisiting Reporting

LEARNING TRACK: Effective Practices

LEVEL: General

ROOM: Kahili/Lily

 [#PEAK2018](#) [#revisitingreporting](#)

Jessica Bearman, Consultant, Bearman Consulting

Elizabeth Myrick, Consultant, Elizabeth Myrick Consulting, LLC

Reporting can be one of the most pivotal points

in the grantmaking process. A careful balance must be met in order to ensure grants are on the right track. Ask for too little information and there's no way you can be sure your grantmaking is reaching the outcomes you set out to accomplish. Too much reporting drains your grantees resources. In order to find the best practices for reporting, Jessica Bearman, aka Dr. Streamline, set out to find out how grantmakers across the field were striking this delicate balance and whether any best practices had emerged that should be brought to prominence. Come hear about some of her findings and engage in a discussion to see what next steps your organization can take around this critical practice area.

Participants will:

- Understand the current state of reporting practice
- Gain knowledge of effective reporting practices and how foundations are streamlining the reporting process
- Consider which of these practices would help you achieve impact in your grantmaking and how to implement them

PARTNER SPONSORED SESSION

Alexa, What Is AI's Role in the Future of Grants Management?

Sponsored by WizeHive

LEARNING TRACK: Technology

LEVEL: General

ROOM: Fuschia/Gardenia

 [#PEAK2018](#) [#aigrantsmgt](#) [@wizehive](#)

Natalie Hirsch, Director of Product Management, WizeHive

Artificial intelligence still feels futuristic and perhaps even scary, but it's alive and in use around us every day—just like your smartphone and in-home concierges Alexa and Google Home. The technologies we've begun to use regularly to check the weather or look for take-out restaurants can also greatly improve the way we manage, track, review, and improve grants on a daily basis.

Participants will:

- Learn how intelligent automation, machine

learning, and chatbots could help streamline your programs' processes and enhance your application and review experience

- Understand how deep learning could analyze your data in new ways to better predict and enhance outcomes and impact

PARTNER SPONSORED SESSION


Putting Grantseekers First: How to Improve Access to Grants and Reduce Application Hurdles

Sponsored by SurveyMonkey

LEARNING TRACK: Effective Practices, Outcomes/Evaluation

LEVEL: General

ROOM: Narcissus/Orange Blossom

 [#PEAK2018](#) [#grantseekersfirst](#) [@surveymonkey](#)

Tracy Waksler, Director of Subscription Products, Foundation Center

Rafal Deren, Product and Online Marketing, SurveyMonkey Apply

Nonprofit organizations depend on grant funding to support and grow their programs. But, for many nonprofits, looking and applying for funding can be overwhelming, and they often struggle with identifying the right opportunities and navigating application processes. In this session, the presenters will explore how funders can better support grantseekers in their search for funding, which can lead to higher caliber grant requests from a new generation of problem-solvers poised to make an enormous impact.

Participants will:

- Understand the common obstacles grantseekers face when searching and applying for grant funding
- Learn how to structure processes to better align with the needs of grantseekers and yield better, more qualified proposals
- Explore how supporting grantseekers will help you leverage your resources and optimize your impact

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PEAK GRANTMAKING

14TH ANNUAL CONFERENCE



MARCH 11–13, 2019

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