

TRACK: COMPLIANCE

BLOCK B

GETTING THE REAL STORY FROM NONPROFIT FINANCIALS

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

Learning Track: Compliance, Effective Practices

Level: General

Hilda Polanco, Founder & CEO, FMA

GRANTMAKING 2.0: HELMSLEY'S STORY OF UPDATING ITS GRANTS MANAGEMENT PROCESSES

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

Learning Track: Compliance, Effective Practices, Hot Topics, Technology

Level: Intermediate

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
Ayorinde M'cleod, 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

MANAGING LEGAL AND COMPLIANCE ISSUES AT EVERY STAGE OF THE GRANT CYCLE

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.

Learning Track: Compliance

Level: Intermediate

Carly Leinheiser, Attorney, Robinson & Cole

PARTNER SPONSORED SESSION:
THE SHRINKING SPACE FOR CIVIL SOCIETY: WHAT GRANTMAKERS NEED TO KNOW

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

Learning Tracks: Compliance, Hot Topics

Level: General

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

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

BLOCK D

990-PF OVERVIEW

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

Learning Track: Compliance, Effective Practices, Hot Topics, Leadership

Level: Intermediate

Tom Blaney, Partner, PKF O'Connor Davies

Chris Peterman, Partner, PKF O'Connor Davies

DIVING DEEP INTO PROCESS IMPROVEMENT: GM OPTIMIZATION PART TWO

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

Learning Track: Compliance, Effective Practices, Leadership, Technology,

Level: Intermediate

Danette Peters, Principal Consultant, Onyx Consulting, LLC

GRANTMAKING: EXAMPLES FROM THE 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

Learning Track: Compliance, Diversity, Equity, and Inclusion, Effective Practices, Hot Topics, Leadership

Level: General

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

PHILANTHRO-ETHICS: HOW TO BE AN ETHICAL FUNDER

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.

Learning Track: Compliance, Effective Practices, Leadership

Level: General

Richard Marker, Faculty Co-Director, Funder Executive Education Program, University of Penn Center for High Impact Philanthropy

WHAT IS DATA SCIENCE AND WHAT DOES A PROJECT LOOK LIKE?

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

Learning Track: Compliance, Effective Practices, Hot Topics, Knowledge Management, Leadership, Outcomes/Evaluation, Technology

Level: General

Ania Wieczorel, Partner, Bowery Analytics

SHORT TALKS

HOW TO PLAY THE GAME WHEN THE RULES AREN'T CLEAR

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

Learning Track: Compliance, Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Meghan Hanson, Associate General Counsel, NGOsource from TechSoup

IMPLEMENTING A STRATEGIC PLAN TO ACCELERATE OUTCOMES: AN ORGANIZATION CASE-STUDY

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 5-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 a government funding agency, tasked with operationalizing a strategic plan to accelerate scientific outcomes, leveraged its grantmaking processes to align grantee funding with scientific outcomes, 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 your 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 organization structures and implement new tools to measure and monitor portfolio progress

Learning Track: Compliance, Effective Practices, Outcomes/Evaluation

Level: Intermediate

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

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

TRACK: DIVERSITY, EQUITY, AND INCLUSION

BLOCK A

BEYOND GOOD INTENTIONS: SELF-ASSESSMENT FOR EQUITY AND SYSTEMS CHANGE

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

Learning Track: Diversity, Equity, and Inclusion, Knowledge Management, Outcomes/Evaluation

Level: General

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

Jessica Bearman, Principal, Bearman Consulting

CAREFUL—THE QUEST FOR METRICS WILL STRANGLE COMMUNITY EMPOWERMENT AND STALL IMPACT

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

Learning Track: Diversity, Equity, and Inclusion

Level: Intermediate

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

PARTNER SPONSORED SESSION: **CREATING ORGANIZATIONAL CHANGE AND COLLABORATION**

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

Learning Track: Effective Practices, Technology

Level: General

Meghan Hanson, Associate General Counsel, TechSoup
Nora Mitnick, Grant Operations Manager, Russell Sage Foundation
Tierney Smith, Philanthropy Advisor, GrantBook

PARTNER SPONSORED SESSION: **HOW ACCESSIBLE IS YOUR GRANTMAKING?**

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

Learning Tracks: Diversity, Equity, and Inclusion, Technology

Level: General

BLOCK B

MOVING THE NEEDLE ON DIVERSITY & INCLUSION

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.

Learning Track: Diversity, Equity, & Inclusion

Level: General

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

Gregory C. Wright, Community Affairs Manager Florida, Duke Energy Foundation

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

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

BLOCK C

EMBEDDING EQUITY INSIDE AND OUT: HOW GRANTMAKING PROCESS AND CHANGE GO HAND-IN-HAND

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 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

Learning Track: Diversity, Equity, and Inclusion, Knowledge Management, Effective Practices

Level: General

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

REIGNITING YOUR CAREER SPARK

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

Learning Track: Diversity, Equity, and Inclusion, Leadership

Level: General

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

VALUES BASED HIRING: DISPELLING THE MYTH OF CULTURAL FIT

In this session, 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

Learning Track: Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Allison Gister, Director, Grants & Knowledge Management, Conrad N. Hilton Foundation

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Learning Track: Compliance, Effective Practices, Hot Topics, Leadership
Level: Intermediate

Tom Blaney, Partner, PKF O'Connor Davies
Chris Peterman, Partner, PKF O'Connor Davies

GRANTMAKING: EXAMPLES FROM THE 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.

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Learning Track: Compliance, Diversity, Equity, and Inclusion, Effective Practices, Hot Topics, Leadership
Level: General

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

SHORT TALKS

HEAR WHAT IS NOT SAID: A LOOK AT NONVERBAL COMMUNICATION

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.)

Learning Track: Diversity, Equity, and Inclusion, Leadership
Level: General

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

HOW TO PLAY THE GAME WHEN THE RULES AREN'T CLEAR

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.

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- Discover tools and resources to handle these situations in an ethical manner
- Understand how they can bring a critical eye to their own work

Learning Track: Compliance, Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Meghan Hanson, Associate General Counsel, NGOsource from TechSoup

POWER TO THE PEOPLE: PARTICIPATORY GRANTMAKING

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 share 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

Learning Track: Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: General

Jen Bokoff, Director of Stakeholder Engagement, Foundation Center

THE POWER OF YOUR STORY

Connecting in today’s volatile philanthropic environment is critical to our success. This session will challenge you to reflect on communicating the value of your institution to your community partners and the greater community. Learn techniques for making your organization relevant in the ever-changing marketplace by equipping your staff, board, and volunteers with powerful story starters.

Participants will:

- Understand the importance of their institution’s “story”
- Build empathy to communicate a more inclusive story
- Reflect on ways to better tell their story internally and externally

Learning Track: Diversity, Equity and Inclusion, Leadership

Level: General

Denise Barreto, Managing Partner, Relationships Matter Now, LLC

BLOCK E

HEALTH EQUITY ASSESSMENT AND STRATEGY DEVELOPMENT

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 racial equity 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

Learning Track: Diversity, Equity, and Inclusion, Leadership

Level: General

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

TRACK: EFFECTIVE PRACTICES

BLOCK A

CREATING DASHBOARDS MY COLLEAGUES LOVE TO USE

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

Learning Track: Effective Practices, Knowledge Management, Leadership, Technology

Level: General

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

DISASTER RELIEF

Responding to natural disasters is oftentimes reactive and done “in the moment” to meet devastating immediate needs. Participants will hear from corporate and community grantmakers about how to ensure response efforts are 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 through employee assistance funds and giving and volunteer programs
- Receive information on the latest natural disaster philanthropy resources available

Learning Track: Effective Practices, Technology

Level: General

INVESTING IN A LEARNING COMMUNITY TO BUILD CAPACITY FOR IMPACT

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

Learning Track: Effective Practices, Hot Topics, and Leadership

Level: Experienced

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

WALKING THE TALK – LEADING WITH VALUES

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.

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

Learning Track: Effective Practices, Hot Topics

Level: General

Nikki Powell, Communications and Practices Director, PEAK Grantmaking

PARTNER SPONSORED SESSION:

CREATING ORGANIZATIONAL CHANGE AND COLLABORATION

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Learning Track: Effective Practices, Technology

Level: General

Meghan Hanson, Associate General Counsel, TechSoup

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Hilda Polanco, Founder & CEO, FMA

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Jeannine Corey, Senior Consultant and Partner, Philanthropy.io
Rebecca Van Sickle, Managing Partner, 1892 consulting

NOT YOUR REGULAR “SAVE THE WHALES” CAMPAIGN: MAPPING CHANGEMAKING CAMPAIGNS

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.

Learning Track: Effective Practices, Hot Topics, Knowledge Management

Level: Intermediate

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

THE ROLE OF GRANTS MANAGERS IN BRIDGING MICROCULTURES

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

Learning Track: Effective Practices, Hot Topics, Leadership

Level: Intermediate

Kerry Medek, Director, Grants Management and Learning, GHR Foundation
Amy Shields, Program Manager, Grantmakers for Effective Organizations (GEO)

TRANSPARENCY MEETS REALITY: ARE YOU OVER- OR UNDER-PROTECTING YOUR DATA?

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

Learning Track: Effective Practices

Level: General

Laia Grino, Director, Data Discovery, Foundation Center

BLOCK C

DATA SHARING TOOLS—STORIES FROM GRANTMAKERS

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 NGOSource, 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. Audience members 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

Learning Track: Effective Practices, Technology

Level: General

Poney Carpenter, Project Manager, Simplify Initiative

EMBEDDING EQUITY INSIDE AND OUT: HOW GRANTMAKING PROCESS AND CHANGE GO HAND-IN-HAND

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 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

Learning Track: Diversity, Equity, and Inclusion, Knowledge Management, Effective Practices

Level: General

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

LIFE-CYCLE OF A PROGRAM RELATED INVESTMENT (AKA IMPACT INVESTMENT): A PRACTICAL GUIDE

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, the work that takes place for both a Foundation and recipient, 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. We will be using actual examples from both the Foundation side, and the recipient end.

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

Learning Track: Effective Practices

Level: General

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

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

Elsa Chin, Vice President of Global Philanthropy, JPMorgan Chase

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

BLOCK D

990-PF OVERVIEW

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

Learning Track: Compliance, Effective Practices, Hot Topics, Leadership
Level: Intermediate

Tom Blaney, Partner, PKF O'Connor Davies
Chris Peterman, Partner, PKF O'Connor Davies

DIVING DEEP INTO PROCESS IMPROVEMENT: GM OPTIMIZATION PART TWO

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

Learning Track: Compliance, Effective Practices, Leadership, Technology,
Level: Intermediate

Danette Peters, Principal Consultant, Onyx Consulting, LLC

GRANTMAKING: EXAMPLES FROM THE 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

Learning Track: Compliance, Diversity, Equity, and Inclusion, Effective Practices, Hot Topics, Leadership

Level: General

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

MAXIMIZING YOUR IMPACT: RISK MANAGEMENT IN GRANTMAKING

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

Learning Track: Effective Practices

Level: TBD

Maya Winkelstein Executive Director, Open Road Alliance

PEAK GRANTMAKING PRINCIPLES AND PRACTICES

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 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

Learning Track: Effective Practices

Level: Advanced

Nikki Powell, Communications and Practices Director, PEAK Grantmaking

Elizabeth Myrick, Consultant, Elizabeth Myrick Consulting, LLC

PHILANTHRO-ETHICS: HOW TO BE AN ETHICAL FUNDER

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.

Learning Track: Compliance, Effective Practices, Leadership

Level: General

Richard Marker, Faculty Co-Director, Funder Executive Education Program, University of Penn Center for High Impact Philanthropy

WHAT IS DATA SCIENCE AND WHAT DOES A PROJECT LOOK LIKE?

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

Learning Track: Compliance, Effective Practices, Hot Topics, Knowledge Management, Leadership, Outcomes/Evaluation, Technology

Level: General

Ania Wieczorel, Partner, Bowery Analytics

SHORT TALKS

GMS LAUNCH READINESS

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

Learning Track: Effective Practices, Technology,

Level: Intermediate

Crystal Mathews, Foundation Project Director, Sputnik Moment

HOW TO PLAY THE GAME WHEN THE RULES AREN'T CLEAR

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

Learning Track: Compliance, Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Meghan Hanson, Associate General Counsel, NGOsource from TechSoup

IMPLEMENTING A STRATEGIC PLAN TO ACCELERATE OUTCOMES: AN ORGANIZATION CASE-STUDY

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 5-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 a government funding agency, tasked with operationalizing a strategic plan to accelerate scientific outcomes, leveraged its grantmaking processes to align grantee funding with scientific outcomes, 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 your 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 organization structures and implement new tools to measure and monitor portfolio progress

Learning Track: Compliance, Effective Practices, Outcomes/Evaluation

Level: Intermediate

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

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

POWER TO THE PEOPLE: PARTICIPATORY GRANTMAKING

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 share 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

Learning Track: Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: General

Jen Bokoff, Director of Stakeholder Engagement, Foundation Center

A TRIPADVISOR FOR FUNDER FEEDBACK

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

Learning Track: Effective Practices

Level: General

Michelle Greanias, Executive Director, PEAK Grantmaking

Pia Infante, Co-Executive Director, The Whitman Institute

YOUR GEOGRAPHIC IMPACT—SPLITTING DOLLARS AND CENTS

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

Learning Track: Effective Practices, Knowledge Management, Outcomes/Evaluation, Technology

Level: General

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

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

BLOCK E

CORPORATE PHILANTHROPY IN TODAY'S WORLD OF EXPECTATIONS

What does corporate philanthropy look like in today's ever-changing marketplace? This session will provide insight on various topics, exploring how you can build your corporate portfolio of partnerships to move the needle on specific sustainable development goals (SDGs). It's important to have synergies between your corporate and foundation giving, and to go beyond communicating feel-good stories to telling the story of impact and staying compliant while doing all the great work.

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

Learning Track: Effective Practices

Level: General

Annie Rhodes, Director, Foundation Strategy, Blackbaud

MAKING YOUR GRANTS KNOWLEDGE #OPENFORGOOD

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.

Participants will:

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

Learning Track: Effective Practices, Hot Topics, Knowledge Management, Outcomes/Evaluation, Technology

Level: General

Janet Camarena, Director, Transparency Initiatives, Foundation Center

REVISITING REPORTING

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

Learning Track: Effective Practices

Level: General

Jessica Bearman, Consultant, Bearman Consulting

Elizabeth Myrick, Consultant, Elizabeth Myrick Consulting, LLC

PARTNER SPONSORED SESSION:

PUTTING GRANTSEEKERS FIRST: HOW TO IMPROVE ACCESS TO GRANTS AND REDUCE APPLICATION HURDLES

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

Learning Tracks: Effective Practices, Outcomes/Evaluation

Level: General

Tracy Waksler, Director of Subscription Products, Foundation Center

Rafal Deren, Product and Online Marketing, SurveyMonkey Apply

TRACK: HOT TOPICS

BLOCK A

INVESTING IN A LEARNING COMMUNITY TO BUILD CAPACITY FOR IMPACT

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

Learning Track: Effective Practices, Hot Topics, and Leadership

Level: Experienced

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

WALKING THE TALK – LEADING WITH VALUES

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.

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

Learning Track: Effective Practices, Hot Topics

Level: General

Nikki Powell, Communications and Practices Director, PEAK Grantmaking

BLOCK B

GRANTMAKING 2.0: HELMSLEY'S STORY OF UPDATING ITS GRANTS MANAGEMENT PROCESSES

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

Learning Track: Compliance, Effective Practices, Hot Topics, Technology

Level: Intermediate

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

Ayorinde M'cleod, 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

NOT YOUR REGULAR "SAVE THE WHALES" CAMPAIGN: MAPPING CHANGEMAKING CAMPAIGNS

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.

Learning Track: Effective Practices, Hot Topics, Knowledge Management

Level: Intermediate

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

THE ROLE OF GRANTS MANAGERS IN BRIDGING MICROCULTURES

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.

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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

Learning Track: Effective Practices, Hot Topics, Leadership

Level: Intermediate

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

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

PARTNER SPONSORED SESSION:

THE SHRINKING SPACE FOR CIVIL SOCIETY: WHAT GRANTMAKERS NEED TO KNOW

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

Learning Tracks: Compliance, Hot Topics

Level: General

Ted Hart ACFRE, CAP®, President and CEO, CAF America
Jessie Krafft, Vice President of Donor Advised and Grant Services, CAF America

BLOCK C

DAFS: AN INTRODUCTION TO A LIFETIME AND BEYOND OF PHILANTHROPY

In this session, panelists will discuss what a DAF (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.

Participants will:

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

Learning Track: Hot Topics, Knowledge Management

Level: General

Liza Lagunoff, Director Grants Budgeting, The New York Community Trust

Maggie Murphy, Grants Manager, The New York Community Trust

PARTNER SPONSORED SESSION: LATEST TRENDS IN GLOBAL PAYMENTS

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

Learning Tracks: Technology

Level: General

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

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

VALUES BASED HIRING: DISPELLING THE MYTH OF CULTURAL FIT

In this session, 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

Learning Track: Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Allison Gister, Director, Grants & Knowledge Management, Conrad N. Hilton Foundation

SHIFTING FROM EVALUATION TO VALUING: HOW KNOWLEDGE ENGAGEMENT AND EQUITY WORK HAND-IN-HAND

Grants managers sit at the heart of evaluation practice. They are in a key role to help foundations ask the right questions and hear and see the data in ways that really matter to impact and social change. Making an organizational shift from entrenched notions of third-party evaluation to creating a diversified knowledge development approach opens up new opportunities to think and talk about value in philanthropic work.

In this session, participants will be introduced to a knowledge framework for embedding equity into grantmaking for social change. Using tools designed for both internal and external engagement, participants will drill down quickly to how the framing can shift grant processes, systems, and analysis toward deeper equity understanding.

Participants will:

- Discover how to value and learn *with* diverse communities through grant processes
- Learn how to use grant processes to speak “up” by tapping into voices traditionally not heard
- Learn how to roll safely when you stumble...because we all do

Learning Track: Diversity, Equity, and Inclusion

Level: General

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

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Learning Track: Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Allison Gister, Director, Grants & Knowledge Management, Conrad N. Hilton Foundation

BLOCK D

GRANTMAKING: EXAMPLES FROM THE 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

Learning Track: Compliance, Diversity, Equity, and Inclusion, Effective Practices, Hot Topics, Leadership

Level: General

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

HOW BLOCKCHAIN IS CHANGING THE GRANTMAKING AND PHILANTHROPIC SECTOR TODAY

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

Learning Track: Hot Topics, Technology

Level: General

Joshua Sugar, CEO, Re-Solved

LEADING CHANGE AS A GRANTS MANAGER

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 The Change Cycle, Force Field Analysis, and Kotter's Eight-Step Model). 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 also have an opportunity to explore how these frameworks may provide greater insight into their ability to lead change within their organizations.

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

Learning Track: Hot Topics, Leadership

Level: General

Stephanie Chan, Program Specialist, Grantmakers for Effective Organizations

Susan Clark, Grants Manager, Gaylord and Dorothy Donnelley

Genise Singleton, Program Operations Manager, The Kresge Foundation

WHAT IS DATA SCIENCE AND WHAT DOES A PROJECT LOOK LIKE?

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

Learning Track: Compliance, Effective Practices, Hot Topics, Knowledge Management, Leadership, Outcomes/Evaluation, Technology

Level: General

Ania Wieczorel, Partner, Bowery Analytics

SHORT TALKS

HOW TO PLAY THE GAME WHEN THE RULES AREN'T CLEAR

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

Learning Track: Compliance, Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Meghan Hanson, Associate General Counsel, NGOsource from TechSoup

POWER TO THE PEOPLE: PARTICIPATORY GRANTMAKING

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 share 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

Learning Track: Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: General

Jen Bokoff, Director of Stakeholder Engagement, Foundation Center

BLOCK E

MAKING YOUR GRANTS KNOWLEDGE #OPENFORGOOD

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.

Participants will:

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

Learning Track: Effective Practices, Hot Topics, Knowledge Management, Outcomes/Evaluation, Technology

Level: General

Janet Camarena, Director, Transparency Initiatives, Foundation Center

PARTNER SPONSORED SESSION:

ALEXA, WHAT IS AI'S ROLE IN THE FUTURE OF GRANTS MANAGEMENT?

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

Learning Tracks: Hot Topics, Technology

Level: General

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

Natalie Hirsch, Director of Product Management, WizeHive

TRACK: KNOWLEDGE MANAGEMENT

BLOCK A

BEYOND GOOD INTENTIONS: SELF-ASSESSMENT FOR EQUITY AND SYSTEMS CHANGE

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

Learning Track: Diversity, Equity, and Inclusion, Knowledge Management, Outcomes/Evaluation

Level: General

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

Jessica Bearman, Principal, Bearman Consulting

CREATING DASHBOARDS MY COLLEAGUES LOVE TO USE

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

Learning Track: Effective Practices, Knowledge Management, Leadership, Technology
Level: General

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

IMPACT MEASUREMENT SHOWCASE

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.

Learning Track: Knowledge Management, Outcomes/Evaluation,
Level: Intermediate

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

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

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

Patrick Taylor, Grants Manager, Zellerbach Family Foundation

BLOCK B

NOT YOUR REGULAR “SAVE THE WHALES” CAMPAIGN: MAPPING CHANGEMAKING CAMPAIGNS

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.

Learning Track: Effective Practices, Hot Topics, Knowledge Management
Level: Intermediate

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

BLOCK C

DAFS: AN INTRODUCTION TO A LIFETIME AND BEYOND OF PHILANTHROPY

In this session, panelists will discuss what a DAF (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.

Participants will:

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

Learning Track: Hot Topics, Knowledge Management

Level: General

Liza Lagunoff, Director Grants Budgeting, The New York Community Trust

Maggie Murphy, Grants Manager, The New York Community Trust

EMBEDDING EQUITY INSIDE AND OUT: HOW GRANTMAKING PROCESS AND CHANGE GO HAND-IN-HAND

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 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

Learning Track: Diversity, Equity, and Inclusion, Knowledge Management, Effective Practices

Level: General

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

BLOCK D

MANAGING BOTH THE ART AND SCIENCE OF RESULTS-TRACKING

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

Learning Track: Knowledge Management, Outcomes/Evaluation, Technology

Level: Intermediate

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

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

Roberto Cremonini, Partner, GivingData

WHAT IS DATA SCIENCE AND WHAT DOES A PROJECT LOOK LIKE?

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Learning Track: Compliance, Effective Practices, Hot Topics, Knowledge Management, Leadership, Outcomes/Evaluation, Technology

Level: General

Ania Wieczorel, Partner, Bowery Analytics

SHORT TALKS

YOUR GEOGRAPHIC IMPACT—SPLITTING DOLLARS AND CENTS

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

Learning Track: Effective Practices, Knowledge Management, Outcomes/Evaluation, Technology
Level: General

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

BLOCK E

MAKING YOUR GRANTS KNOWLEDGE #OPENFORGOOD

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Learning Track: Effective Practices, Hot Topics, Knowledge Management, Outcomes/Evaluation, Technology
Level: General

Janet Camarena, Director, Transparency Initiatives, Foundation Center

A PRACTICAL GUIDE TO DEVELOPING MEASURABLE OUTCOMES

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

Learning Track: Knowledge Management, Outcomes/Evaluation

Level: General

Lisa M. Nespeca, Owner, ChangeVantage Consulting

TRACK: LEADERSHIP

BLOCK A

CREATING DASHBOARDS MY COLLEAGUES LOVE TO USE

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Learning Track: Effective Practices, Knowledge Management, Leadership, Technology

Level: General

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

INVESTING IN A LEARNING COMMUNITY TO BUILD CAPACITY FOR IMPACT

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

Learning Track: Effective Practices, Hot Topics, and Leadership

Level: Experienced

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

BLOCK B

THE ROLE OF GRANTS MANAGERS IN BRIDGING MICROCULTURES

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

Learning Track: Effective Practices, Hot Topics, Leadership

Level: Intermediate

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

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

BLOCK C

REIGNITING YOUR CAREER SPARK

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

Learning Track: Leadership

Level: General

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

VALUES BASED HIRING: DISPELLING THE MYTH OF CULTURAL FIT

In this session, 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

Learning Track: Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Allison Gister, Director, Grants & Knowledge Management, Conrad N. Hilton Foundation

BLOCK D

990-PF OVERVIEW

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

Learning Track: Compliance, Effective Practices, Hot Topics, Leadership

Level: Intermediate

Tom Blaney, Partner, PKF O'Connor Davies

Chris Peterman, Partner, PKF O'Connor Davies

DIVING DEEP INTO PROCESS IMPROVEMENT: GM OPTIMIZATION PART TWO

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

Learning Track: Compliance, Effective Practices, Leadership, Technology,
Level: Intermediate

Danette Peters, Principal Consultant, Onyx Consulting, LLC

GRANTMAKING: EXAMPLES FROM THE 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.

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Level: General

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

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Learning Track: Hot Topics, Leadership

Level: General

Stephanie Chan, Program Specialist, Grantmakers for Effective Organizations
Susan Clark, Grants Manager, Gaylord and Dorothy Donnelley
Genise Singleton, Program Operations Manager, The Kresge Foundation

PHILANTHRO-ETHICS: HOW TO BE AN ETHICAL FUNDER

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.

Learning Track: Compliance, Effective Practices, Leadership
Level: General

Richard Marker, Faculty Co-Director, Funder Executive Education Program, University of Penn Center for High Impact Philanthropy

WHAT IS DATA SCIENCE AND WHAT DOES A PROJECT LOOK LIKE?

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Learning Track: Compliance, Effective Practices, Hot Topics, Knowledge Management, Leadership, Outcomes/Evaluation, Technology
Level: General

Ania Wieczorel, Partner, Bowery Analytics

SHORT TALKS

HEAR WHAT IS NOT SAID: A LOOK AT NONVERBAL COMMUNICATION

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.)

Learning Track: Leadership

Level: General

LaShonda Barnett, Manager – Grants & Research, Dallas Women’s Foundation

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

HOW TO PLAY THE GAME WHEN THE RULES AREN’T CLEAR

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.

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- Discover tools and resources to handle these situations in an ethical manner
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Learning Track: Compliance, Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: Intermediate

Meghan Hanson, Associate General Counsel, NGOsource from TechSoup

POWER TO THE PEOPLE: PARTICIPATORY GRANTMAKING

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Participants will:

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

Learning Track: Effective Practices, Diversity, Equity, and Inclusion, Hot Topics, Leadership

Level: General

Jen Bokoff, Director of Stakeholder Engagement, Foundation Center

THE POWER OF YOUR STORY

Connecting in today’s volatile philanthropic environment is critical to our success. This session will challenge you to reflect on communicating the value of your institution to your community partners and the greater community. Learn techniques for making your organization relevant in the ever-changing marketplace by equipping your staff, board, and volunteers with powerful story starters.

Participants will:

- Understand the importance of their institution’s “story”
- Build empathy to communicate a more inclusive story

- Reflect on ways to better tell their story internally and externally

Learning Track: Leadership

Level: General

Denise Barreto, Managing Partner, Relationships Matter Now, LLC

BLOCK E

THE EVOLUTION OF GRANTS MANAGEMENT AND YOU

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.

Learning Track: Leadership

Level: General

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

HEALTH EQUITY ASSESSMENT AND STRATEGY DEVELOPMENT

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 racial equity 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

Learning Track: Diversity, Equity, and Inclusion, Leadership

Level: General

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

IMPROV COMEDY FOR GRANTS MANAGERS (SERIOUSLY!)—A FRESH TAKE

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, Jen and Gretchen

led participants through various games to introduce some improv comedy basics. This year they are back to 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

Learning Track: Leadership

Level: Intermediate

Jen Bokoff, Director of Stakeholder Engagement, Foundation Center

Gretchen Shackel, Grants Manager, James F. and Marion L. Miller Foundation

TRACK: OUTCOMES/EVALUATION

BLOCK A

BEYOND GOOD INTENTIONS: SELF-ASSESSMENT FOR EQUITY AND SYSTEMS CHANGE

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

Learning Track: Diversity, Equity, and Inclusion, Knowledge Management, Outcomes/Evaluation

Level: General

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

Jessica Bearman, Principal, Bearman Consulting

IMPACT MEASUREMENT SHOWCASE

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.

Learning Track: Knowledge Management, Outcomes/Evaluation,

Level: Intermediate

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

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

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

Patrick Taylor, Grants Manager, Zellerbach Family Foundation

BLOCK D

MANAGING BOTH THE ART AND SCIENCE OF RESULTS-TRACKING

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

Learning Track: Knowledge Management, Outcomes/Evaluation, Technology

Level: Intermediate

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

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

Roberto Cremonini, Partner, GivingData

WHAT IS DATA SCIENCE AND WHAT DOES A PROJECT LOOK LIKE?

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

Learning Track: Compliance, Effective Practices, Hot Topics, Knowledge Management, Leadership, Outcomes/Evaluation, Technology

Level: General

Ania Wieczorel, Partner, Bowery Analytics

SHORT TALKS

IMPLEMENTING A STRATEGIC PLAN TO ACCELERATE OUTCOMES: AN ORGANIZATION CASE-STUDY

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 5-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 a government funding agency, tasked with operationalizing a strategic plan to accelerate scientific outcomes, leveraged its grantmaking processes to align grantee funding with scientific outcomes, 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 your 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 organization structures and implement new tools to measure and monitor portfolio progress

Learning Track: Compliance, Effective Practices, Outcomes/Evaluation

Level: Intermediate

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

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

YOUR GEOGRAPHIC IMPACT—SPLITTING DOLLARS AND CENTS

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

Learning Track: Effective Practices, Knowledge Management, Outcomes/Evaluation, Technology
Level: General

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

BLOCK E

MAKING YOUR GRANTS KNOWLEDGE #OPENFORGOOD

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.

Participants will:

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

Learning Track: Effective Practices, Hot Topics, Knowledge Management, Outcomes/Evaluation, Technology
Level: General

Janet Camarena, Director, Transparency Initiatives, Foundation Center

A PRACTICAL GUIDE TO DEVELOPING MEASURABLE OUTCOMES

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

Learning Track: Knowledge Management, Outcomes/Evaluation
Level: General

Lisa M. Nespeca, Owner, ChangeVantage Consulting

PARTNER SPONSORED SESSION:
PUTTING GRANTSEEKERS FIRST: HOW TO IMPROVE ACCESS TO GRANTS AND REDUCE APPLICATION HURDLES

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

Learning Tracks: Effective Practices, Outcomes/Evaluation

Level: General

Tracy Waksler, Director of Subscription Products, Foundation Center

Rafal Deren, Product and Online Marketing, SurveyMonkey Apply

TRACK: TECHNOLOGY

BLOCK A

CREATING DASHBOARDS MY COLLEAGUES LOVE TO USE

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

Learning Track: Effective Practices, Knowledge Management, Leadership, Technology

Level: General

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

PARTNER SPONSORED SESSION:

CREATING ORGANIZATIONAL CHANGE AND COLLABORATION

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

Learning Track: Effective Practices, Technology

Level: General

Meghan Hanson, Associate General Counsel, TechSoup
Nora Mitnick, Grant Operations Manager, Russell Sage Foundation
Tierney Smith, Philanthropy Advisor, GrantBook

PARTNER SPONSORED SESSION: **HOW ACCESSIBLE IS YOUR GRANTMAKING?**

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

Learning Tracks: Diversity, Equity, and Inclusion, Technology

Level: General

Mark Bridger, User Interface Lead & Training Officer, SmartSimple

BLOCK B

GRANTMAKING 2.0: HELMSLEY'S STORY OF UPDATING ITS GRANTS MANAGEMENT PROCESSES

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

Learning Track: Compliance, Effective Practices, Hot Topics, Technology

Level: Intermediate

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

Ayorinde M'cleod, 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

PARTNER SPONSORED SESSION: **NEVER TYPE THE SAME THING TWICE**

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 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

Learning Tracks: Technology

Level: General

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

Henry A. Bromelkamp, President, Bromelkamp Company LLC

BLOCK C

DATA SHARING TOOLS—STORIES FROM GRANTMAKERS

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 NGOSource, 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. Audience members 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

Learning Track: Effective Practices, Technology

Level: General

Poney Carpenter, Project Manager, Simplify Initiative

PARTNER SPONSORED SESSION:

ACHIEVING MISSION THROUGH BETTER TECHNOLOGY: HOW TO CHANGE GRANTS MANAGEMENT SYSTEMS WITHOUT CHANGING YOUR VALUES

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

Learning Track: Technology

Level: General

John J. Mohr, Chief Information Officer, MacArthur Foundation

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

PARTNER SPONSORED SESSION:
LATEST TRENDS IN GLOBAL PAYMENTS

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

Learning Tracks: Technology

Level: General

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

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

9:45AM-11:00AM

PARTNER SPONSORED SESSION:

FOUNDANT GRANT LIFECYCLE MANAGER (GLM) USER GROUP

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

Learning Track: Technology

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

BLOCK D

DIVING DEEP INTO PROCESS IMPROVEMENT: GM OPTIMIZATION PART TWO

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

Learning Track: Compliance, Effective Practices, Leadership, Technology,
Level: Intermediate

Danette Peters, Principal Consultant, Onyx Consulting, LLC

HOW BLOCKCHAIN IS CHANGING THE GRANTMAKING AND PHILANTHROPIC SECTOR TODAY

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

Learning Track: Hot Topics, Technology

Level: General

Joshua Sugar, CEO, Re-Solved

MANAGING BOTH THE ART AND SCIENCE OF RESULTS-TRACKING

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.

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Learning Track: Knowledge Management, Outcomes/Evaluation, Technology

Level: Intermediate

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

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

Roberto Cremonini, Partner, GivingData

WHAT IS DATA SCIENCE AND WHAT DOES A PROJECT LOOK LIKE?

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.

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- Learn the specific steps of a data project lifecycle
- Get tools and understand the skills critical to a data science project

Learning Track: Compliance, Effective Practices, Hot Topics, Knowledge Management, Leadership, Outcomes/Evaluation, Technology
Level: General

Ania Wiczorel, Partner, Bowery Analytics

PARTNER SPONSORED SESSION:

LEVERAGING THE TECH ECOSYSTEM OF GOOD TO ACCOMPLISH YOUR GOALS

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

Learning Track: Technology
Level: General

Annie Rhodes, Director of Foundation Strategy, Blackbaud

SHORT TALKS

GMS LAUNCH READINESS

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

Learning Track: Effective Practices, Technology,
Level: Intermediate

Crystal Mathews, Foundation Project Director, Sputnik Moment

2:00PM-3:30PM

PARTNER SPONSORED SESSION:

GRANTEE INCLUSION AND THE ROLE OF TECHNOLOGY

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

Learning Track: Technology

Level: Intermediate

Nicolle Bennett, Senior Consultant, roundCorner

Kerri Hurley, Director of Grants Management, Barr Foundation

Adrian Bordone, Vice President, Strategic Partnerships, GuideStar USA

PARTNER SPONSORED SESSION:

GRANTEE RELATIONSHIP MANAGEMENT (GRM) TO SUPPORT IMPACTFUL GRANTMAKING: VISIONS, NEEDS, SOLUTIONS

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

Learning Track: Technology

Level: General

Alfred Gracombe, President & Founding Partner, GivingData

Roberto Cremonini, Senior Partner, GivingData

YOUR GEOGRAPHIC IMPACT—SPLITTING DOLLARS AND CENTS

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.

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- Learn how to create and use geographic split reports
- Discover ways to communicate their findings to stakeholders

Learning Track: Effective Practices, Knowledge Management, Outcomes/Evaluation, Technology

Level: General

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

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

BLOCK E

MAKING YOUR GRANTS KNOWLEDGE #OPENFORGOOD

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.

Participants will:

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

Learning Track: Effective Practices, Hot Topics, Knowledge Management, Outcomes/Evaluation, Technology

Level: General

Janet Camarena, Director, Transparency Initiatives, Foundation Center

PARTNER SPONSORED SESSION:

ALEXA, WHAT IS AI'S ROLE IN THE FUTURE OF GRANTS MANAGEMENT?

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

Learning Tracks: Hot Topics, Technology

Level: General

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

Natalie Hirsch, Director of Product Management, WizeHive