Forum Network Annual Conference
July 21 – July 23, 2015
Hotel Monaco, Baltimore

Monday, July 20

6:30pm  Joint Forum Board & RA CEO Dinner (Off-site)
Sponsored by Venable LLP
Venable LLP, 750 E. Pratt Street, Suite 900, Baltimore, MD 21202

Tuesday, July 21

8:00am  Registration Opens
Paris Foyer

9:00-10:00am  Pre-Conference Session: New CEO Orientation
Athens North

10:00am-4:30pm  Pre-Conference Session: RA CEO Summit
Athens North
Join your fellow CEOs for a day of learning, sharing, and brainstorming. Get to
know your colleagues, explore issues of common interest, and help chart the
future of our network.

11:00am-12:00pm  Pre-Conference Session: New Staff Orientation
Paris South
During this session you’ll test your knowledge about the Forum Network, hear
from a regional association staff member about the value of the network, and
spend time getting to know your new fellow colleagues.

12:30-5:00pm  Pre-Conference Session: RA Staff Summit and Job Alikes
Lunch in Vienna North & Session Continues in Paris
The power of the Forum Network is the expertise, insight, and advice that is
shared among the 250+ staff nationwide. But while listserve discussions and
phone conversations are useful, there is nothing like meeting face-to-face with
the only people who really understand the work that you do every day. During
this extended session you will get to know your colleagues as more than just
voices on a conference call!

Jennifer Sweeney, Waverly Consulting & Coaching Group, will lead an interactive
leadership development workshop and we’ll close with one of the most popular
features of our conference, job alikes! These roundtable discussions organized
by key topics in RA operations will allow you to dig deeper into the challenges
and opportunities you face on a daily basis and share tools, resources, and
lessons learned.
5:30-7:00pm  **Opening Reception (Off-site)**  
**Supported by Annie E. Casey Foundation**

**Roof Top Bar, Oriole Park at Camden Yards (Eutaw St, Gate H)**
Catch-up with old friends and make new ones over drinks and light hors d’oeuvres at our opening reception with views of the field. Tours of the stadium will also be available. Walking directions are available at the registration desk.

7:30pm  **Dine Arounds**
Sign-up at the registration table.

**Wednesday, July 22**

7:00am  **Registration Opens**  
**Paris Foyer**

7:30-8:30am  **The Skills to Pay the Bills: Boosting Nonprofits’ Financial Management (Sponsored by The Wallace Foundation)**  
**Athens South**

What does it take for funders to boost nonprofit capacity through training, and is it possible for any gains to last? The Wallace Foundation explored these questions through a multi-year investment in Chicago that sought to boost the financial management capacity of 25 non-profit afterschool providers. Join us for breakfast and bring this knowledge back to your members interested in strengthening the financial management capabilities of the nonprofits they fund.

The training was provided by Fiscal Management Associates; Child Trends and MDRC conducted an independent evaluation to measure impact. This was complemented by work by the Donors Forum to improve collaboration among nonprofits, public and private funders, and policymakers in Illinois. You will hear from Hilda Polanco, CEO and founder of Fiscal Management Associates; Polly Singh, Program Officer of The Wallace Foundation; and Dr. Karen Walker of Child Trends, co-author of the resulting report, *The Skills to Pay the Bills: An Evaluation of an Effort to Help Nonprofits Manage Their Finances*.

8:00-9:00am  **Breakfast & Networking Roundtables: The Kitchen Sink**  
**Vienna North**

Join us bright and early for roundtable discussions focused on hot topics and collaborative initiatives in the field.

- Essentials of Creating Best-in-Class Corporate Community Involvement Programs *Sponsored by Changing Our World*
- Dealing With Difficult Employee Situations (While Keeping Your Sanity) *Sponsored by HR Strategy Group*
- Organizing around a Shared Result: How Regional Associations Can Support Collective Action on Grade-Level Reading
- Nonprofit Effectiveness through Technology Support
- Foundations + #GivingTuesday: Explore the Role of Foundations in the Global #GivingTuesday Movement
- Community Problem Solving: Connecting Possibilities
- What’s In a (RA) Name?
9:15-9:30am  Welcome Remarks & Introductions  
Paris

9:30-10:15am  Philanthropy's Response to Community Anger & Injustice  
Paris
Moderator: Paul Daugherty, Philanthropy West Virginia  
Presenters: Celeste Amato, Association of Baltimore Area Grantmakers;  
Deb Dubin, Gateway Center for Giving; Heather Iliff, Maryland Nonprofits

In the past year, two controversial events taking place in Ferguson, MO and Baltimore, MD have both reignited and surfaced issues relating to equity, justice, and race. During this conversation we will discuss the role philanthropy is playing to impact these social issues now and into the future.

10:15-11:45am  Opening Keynote  
Paris
Presenter: David Grant, The Social Profit Handbook  
Moderator: Nina Stack, Council of New Jersey Grantmakers  
Panelists: Jeff Clarke, Philanthropy Northwest; Tamara Copeland, Washington Regional Association of Grantmakers; Trista Harris, Minnesota Council on Foundations

David Grant will discuss his book, "The Social Profit Handbook," which offers those who lead, govern, and support mission-driven organizations and businesses new ways to assess their impact in order to improve future work rather than merely judge past performance. Nina Stack will then moderate a discussion with regional association leaders about the book, their key takeaways, and potential changes to how their organizations assess impact.

11:45-12:00pm  Break  

12:00pm-1:15pm  Lunch & Annual Meeting  
Paris
Learn more about the Forum Network’s work this past year and vote for the new slate of board members and officers.

1:15pm-1:30pm  Break  

1:30-3:00pm  Breakout Sessions  
Maximizing the Learning Potential of Your Programs  
Athens North
Speaker: Frank Richard Di Silvestro, Indiana University

Structuring effective professional development programs involves understanding the adult learning process. This session will outline the six principles of adult learning and discuss how you can effectively structure programs to maximize learning. We will discuss program formats (electronic vs. in-person), program structure (single session vs. developing a curriculum) and ways to enhance your members' internal motivation to learn.
Data: The Promise, the Practice, and the Pitfalls (Sponsored by Fund Evaluation Group)

Vienna North

Moderator: Kristen Holway, Philanthropy Northwest
Presenters: Karen Freeman, Southern California Grantmakers; Trista Harris, Minnesota Council on Foundations; Larry McGill, Foundation Center; Rebekah Seder, Washington Regional Association of Grantmakers

From the Get on the Map campaign to stunning infographics to public policy efforts at Foundations on the Hill, data has become an essential element of how we tell the story of giving in our regions. In this session, you will hear from RA leaders who have wrestled with how to gather data and spot trends. They will share their experiences and insights to help you think through how your regional association can better use data to engage and inform your members. Kristen Holway of Philanthropy Northwest will lead a conversation with regional association staff members to discuss the why and how of their data projects, the value of partnership with Foundation Center and other data brokers, the pitfalls of going it alone, and the promising future of regional associations as data collectors, disseminators, and storytellers.

3:00-3:30 pm

Break (Sponsored by ThinkShout)
Mingle with other attendees as you make your own trail mix to fuel the rest of your day.

3:30-6:00 pm

Collaborations in the Field: Partnership Hub & Mini-Sessions

Partnership Hub in Paris and Mini-Sessions in Vienna North, Athens North and Athens South (see your packet for further information)
The philanthropic infrastructure field includes many different players from regional associations of grantmakers, affinity groups, and other national leadership groups. We see great potential to increase how our different organizations share resources, partner on projects and events, and build a stronger philanthropic sector. This extended afternoon session will feature a Partnership Hub for one-on-one conversations and a series of 20 minute Mini-Sessions to spotlight innovative work in the field and spark ideas for greater collaboration among all the organizations serving philanthropy. Sign up for conversations in the Partnership Hub at the registration desk.

6:30 pm

Social Events (Optional)
Check your registration packet for further information
Thursday, July 23

8:00-9:00am  
**Share Your Story: It's Been A Long Year Without You My Friends, Let Me Tell You All About It Now that We’re Here Again**  
Vienna North  
Come together with your regional association peers over breakfast to share your RA’s best practices and lessons learned of the past year.

1. What is the biggest challenge faced by your RA in the past year? How did you solve it?
2. What has been your best strategy for recruitment and securing new membership growth?
3. Is there a program that you have recently retired or quit doing? Why?
4. How do you gather feedback from members? What trends are you hearing about what’s working and what’s not?

9:00-10:30am  
**Breakout Sessions**

**50 Shades of Engagement**  
Athens North  
*Facilitators: Sarah Mann Wilcox, North Carolina Network of Grantmakers and Craig Weinrich, Council of New Jersey Grantmakers*

Actually, with 33 regional association members and more than 5,500 organizations to serve, there are probably a lot more than “50 shades” of engagement and tracking tools. Ask your questions, share your challenges, and bring your ideas (the crazier, the better!) to share during this facilitated discussion. We know you'll walk away with more than one new technique to please your members and have them asking for more.

**Regional Associations Advancing Issues at the Core of All Philanthropy**  
Paris North  
*Moderator: Kelly Brown, D5  
Presenters: Delia Coleman, Donors Forum; Audrey Haberman, Philanthropy Northwest; Theresa Jackson, Philanthropy Network Greater Philadelphia*

Whatever the issue or approach, employing a diversity, equity, and inclusion (DEI) lens enables grantmakers to enhance their impact as DEI issues are at the core of all philanthropy. Many regional associations have taken leadership roles in initiating and sustaining efforts to bring a DEI lens to programming, member activities, and leadership. This session will explore what regional associations have done in this area and some of the lessons learned, including how DEI work enhances the leadership role of regional associations, how all programs and issues touch on DEI, tools for applying a DEI lens, and the benefits to members.

10:30-10:45 am  
**Break**
10:45am-12:15pm **Breakout Sessions**

**The Future of Digital Engagement for Associations: 5 Web Trends to Follow**  
*Vienna North*  
*Presenter: Sean Larkin, ThinkShout*

Web technologies move fast, but recently we've seen the rise of a handful of new trends in digital storytelling, online engagement strategy, design, and technology that appear to be here to stay. In this session we will discuss these trends to help your organization stay ahead of the curve and future-proof your online communications investments.

**Philanthropic Investing for Social Innovation**  
*Athens North*  
*Presenters: Melanie Audette, Mission Investors Exchange; Gretchen Greiner-Lott, Washington Regional Association of Grantmakers; Debbie McKeon, Council of Michigan Foundations; and Laura Tomasko, Policy Advisor, Office of Social Innovation and Deputy Associate Director for Public Engagement, Council on Environmental Quality*

We are experiencing a dramatic change in the practice of philanthropy, including the tremendous growth and interest among foundations in employing a wide range of financial strategies to achieve their philanthropic goals. How are regional associations both taking a leadership role in impact investing and equipping themselves to be responsive to members’ questions and needs? This session will provide a brief overview of impact investing from the national perspective, along with specific examples of how regional associations are approaching this work with their membership. In direct response to Forum member surveys, the session will also touch briefly on pay for success, investing in social entrepreneurship, and mission investing to complement your grantmaking. You will leave the session with resources and ideas to help you continue the learning both on your staff and on behalf of your members.

12:30-2:00pm **Plenary and Lunch: The Role of Philanthropy in Shaping Public Policy and Building Diverse Movements for Equality**  
*Paris*  
*Presenter: Teresa Younger, Ms. Foundation for Women*

Ms. Foundation for Women President and CEO Teresa C. Younger just concluded a yearlong listening tour, having met with activists, nonprofit directors, funders and philanthropists across the country to discuss building movements for women’s empowerment and equality. She will share insights from her tour and strategies for philanthropic organizations to promote diverse, inclusive movements. Younger also will discuss the unique role philanthropy can play in promoting progressive public policies.

2:00pm **Drupal-Salesforce Users Group Session**  
*Athens North*

2:00pm **PolicyWorks for Philanthropy Institute**  
*Vienna North*
A special thanks to all of our sponsors!

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