

Grantmakers for
Effective Organizations
presents

The Learning Conference 2013

Held in partnership with
Florida Philanthropic Network

Miami
June 3–4

Hilton Miami Downtown

Hashtag #GEOLearn | www.bit.ly/GEOlearn



About GEO

Grantmakers for Effective Organizations is a community of nearly 3,700 individuals representing more than 425 grantmakers that are challenging the status quo in philanthropy to help nonprofits achieve more. Understanding that grantmakers are successful only to the extent that their grantees achieve meaningful results, GEO promotes strategies and practices that contribute to grantee success. We help grantmakers improve practices in areas which, through years of work in philanthropy, have been identified by innovators in the field as critical to nonprofit success: learning for improvement, collaborative problem-solving, funding outcomes, stakeholder engagement and *Scaling What Works*. For more about GEO, visit www.geofunders.org.



Our Partner

Florida Philanthropic Network is a statewide association of more than 100 grantmakers working to build philanthropy to build a better Florida. FPN's members are private independent, corporate and family foundations, community foundations, public charity grantmakers and corporate giving programs — from Miami to Jacksonville; Naples to Pensacola — who hold over \$6.5 billion in assets and invest over \$430 million annually (excluding members located outside Florida) to improve the quality of life for our citizens. Our members share a commitment to promoting philanthropy, fostering collaboration and advancing public policy by *Florida, in Florida*. For more information, visit www.fpnnetwork.org.

Conference Planning Committee Members

- Rebekah Levin, Robert R. McCormick Foundation (chair)
- Cory Anderson, Winthrop Rockefeller Foundation
- Chantell Johnson, John D. and Catherine T. MacArthur Foundation
- Ify Mora, Barr Foundation
- Maggie Osborn, formerly with the Florida Philanthropic Network
- Lance Potter, New Profit Inc.
- Paul Putman, The Cleveland Foundation
- Ehren Reed, Skoll Foundation
- Diana Searce, The David and Lucile Packard Foundation
- Jonathan Sotsky, John S. and James L. Knight Foundation

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- Suzanne Walsh, Bill & Melinda Gates Foundation
- Susan Zepeda, Foundation for a Healthy Kentucky
- Kathleen P. Enright, Grantmakers for Effective Organizations (ex officio)

The Learning Conference 2013

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Ambassador Program

GEO conferences create lasting connections that strengthen grantmakers' work and build community. GEO's Ambassador Program facilitates and deepens both first-time and seasoned participants' networking experiences. Those who are new to GEO are making the most of this year's Learning Conference by tapping the knowledge of a seasoned GEO member. If you're new to GEO and have questions, feel free to ask anyone with an Ambassador ribbon on their name tag — they, along with any GEO staff member, are happy to help!

GEO's Conferences Are Paper-Lite

As part of our conference sustainability plan, GEO does not provide printed copies of session handouts or presentations, speaker bios or the participant roster. GEO has made session resources available electronically for download through our website at www.bit.ly/GEOlearn.

Welcome to Miami and to Grantmakers for Effective Organizations' The Learning Conference 2013, held in partnership with the Florida Philanthropic Network. As a community of grantmakers committed to supporting strong and effective nonprofits, GEO has long worked to lift up evaluation in philanthropy as a powerful tool for both learning and improvement.

At this year's event we'll hear about the role data, learning and continuous improvement play in building resilient organizations and communities. We'll also explore how learning done in real time with a clear focus can better equip us to make meaningful adjustments to our work.

Over the next two days, you will be exposed to new perspectives, ideas and tools to help improve your learning practice. More importantly, you will have the opportunity to make connections with colleagues who can support your own learning journey in the years ahead.

The Learning Conference is filled with interactive sessions, peer-to-peer networking and time for reflection to help you successfully navigate the challenges and opportunities associated with making learning a priority.

We are grateful for the contributions of all of our speakers, financial supporters, and planning committee members and, of course, our partner, the Florida Philanthropic Network. We hope the conference will equip and empower you to support a culture of learning within your own organization and to learn in partnership with others who share your purpose.

Sincerely,



A handwritten signature in black ink that reads "Kathleen P. Enright".

Kathleen P. Enright
President and CEO
Grantmakers for Effective Organizations



A handwritten signature in black ink that reads "Rebekah Levin".

Rebekah Levin
Director of Evaluation & Learning
Robert R. McCormick Foundation

RESOURCES GUIDE



Session Resources. Participant Roster. Facilitator Bios.

It's all online. Just use a Quick Response code reader on your smartphone to scan the QR code at left, or visit www.bit.ly/GEOlearn.



Twitter

#GEOLearn Use this hashtag to share your insights from the conference and to see what others are saying.

@geofunders GEO's Twitter handle; follow it for updates during the conference and for news, resources and opportunities throughout the year.



LinkedIn

bit.ly/LinkedInGEO GEO members are invited to join our new LinkedIn group, to dialogue and exchange ideas that don't quite fit into 140 characters. Since the group is only open to GEO members, it's also a great environment for giving input and seeking advice from your peers, and GEO staff are regularly posting resources, learning opportunities, job openings and more.



Network with Members

A great resource for grantmaker collaboration, our Network with Members online tool allows GEO members to connect with each other by searching a database of grantmakers based on geographic location, role, grantmaking interests, organization and last name.

Visit www.geofunders.org/network-with-members to use this feature and to join the ranks of those leading the charge for more effective grantmaking.



Additional Resources for Grantmakers

www.geofunders.org Visit GEO's website for more learning opportunities and resources for grantmakers, including GEO Action Guides and publications.



The Huffington Post

GEO President and CEO Kathleen Enright shares her insights on grantmaking as a contributor to *The Huffington Post*. You can view her posts at www.huffingtonpost.com/kathleen-p-enright.

SCHEDULE AT A

Monday, June 3, 2013

Registration is open from 8:00 a.m. to 5:00 p.m. in the Overture Foyer.

TIME	SESSION	LOCATION
8:30 – 11:30 a.m.	Pre-Conference Workshops <i>(advanced registration required)</i>	
	W1. Evaluation Basics for the Impact Eager, Resource Meager W2. Change Agents for Learning	Concerto A Concerto B
11:30 – 1:30 p.m.	Opening Plenary Luncheon Toward Resilience	Symphony Ballroom I and II
1:40 – 2:00 p.m.	Short Talks Round 1	
	Innovation Isn't Graded on a Curve <i>Tonya Allen, Skillman Foundation</i>	Concerto A
	How Social Innovation Is Like Art, and Why Philanthropy Should Nourish It <i>Kiff Gallagher, MusicianCorps</i>	Concerto B
2:10 – 2:30 p.m.	Short Talks Round 2	
	Made to Measure? <i>Udaya Patnaik, Jump Associates</i>	Concerto A
	Did I Make a Bad Grant, or Did I Make a Grant Badly? <i>Mae Hong, Rockefeller Philanthropy Advisors</i>	Concerto B
2:40 – 3:00 p.m.	Short Talks Round 3	
	Fast Feedback: How Imperfect Data Now Are Better than Perfect Data Later <i>Wayan Vota, Kurante</i>	Concerto A
	<i>Connie Yowell, John D. and Catherine T. MacArthur Foundation</i>	Concerto B
3:00 – 4:00 p.m.	Discussion Groups	Symphony Ballroom I and II
4:00 – 7:00 p.m.	Fail Fest and Evening Reception	Concerto A and B
7:00 p.m.	Dine Arounds	Off-site

GLANCE

Tuesday, June 4, 2013

Registration is open from 7:30 a.m. to 3:00 p.m. in the Overture Foyer.

TIME	SESSION	LOCATION
7:30 – 8:30 a.m.	Networking Breakfast	Symphony Ballroom I and II
8:30 – 10:00 a.m.	Breakout Sessions Round A	
	A1. Building the Collective Capacity of Grantees for Learning	Concerto B
	A2. Adding It All Up and Learning from the Portfolio	Tenor
	A3. Making the Right Evaluation Choices for Your Organization	Concerto A
	A4. How Networks Learn	Picasso
10:00 – 10:30 a.m.	Networking Break	Overture Foyer
10:30 – 12:00 p.m.	Breakout Sessions Round B	
	B1. Breakthrough Strategies to Create a Meaningful Learning Environment	Concerto B
	B2. Putting Evidence-Based Grantmaking into Context	Picasso
	B3. Who Cares? Audience-Driven Strategies for Communicating Impact	Tenor
	B4. Removing the Roadblocks to Learning	Concerto A
12:00 – 2:00 p.m.	Closing Plenary Luncheon Real Learning in Real Time	Symphony Ballroom I and II
2:30 – 5:00 p.m.	Post-Conference Workshops <i>(advanced registration required)</i>	
	W3. Developmental Evaluation: What Are You Ready to Do?	Concerto B

MONDAY JUNE 3, 2013

8:30 A.M. – 11:30 A.M. PRE-CONFERENCE WORKSHOPS

Advanced registration and an additional fee are required for workshops.

W1

Evaluation Basics for the Impact Eager, Resource Meager

Concerto A

Co-presenters: Sara Beggs, Association of Small Foundations, and Catherine A. Gura, The Children's Guild Foundation

Once your foundation decides where it's headed, evaluation can be a powerful way to assess progress toward your goals, improve your work and obtain results more quickly. Join this introductory evaluation session to learn about a simple, five-step framework to start your foundation on a path to implementing its own evaluation plan and incorporating learning into your everyday work — even if you're short on time, staff or money. Explore the framework and its uses, engage in round table discussion with peers and apply the concepts to your own foundation's work.

W2

Change Agents for Learning

Concerto B

Facilitator: Jessica Bearman, Bearman Consulting

Most grantmakers would agree that learning is important to effectiveness in philanthropy. And many funders are experimenting with a host of approaches to building a learning agenda — including specific learning objectives and activities — into the weekly, monthly or annual work of their organizations. For those staff members charged with making it happen, this task can feel daunting as you try to squeeze reflection, mentoring and skills-building into colleagues' packed schedules. This practice-based session is designed for individuals who are charged with creating their organization's learning agenda. As a group, peers will explore their roles and the specific structures, systems, meeting designs and other techniques and technologies they employ to spark learning at the individual, team and organizational levels. Participants will leave with concrete action plans and a network of colleagues interested in continuing to share strategies, successes and challenges.

Toward Resilience

Symphony Ballroom I and II

It's the question that many grantmakers are striving to answer: in an age of increasing volatility, how can we bolster the capacity of people, communities and systems to recover, persist or even thrive amid disruption?

For four years, PopTech's Andrew Zolli and his collaborators traveled the globe exploring the dynamics of resilience, the ability to adapt and successfully respond to a wide variety of unforeseen challenges and disruptive change. It brought them into contact with innovators, change agents and leaders who are transforming at-risk ecosystems in the Pacific Ocean, reforming financial systems in Iceland and strengthening communities besieged by Superstorm Sandy.

Grantmakers have an opportunity to be at the nexus of resilient systems, people and places. Zolli will explore new approaches to building capacity and enhancing community efficacy and self-reliance, and highlight the role of learning and continuous improvement in constructing a more vibrant, healthy and sustainable future.



Speakers:

*Andrew Zolli,
PopTech*



*Kathleen Enright,
GEO (emcee)*



*Sidney Hargro,
Community Foundation of
South Jersey (respondent)*



*Connie Yowell,
John D. and Catherine T.
MacArthur Foundation
(respondent)*



1:30 P.M. – 3:00 P.M. SHORT TALKS

Short talk presentations are designed to highlight provocative ideas and new perspectives from thought leaders within and outside of philanthropy. Participants have the opportunity to join up to three short talks by selecting one topic during each of the three rounds.

TIME SLOT	CONCERTO A	CONCERTO B
Round 1: 1:40 – 2:00	1. Tonya Allen	2. Kiff Gallagher
Round 2: 2:10 – 2:30	3. Udaya Patnaik	4. Mae Hong
Round 3: 2:40 – 3:00	5. Wayan Vota	6. Connie Yowell

ROUND 1 OPTIONS:

1. Innovation Isn't Graded on a Curve



Tonya Allen, Skillman Foundation

Concerto A

Philanthropy often describes its role as a capital source to drive innovation. However, when we look deeply at philanthropic organizations they rarely resemble or promote innovation within or outside of their institutions. The Skillman Foundation is widely recognized as a leading innovative foundation, because of its commitment to learning, data, results, co-funding and embedded, community leadership to improve schools and neighborhoods in Detroit. Yet it is pivoting to strengthen its ability to maximize, attract and syndicate capital in all forms, including financial, social, political and human, to create the ability to be a truly innovative organization. Skillman's story challenges grantmakers to rethink how varying philanthropic efforts and institutional structures can promote innovation and relevance to solve social challenges.

2. How Social Innovation Is Like Art, and Why Philanthropy Should Nourish It



Kiff Gallagher, MusicianCorps

Concerto B

Sustained impact in philanthropy, like social entrepreneurship, demands continuous adaptation and learning. Even as funders seek to scale "proven" models with predictable outcomes, the most effective long-term community solutions often emerge from a somewhat messy process that includes trying new things, failing, revising and trying again. Funders can drive innovation in the social sector by measuring and rewarding the creative process. Kiff Gallagher will explore lessons learned in the creation of MusicianCorps — which supports music for social impact, and musicians as public servants — and the direct connections between creative practice, social innovation and philanthropic efficacy.

ROUND 2 OPTIONS:

3. Made to Measure?



Udaya Patnaik, Jump Associates

Concerto A

Taking their cue from the for-profit world, many grantmakers have invested heavily in metrics and evaluation. Sometimes it has spurred good outcomes or helped a CEO, trustee or program officer fill in a dashboard or legitimize a decision. Other times it has simply created more data that lack meaning. Many corporations have rethought what they measure and why, even reducing their scorecards to one metric. Many private sector organizations now use a variety of different methods, measures and data, each for very different purposes. Udaya Patnaik will explore what we can learn from such efforts to help rethink the role of evaluation for philanthropy.

4. Did I Make a Bad Grant, or Did I Make a Grant Badly?



Mae Hong, Rockefeller Philanthropy Advisors

Concerto B

For all the hand-wringing and hair-pulling we do about our grantees' evaluation results, funders seldom pause to reflect about their own culpability in their grantees' success. When we are disappointed by what a grantee achieves (or not) with our funding, we console ourselves with "what we learned" and pat ourselves on the back for having "taken a risk" on something. But we don't ask ourselves, "How was my grant responsible for this outcome?" "What might I have done differently to help contribute to success?" Mae Hong will encourage participants to change the questions we ask grantees and ourselves.

ROUND 3 OPTIONS:

5. Fast Feedback: How Imperfect Data Now Are Better than Perfect Data Later



Wayan Vota, Kurante

Concerto A

In a perfect world, we could conduct long-term studies and randomized control trials to find the most effective intervention, but in reality we often have to make time-constrained decisions and gauge effectiveness with limited information. This presentation will look at how we can use new data sources like big data, social media and mobile phones to augment traditional feedback systems to have a better view, faster, of intervention effectiveness with a focus on international development programs.

1:30 P.M. – 3:00 P.M. SHORT TALKS CONTINUED

6.



*Connie Yowell, John D. and Catherine T. MacArthur Foundation
Concerto B*

3:00 P.M. – 4:00 P.M. DISCUSSION GROUPS

Symphony Ballroom I and II

We've heard from you that one of the greatest benefits of GEO conferences is being able to connect with a community of like-minded colleagues. During this session you can:

- **Option 1: Join a discussion with a short talk speaker.**
 - *Tonya Allen, Skillman Foundation*
 - *Kiff Gallagher, MusicianCorps*
 - *Mae Hong, Rockefeller Philanthropy Advisors*
 - *Udaya Patnaik, Jump Associates*
 - *Wayan Vota, Kurante*
 - *Connie Yowell, John D. and Catherine T. MacArthur Foundation*
- **Option 2: Form or join a small group discussion to explore a shared topic of interest. Join one of the conversations listed below or find additional options available in the Symphony Ballroom. If you want to host a discussion group, please add your name and topic to the list in the registration area by 1:30 p.m.**
 - *Promoting learning from a program perspective
Hosted by Paul Putman, The Cleveland Foundation*
 - *Management of multiple grants getting you down?
Hosted by Victoria Dunning, The Global Fund for Children*
 - *How networked investments may be altering your organizational reality
Hosted by Angela Fruscante, William Caspar Graustein Memorial Fund*
 - *Current trends in nonprofit capacity building
Hosted by Joann Ricci, Greater New Orleans Foundation, and Barbara Kibbe, S. D. Bechtel, Jr. Foundation*
- **Option 3: Meet with colleagues you were hoping to see at the conference.**



4:00 P.M. – 7:00 P.M. FAIL FEST AND EVENING RECEPTION

Concerto A and B

Session Designers: Heather Peeler, GEO, and Wayan Vota, Kurante

There is universal recognition about the importance of learning from our failures, yet rarely do we take advantage of opportunities to do so. We have all failed at something: Site visits gone awry, disastrous miscommunication with grantees, evaluations that spiral out of control, strategic initiatives that lead us to be un-strategic, and more. Storytelling events focused on failure have sparked revolution within the World Bank and other aid organizations, leading them to embrace and learn from failure. Using a similar model, this high-energy session will celebrate failure as a mark of innovation, risk-taking and learning. Join your peers for a lively reception filled with cheerful camaraderie, good food and drinks. Also, hear stories from some of your peers of their favorite failures and how they learned to embrace humility, affirm the value of taking risks and be honest about learning from mistakes.

Presentations begin at 4:45 P.M.

Presenters:



*Kathleen Enright,
GEO (emcee)*



*Suzanne Walsh,
Bill & Melinda Gates
Foundation*



*Michael Maness,
John S. and James L.
Knight Foundation*



*Rafael López,
The Annie E.
Casey Foundation*



*Courtney Bourns,
The Henry P. Kendall
Foundation*



*Ted Chen,
Margaret A.
Cargill Foundation*

7:00 P.M. DINE AROUNDS

Off-site

Join a group of your colleagues for dinner and conversation at a local Miami restaurant to debrief about conference sessions and carry on the day's conversations. Florida Philanthropic Network, GEO's local partner for the conference, has coordinated a series of restaurant reservations for participants who would like to sign up to design or join an informal, participant-driven conversation. You can view location options and sign up for a group at the registration desk. Diners should meet in the lobby of the hotel at 6:30 p.m.

TUESDAY JUNE 4, 2013

7:30 A.M. – 8:30 A.M. NETWORKING BREAKFAST

Symphony Ballroom I and II

Enjoy a breakfast buffet as you network with other conference participants and carry on the conversation from the previous day's sessions.

8:30 A.M. – 10:00 A.M. BREAKOUT SESSIONS ROUND A

A1

Building the Collective Capacity of Grantees for Learning

Concerto B

Session Designer: Matt Forti, The Bridgespan Group

More and more, grantmakers are exploring ways to build grantees' capacity for learning. Some have found success in engaging a range of partners to work with a cohort of grantees in designing and implementing evaluations, collecting data in real-time, facilitating the use of data to extract learning and inform decisions, and more. Join an interactive session to explore examples of this collective approach when used in different contexts — from geographically-based cohorts to those implementing a shared program model to those addressing a similar advocacy issue — with the common thread that evaluation is in service of grantee learning, not grantmaker accountability. Participants will be invited to share examples and generate a set of best practices for the field.

Presenters:

Nancy B. Csuti, The Colorado Trust

Matt Forti, The Bridgespan Group

Nancy MacPherson, The Rockefeller Foundation

A2

Adding It All Up and Learning from the Portfolio

Tenor

Session Designer: Jessica Mancini, The David and Lucile Packard Foundation

Most grantmakers support many grantees that individually are seeking to address a community need or solve a persistent problem. But often the diversity of grants and organizations makes it difficult for funders to assess results across grants and portfolios. Join this interactive session where speakers share their approaches, challenges and successes in learning from their portfolios through brief, five-minute presentations, followed by round table discussions where you can engage more deeply with speakers and fellow participants.

Presenters:

Phillip Chung, The Colorado Trust

Victoria Dunning, The Global Fund for Children

Melissa Extein, American Jewish World Service

Casey Johnson, GreenLight Fund Bay Area

Melody Keim, Lancaster County Community Foundation

Jessica Mancini, The David and Lucile Packard Foundation

A3

Making the Right Evaluation Choices for Your Organization

Concerto A

Session Designer: Lester Baxter, The Pew Charitable Trusts

Your foundation has decided to use evaluation as an approach to promote learning and improve program performance. Now what? The number of approaches and choices in evaluation are dizzying. Which approach will work for your foundation? How will you fund and staff evaluations? How will you decide what to evaluate and when? How can you cut through the hype and jargon to determine which approach is most appropriate for your organization and your grantees? This interactive session will help participants consider how to use evaluation for learning in light of their and their grantees' capacities, resources and organizational cultures.

Presenters:

Lester Baxter, The Pew Charitable Trusts

Angela Frusciante, William Caspar Graustein Memorial Fund

Tom Kelly, Hawai'i Community Foundation

Rebekah Levin, Robert R. McCormick Foundation

Ehren Reed, Skoll Foundation

BREAKOUT SESSIONS ROUND A CONTINUED

Tuesday, June 4

A4

How Networks Learn

Picasso

Session Designers: Marianne Hughes, Interaction Institute for Social Change, and Pat Brandes, Barr Foundation

Over the past several years, grantmakers and practitioners are paying more attention to how networks learn from their work and improve their practice as a result. What differentiates learning from information sharing? What are the conditions that enable learning? What are the inflection points in network development that catalyze learning? In this interactive session, participants will deepen their understanding of the “network mindset,” the need to create disruptions and allow for emergence, the role of data and information in network learning and how networks improve upon their practice as a result. Using case studies, participants will look at the learning needs and modalities that are specific to a particular type of network and those that are common across all networks.

Presenters:

Rahn Dorsey, Barr Foundation

Marianne Hughes, Interaction Institute for Social Change

10:30 A.M. – 12:00 P.M. BREAKOUT SESSIONS ROUND B

B1

Breakthrough Strategies to Create a Meaningful Learning Environment

Concerto B

Session Designer: Rosanna Tran, California HealthCare Foundation

Foundation staff members responsible for leading organizational learning initiatives are taking creative approaches to fostering a culture of inquiry and incorporating reflection into the everyday work. One foundation is using an internal learning community as a formative evaluation tool and opportunity to help program officers redefine their roles within a new grantmaking strategy. Another is applying crowdsourcing and other ground-up techniques to build buy-in and engagement for learning. Yet another grantmaker is developing annual learning agendas to guide learning efforts. Through an interactive interview format, participants will explore the distinct approaches of three funders to foster learning among foundation staff, as well as anticipate challenges and opportunities in their own learning work moving forward.

Presenters:

Fatima Angeles, The California Wellness Foundation

Allison J. R. Metz, The Kate B. Reynolds Charitable Trust

Rosanna Tran, California HealthCare Foundation

 Topics are applicable to representatives of small foundations.

B2

Putting Evidence-Based Grantmaking into Context

Picasso

Session Designer: Cindy Eby, Mile High United Way, and Brian Paulson, Greater Twin Cities United Way

Evidence-based grantmaking is growing in popularity in government and private philanthropy. These changes have numerous implications for grantmakers in light of new pressures being placed on grantees and may signal a need for a shift in the power dynamic of funding. Through dynamic conversation among speakers and participants, this session will explore the context for evidence-based grantmaking at the federal and local level, and the need for impact evaluation in situations where rigorous approaches to evaluation fail to yield desired results or don't go as planned.

Presenters:

Jon Baron, Coalition for Evidence-Based Policy

Gary Chapman, Communities in Schools

Cindy Eby, Mile High United Way (co-facilitator)

Brian Paulson, Greater Twin Cities United Way (co-facilitator)

B3

Who Cares? Audience-Driven Strategies for Communicating Impact

Tenor

Session Designer: Jon Sotsky, John S. and James L. Knight Foundation

Foundations invest significant time and resources analyzing their impact and gathering insights. The process often culminates with posting a static report on a website so "the field" can learn, but rarely do foundations strategically communicate findings to relevant audiences like grantees, policymakers, the public, peer funders and their own staff. Using a lightning-round format, this session will showcase foundations that have experimented with new approaches to communicating impact and the lessons learned along the way.

Presenters:

Josie Heath, The Community Foundation of Boulder County

Kimberly James, W.K. Kellogg Foundation

Debra Pérez, Robert Wood Johnson Foundation

Kevin Rafter, The James Irvine Foundation

Jon Sotsky, John S. and James L. Knight Foundation

BREAKOUT SESSIONS ROUND B CONTINUED

Tuesday, June 4

B4

Removing the Roadblocks to Learning

Concerto A

Session Designer: Tanya Beer, Center for Evaluation Innovation

Foundations have been working long and hard to improve learning practices, but we often don't pay attention to one critical element of the learning equation: the cognitive processes involved in how people and groups think and make decisions. Decades of research have demonstrated that despite our best intentions, we don't often operate as rational beings. Particularly in complex and uncertain situations, we tend to fall into "cognitive traps," relying on mental shortcuts that prevent effective learning and lead to bad decisions. This highly interactive session will diagnose and problem solve for common cognitive traps in grantmaking.

Presenters:

Tanya Beer, Center for Evaluation Innovation

Julia Coffman, Center for Evaluation Innovation

Roberto Cremonini, Cremonini Consulting Network

Joshua Joseph, The Pew Charitable Trusts

Veronica Olazabal, The MasterCard Foundation

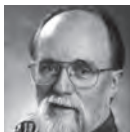
Dan Wilson, Ontario Trillium Foundation

12:00 P.M. – 2:00 P.M. CLOSING PLENARY LUNCHEON

Real Learning in Real Time

Symphony Ballroom I and II

Far too often, we approach learning as a static, cognitive exercise where we passively absorb data and information. Grantees submit reports, evaluations are conducted and trustees are updated and briefed. In this day and age, that approach is fast becoming obsolete — at best it slows or delays meaningful adjustments to our work; at worst it can render our grants and initiatives irrelevant. Michael Quinn Patton, renowned expert on learning and evaluation, will offer a different possibility for real learning, in real time. Using examples and a model for practicing learning, this interactive session explores what can happen when learning is infused with a clear sense of purpose and intent, quality information and meaningful action. Participants will share their learning journeys at the conference, discuss with peers what they had hoped to learn, what they learned and what actions they plan to take when they return home.



Speakers:

*Michael Quinn Patton,
independent consultant*



*Rebekah Levin,
Robert R. McCormick
Foundation
(introduction)*



*Kathleen Enright, GEO
(concluding remarks)*

Advanced registration and an additional fee are required for workshops.

W3 **Developmental Evaluation:
What Are You Ready to Do?**

Concerto B

Facilitators: Hallie Preskill and Srikanth Gopalakrishnan, FSG

Developmental evaluation is a flexible approach to evaluation where processes of asking questions, applying logic and gathering and reporting data are used to support real-time decision making regarding a program, project or initiative. However, using evaluation to support learning and continuous improvement is easier said than done. This session goes beyond the basic introduction to developmental evaluation and prepares participants to create the conditions for successful implementation and embrace emergent, adaptive and learning-focused approaches to evaluation. Led by Hallie Preskill, an evaluator with expertise in developmental evaluation, participants will discuss the readiness factors and conditions for successful developmental evaluation. Through structured conversation with peers, participants will reflect on past successful evaluation experiences, create a vision for the future, and develop a set of action steps for creating the policies, practices, and structures within their organizations.



QUESTIONS FOR REFLECTION

Be a better learner! Evidence shows that those who set learning goals and are intentional in their learning are better at it. Use the questions below to activate your learning at The Learning Conference 2013. They are designed to help you craft your personal roadmap for discovery and knowledge building. Bring your answers to the closing plenary.

QUESTIONS TO ASK YOURSELF ON DAY ONE:

- 1. What do I expect to learn at The Learning Conference 2013?*
- 2. What questions am I bringing to the conference?*
- 3. What will I do at the conference to support my own learning?*

QUESTIONS TO ASK YOURSELF ON DAY TWO:

- 1. What did I learn at the conference thus far?*
- 2. What will I do differently as a result of what I learned?*
- 3. What new questions have emerged for me?*



Grantmakers for Effective Organizations challenges the status quo in a field often resistant to change.

In a changing world where the old rules of philanthropy no longer apply, we help grantmakers keep pace by connecting them with innovative answers to field wide challenges. GEO is a community of nearly 3,700 individuals representing more than 425 grantmaking organizations that are committed to supporting more efficient and effective nonprofit organizations.

We help grantmakers improve practices in areas that have been identified as critical to nonprofit success: learning for improvement, collaborative problem-solving, funding outcomes, stakeholder engagement and *Scaling What Works*. Throughout the year, GEO's members ask tough questions, offer cutting-edge ideas and share examples of what works (and what doesn't) in philanthropy.

Sustain the momentum and share the energy from this conference with your colleagues through access to hundreds of philanthropy-related resources and publications from GEO and partners, peer-to-peer problem-solving opportunities, online resources, conferences, and so much more.

Not yet a GEO member? Join the GEO community today!

Contact us at membership@geofunders.org or 202.898.1840 to receive a 10 percent discount off your first year of GEO membership. Offer valid for a limited time.

Save the date for these upcoming GEO conferences:

Supporting Movements:

A grantmaker gathering on collaborative approaches for social change

November 18 – 19, 2013

Washington, D.C.

Registration opens Sept. 4.

2014 National Conference

March 10 – 12, 2014

Los Angeles, Calif.

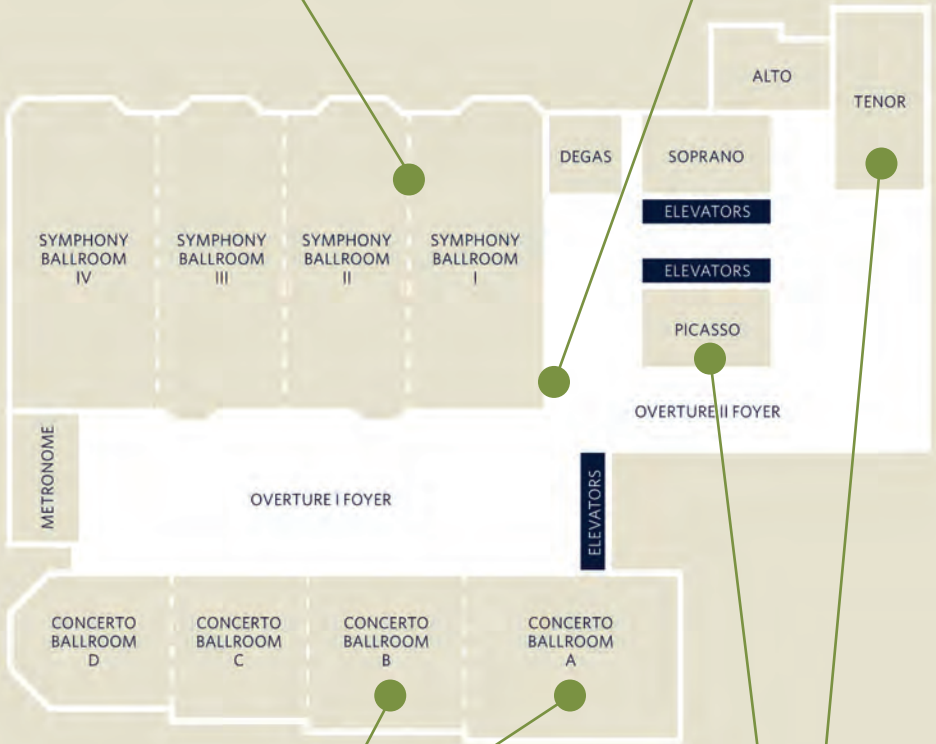
Registration opens in November.



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