

SEPTEMBER

16


17

18


Philanthropy  
**forward**'15

The Westin  
Cincinnati Hotel

#PhilFWD15

A portrait of Paul Schmitz, a man with a beard and glasses, wearing a suit and a purple bow tie. He is smiling and looking slightly to the right of the camera. The background is a blurred bookshelf.

**Paul Schmitz**  
Leading Inside Out  
*Everyone Leads*

A portrait of Kelly Brown, D5, a woman with long, dark, wavy hair. She is smiling and looking directly at the camera. She is wearing a dark top and red earrings.

**Kelly Brown, D5**  
*Fueling a Movement  
for Diversity, Equity  
& Inclusion*

A portrait of Carol Coletta, a woman with short, blonde hair. She is smiling broadly and looking directly at the camera. She is wearing a grey top and large, round, black and white earrings.

**Carol Coletta**  
Knight Foundation  
*Civic Innovation*

# WEDNESDAY

# 16

2:00 – 4:30 PM

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## Smarter Grantmaking

Learn how to shift your work to achieve greater alignment between values and practice, supporting better results for the nonprofits and communities you support. Explore research from GEO's recent field study about the grantmaking practices that support nonprofit success and examples that shed light on what it takes to "live your values."

**PRESENTER:** Heather Peeler, Grantmakers for Effective Organizations

## Financial Market Outlook

This overview of key macroeconomic and financial market topics includes a discussion of important market dynamics and timely, actionable research. Following the overview are Investment Roundtables with leading professional advisors focused on successful endowment management topics like alternative investments, managing your managers and more.

**PRESENTERS:** Mark J. Rogers and Gary W. Jbara, Morgan Stanley

## Donor Development Deep Dive

Learn how to increase your foundation's discretionary funds, compete with for-profit donor advised funds and engage younger donors in this deep dive session that will equip you to conduct effective discovery and cultivation visits. Gain solid take-aways and practical experience that you can apply to your work.

**PRESENTER:** Michelle L. Janssen, CFRE, Wabash College

**SPONSOR:** Plentiful

6:00 PM

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## Oktoberfest Welcome Party

Visit the 21 C Museum Hotel for a lively celebration showcasing the rich German heritage of southwest Ohio, featuring German-style music, food and beverages. Herren und frauen (ladies and gentlemen) will gather to eat, sing, mingle, sport lederhosen, listen to polka music, try to speak German and perform the Chicken Dance!

**HOST & SPONSOR:** Frau Heidi Jark, Fifth Third Foundation

**LOCATION:** 21 C Museum Hotel, 609 Walnut St., Cincinnati, Ohio



Read more about our conference sessions and speakers online at [PhilanthropyForward.org](http://PhilanthropyForward.org).

# THURSDAY 17

7:30 – 8:30 AM **Breakfast** —————

8:30 – 9:30 AM **Opening Plenary** —————

## **Everyone Leads**

Consider new leadership possibilities within yourself and community while exploring leadership development and community-building strategies necessary to develop authentic, inclusive and collaborative leaders who work better together and engage community members to solve community problems.

**PRESENTER:** Paul Schmitz, Leading Inside Out

**SPONSOR:** The Greater Cincinnati Foundation

9:45 – 11 AM —————

## **Funders Addressing Opiate & Heroin Addiction**

Learn how Cincinnati funders are building an ambitious collaboration to address the heroin/opiate epidemic in their community. Hear about the extent and nature of Ohio's problem and the coalition's approaches and lessons learned to date.

**PRESENTERS:** Tara Britton, Center for Community Solutions; Ann Barnum and Kate Keller, Interact for Health; Ross Meyer, United Way of Greater Cincinnati; Molly Robertshaw, The Greater Cincinnati Foundation

## **Invest with Impact**

Learn how foundations align social and environmental values with their investments, without sacrificing performance. Explore ways to invest with impact across all asset classes and how to create a plan to incorporate social and environmental considerations in your investment policy.

**PRESENTERS:** Mark J. Rogers and Gary W. Jbara, Morgan Stanley; Liz Michaels, Aperio Group; David F. Sand, Community Capital Management

## **Creative Chops for Creating Change**

Leave this fun, highly-interactive session with a working understanding of the concepts and tools needed to apply a human-centered design mindset to your work. Learn how design thinking drives results and how to apply these skills in the philanthropic sector to help drive community outcomes, walking away invigorated, informed and with a resource toolkit.

**PRESENTERS:** Michael L. Baker, United Way of Greater Cincinnati; Ramsey Ford and Kate Hanisian, Design Impact

## **Collective Impact**

Learn how to build the culture of Collective Impact by leading in ways that allow for more honesty, vulnerability and the ability to work through power dynamics and turf issues.

**PRESENTER:** Paul Schmitz, Leading Inside Out

11:15 AM – 12:30 PM —————

## **Focus on College Completion**

Learn how two funders, a community college and the Ohio Board of Regents, came together to increase college completion rates in the ASAP Replication Project at Cincinnati State. Examine the role of evidence and evaluation in scaling and sustaining programs and informing funding decisions.

**PRESENTERS:** Anne Foster, Cincinnati State Technical and Community College; Amy Kerwin, Great Lakes Higher Education Guaranty Corporation; Helen Mattheis, The Greater Cincinnati Foundation; Brett Visger, Ohio Board of Regents

## **Criminal Justice Reform**

Examine how philanthropy, policy experts and community organizations are working together to address the social and economic issues at the heart of criminal justice reform in Ohio. Hear how The Transformation Fund will engage donors and funders as awareness of both the causes and consequences of mass incarceration has moved into action.

**PRESENTERS:** DaMareo Cooper, Ohio Organizing Collaborative; Marcia Egbert, The George Gund Foundation; Stephen Johnson Grove, Ohio Justice and Policy Center; Kirsten Levingston, Ford Foundation; Mary Sobecki, The Needmor Fund

## **Fear Not the Board Meeting**

Explore easy-to-use tools and learn tips and tricks to help you get the most out of your board meetings. Discuss a unique approach to board self-reflection that shows how to use standing committees to maximize board engagement; bring your nagging issues and success stories to share.

**PRESENTER:** Leslie Dunford, The Cleveland Foundation

## **Building Cross-Sector Partnerships for Systems Change**

Learn about two collaborative workforce development efforts in Northeast Ohio, supported by a collaboration of funders. Examine how to build and sustain a complex, cross-sector collaboration.

**PRESENTERS:** Bethia Burke, Fund for Our Economic Future; Courtney Howard Hodapp, JP Morgan Chase Foundation; Rebecca Kusner, Towards Employment

12:30 – 1:45 PM **Lunch Plenary** —————

### **Fueling a Movement for DEI**

Kelly Brown shares lessons learned over D5 Coalition's five-year effort, focusing on how change happens in philanthropy and opportunities for engaging in the growing network of champions advancing diversity, equity and inclusion in philanthropy.

**PRESENTER:** Kelly Brown, D5

1:45 – 2:15 PM **Dessert Networking Break**

2:30 – 3:45 PM —————

### **Social Impact Investing**

Consider innovative ways to create impact in your community by embracing social impact investing. Learn how a traditional private foundation evolved to setting a goal of aligning 100% of its assets with its mission, hearing about some of the tools and approaches a foundation can use.

**PRESENTERS:** Patrick Westerlund and Tony R. Wells, Tony R. Wells Foundation

### **Gender Transformative Grantmaking**

Learn about gender norms – what they are, how they impact our lives and how they apply to grantmaking. Explore how understanding, addressing and challenging rigid gender norms in our communities can impact outcomes in education, health care and more.

**PRESENTERS:** Beth Morrow Lonn, The Women's Fund of Central Ohio; Riki Wilchins, True Child

### **Advancing DEI**

Philanthropy Ohio members share dynamic stories that illustrate the rewards of diversity, equity and inclusion efforts, in terms of impact, effectiveness and transformation.

**PRESENTERS:** Kelly Brown, D5; Meghan Cummings, Women's Fund of The Greater Cincinnati Foundation; Shayne Downton, United Way of Central Ohio; Tim Harris, Community Foundation of Lorain County; Mary Sobecki, The Needmor Fund; Lorraine Vega, KeyBank Foundation

2:30 – 5:00 PM —————

### **Learning Tours**

Visit a school-based health and dental center to see how funders collaborate to make a difference in the lives of Cincinnati's children and teens. Then learn how Collective Impact in Price Hill brings people together to tackle the community's most pressing problems.

**HOSTS:** Interact for Health and Local Initiatives Support Corporation

Explore People's Liberty, an 8,000 square foot philanthropic lab that brings together civic-minded talent to address challenges and uncover opportunities to accelerate positive community transformation. Funders, staff and grantees will introduce innovative tools and techniques you can use.

**HOST:** The Carol Ann and Ralph V. Haile, Jr./U.S. Bank Foundation

### **Excellence in Employee Engagement**

Learn how three different employee engagement efforts increase morale and provide opportunities for professional development, leadership and a personalized connection to a company's philanthropic mission. Discuss methods and models for facilitating volunteerism and reflect on different corporate social responsibility models.

**PRESENTERS:** Jennifer Prichard, JPMorgan; Karen A. White, KeyBank Foundation; Kelly Dolan, Ingage Partners

4:00 – 5:15 PM —————

### **Testing with Private Dollars, Scaling with Public Funds**

Learn how a new approach uses a venture capital model to seed projects to test reliability and then capitalize those projects to take them to scale. Explore how to apply Agency-Based Modeling to develop a portfolio of high-impact, highly-reliable interventions to better leverage your investments.

**PRESENTERS:** Leslie Maloney, The Carol Ann and Ralph V. Haile, Jr./U.S. Bank Foundation; Greg Landsman, Strive Partnership

### **Using A Gender Lens to Get Better Results**

Explore how a gender lens can be a successful way to reach donors and how it can effectively address issues like poverty, self-sufficiency and job training.

**PRESENTER:** Meghan Cummings, Women's Fund of The Greater Cincinnati Foundation

### **A Funder's Guide to Racial Equity**

How can foundations work most effectively in efforts to achieve equity in their grantmaking? Explore challenges and opportunities as you learn about promising practices and tools to deepen discourse and strategies within your institution and community.

**PRESENTERS:** Mary Sobecki, The Needmor Fund; Lori Villarosa, Philanthropic Initiative for Racial Equity

6:00 PM —————

### **Dine Arouds**

8:00 – 9:00 AM

**Breakfast and Annual Meeting**

9:15 – 10:30 AM

**Collective Impact through Medical-Legal Partnerships**

Learn how public/private partnerships between civil legal aid, local children's hospitals and funders leverage resources to overcome social determinants of health and ensure children get the holistic care they need.

**PRESENTERS:** Mary Asbury, Legal Aid Society of Greater Cincinnati; Lee Ault Carter, Cincinnati Children's Hospital; Robert S. Kahn, MD, MPH, James M. Anderson Center for Health System Excellence; Angela M. Lloyd, Ohio Legal Assistance Foundation

**Succession Planning**

Explore how to help nonprofits plan and prepare for leadership transitions as boomers retire, gaining an understanding about projected transitions and the state of nonprofit preparation. Learn how to evaluate various replacement plans for key management positions.

**PRESENTER:** Executive Service Corps

**Public Policy Nuts & Bolts**

Brush up on your knowledge of what the law allows you to do in the public policy arena. A national expert explains the dos and don'ts of direct lobbying and rules for making grants to support advocacy while colleagues suggest why it's important to engage.

**PRESENTERS:** Erin Skene-Pratt, Skene-Pratt Consulting; Cara Dingus Brook, Foundation for Appalachian Ohio

9:15 AM – Noon

**Collective Impact Master Class**

Explore the methodology and framework of Collective Impact and its power to transform communities. Case studies demonstrate how Collective Impact has built and sustained systemic change in Cincinnati, with insight offered into the role of funders and key partners in advancing Collective Impact along with concrete actions you can take.

**PRESENTERS:** Mary Stagaman, Cincinnati USA Regional Chamber and Agenda 360; Shiloh Turner, The Greater Cincinnati Foundation

**Ohio's Economic Development Grantmaking**

Develop an understanding of economic development grantmaking in Ohio and gain insights into philanthropic investment tools used to fund economic development activities.

**PRESENTERS:** John P. Bailey, Ph.D., Foundation Center-Cleveland; Denise Griggs, Burton D. Morgan Foundation; Robert B. Jaquay, The George Gund Foundation; Robert Killins Jr., The Greater Cincinnati Foundation; Douglas Kridler, The Columbus Foundation; Molly Schnoke, Cleveland State University; Brad Whitehead, The Fund for Our Economic Future

10:45 AM – Noon

**Millennials as Donors**

Learn about the charitable behaviors of today's younger generations and how to attract and engage younger donors while unpacking data from various sources.

**PRESENTER:** Erin Scott, Generate Consulting Group

**All Together Now**

Discover how learning and evaluation can be powerful tools to strengthen relationships with grantees and their outcomes. Hear how peers use different strategies for learning with grantees, explore how they put these practices to work and how you can apply insights gained.

**PRESENTERS:** Heather Peeler, Grantmakers for Effective Organizations; Jennifer Roller, The Raymond John Wean Foundation; Deborah Vesey, Deaconess Foundation

**Funder Collaboration for Statewide Policy Success**

Gain a clear understanding of successful funder policy collaboratives, how to avoid common pitfalls and how to spark real change in the public policy arena through funding and leadership, developing capacity and sustainability so that the collaboratives are able to succeed on their own.

**PRESENTERS:** Marcia Egbert, The George Gund Foundation; Margaret Hulbert, United Way of Greater Cincinnati

Noon – 2:00 PM

**Closing Lunch and Celebration****Civic Innovation**

Recognizing the importance of place and engaging leaders and the public are key elements for funders who want to spur innovation and build successful communities. Sharing insights and inspiration gained from her experience in the field, Carol Coletta points out how considering these elements can help attract and retain talent, spur economic development and create a culture of engagement while suggesting roles funders can play. Then, celebrate the contributions of outstanding philanthropists as we present our annual awards.

**PRESENTER:** Carol Coletta, Knight Foundation

**SPONSOR:** The Carol Ann and Ralph V. Haile, Jr./U.S. Bank Foundation

# THANK YOU

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Ralph V. Haile, Jr.



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*An independent family foundation*



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The Athens Foundation  
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## CONFERENCE PLANNING COMMITTEE

Heidi Jark, Fifth Third Foundation, Host Event Chair  
Eric Avner, The Carol Ann and Ralph V. Haile, Jr./US Bank Foundation, Co-Chair  
Shiloh Turner, The Greater Cincinnati Foundation, Co-Chair  
Meghan Cummings, Women's Fund of The Greater Cincinnati Foundation  
Ruby Harper, Greater Columbus Arts Council  
Kate Keller, Interact for Health  
Greg Landsman, KnowledgeWorks  
Kris Putnam-Walkerly, Community Foundation of Lorain County  
Emily Savors, The Columbus Foundation  
Sonya Turner, United Way of Greater Cincinnati

# COSTS

Full Conference	Member Fee	Non-Member Fee
<input type="checkbox"/> Full conference if registered by August 21	\$520	\$725
<input type="checkbox"/> Full conference if postmarked after August 21	\$570	\$775
<input type="checkbox"/> Full conference Multiple Registration Discount	\$470	\$675

To receive the multiple registration discount:

- One person from an organization must first pay the full conference fee.
- Multiple registrations from one organization must be submitted together – use a separate form for each registrant.
- Payment must be postmarked by **August 21**

<input type="checkbox"/> Full conference <b>First-Time Member Attendee</b>	\$470	n/a
<ul style="list-style-type: none"> <li>• First-time conference attendees receive a discount on full conference registration (Philanthropy Ohio members only).</li> </ul>		

## Partial Conference

<input type="checkbox"/> Wednesday ONLY	\$175	\$245
<input type="checkbox"/> Thursday ONLY	\$350	\$490
<input type="checkbox"/> Friday ONLY	\$235	\$330
<input type="checkbox"/> Cleveland Bus to Cincinnati	\$110	\$110



### GET ON THE BUS

Take the bus Wednesday morning from Lakefront Lines Depot in Cleveland to Cincinnati:

- Network with colleagues
- Get work done
- Relax and save money on gas and parking



### LOCATION

The Westin Cincinnati Hotel  
21 East 5th Street, Cincinnati, OH 45202

Reserve your room online at [PhilanthropyForward.org](http://PhilanthropyForward.org) or call 866.716.8108 (group rate \$179) under Philanthropy Ohio Room Block.



### GET THE APP

Download our free Philanthropy Forward '15 conference app from [PhilanthropyForward.org](http://PhilanthropyForward.org) or your smartphone's app store.



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# REGISTRATION



Register online with a credit card at [PhilanthropyForward.org](http://PhilanthropyForward.org) or complete and mail this form with check or credit card information.

## SESSIONS:

*Please select the sessions you will attend.*

### Wednesday, September 16

- Smarter Grantmaking
- Market Outlook
- Donor Development
- Oktoberfest Welcome Party

16

### Thursday, September 17

- 7:30 AM Breakfast
- 12:30 PM Lunch
- 1:45 PM Networking  
Dessert Break

17

### Friday, September 18

- 8:00 AM Breakfast, and  
Annual Meeting
- Noon Closing Lunch

18

## OTHER

- I am a first-time attendee
- Please do not provide my contact information to exhibitors/sponsors

## DATES TO REMEMBER

**Monday, August 17**  
Hotel rate ends

17

**Friday, August 21**  
Early bird registration ends

21

## CONTACT

Name \_\_\_\_\_  
Title \_\_\_\_\_  
Organization \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
Phone \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ Email \_\_\_\_\_

## BILLING

- Check Enclosed  Visa  MasterCard  American Express
- Billing address same as above

Name on Card \_\_\_\_\_  
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<b>TOTAL AMOUNT DUE</b> \$ _____ See COSTS to add total
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## REFUND POLICY

Philanthropy Ohio will refund registration fees, less a \$50 processing fee, for cancellations received before September 4. No refunds are available after that date.

## DIETARY RESTRICTIONS

- Vegetarian  Vegan  Gluten Free  Kosher
- Non-dairy  Diabetic  Other

*If you need any special accommodations, please call 614.224.1344.*

## REGISTER ONLINE

[PhilanthropyForward.org](http://PhilanthropyForward.org) (credit card only)

## FAX REGISTRATION

614.224.1388

## MAIL REGISTRATION

37 W. Broad St., Ste. 800, Columbus, OH 43215

**QUESTIONS?** 614.224.1344