



2019

SAINT LOUIS
MISSOURI

OCTOBER
2-4, 2019

CONNECT**T**



exponent
philanthropy

THE CONNECT CONFERENCE

PUSH YOURSELF TO THINK DIFFERENTLY WHILE BUILDING CRITICAL SKILLS FOR SUCCESS.

Exponent Philanthropy's **CONNECT** Conference is designed specifically for funders with lean operations and a style of philanthropy motivated by personal passion, community needs, and the strong desire for better outcomes. This high-quality program of deep-dive learning sessions will help you maximize your dollars and time for the benefit of the communities and causes you care about.

LEARN SOMETHING NEW, MEET SOMEONE NEW, AND BUILD YOUR COMMUNITY.

The work we do can be isolating. **CONNECT** offers an empowering space to meet other funders and build real, lasting relationships that will serve you well beyond these few days in St. Louis.

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OPENING LUNCHEON PLENARY

FORGING A PATH TOWARD CHANGE

Wednesday, October 2, 12 - 1:30 PM

Now five years after the death of Michael Brown, Jr., Ferguson has come to symbolize U.S. racial strife and inequality. The circumstances surrounding and following Brown's death have sharply defined challenges that demand transformation and raised questions about philanthropy's role. Forward Through Ferguson is carrying on the work of the Ferguson Commission to catalyze St. Louis's efforts toward racial equity. Hear from the organization's co-chairs about the reality of driving sustainable change in the wake of a community crisis and how each of us, as funders, can play a role.

Rebecca Bennett

Co-chair, Forward Through Ferguson



Rebecca Bennett is founder and principal of Emerging Wisdom LLC and its subsidiary, InPower Institute. Emerging Wisdom is a forward-

thinking social enterprise that helps individuals live empowered lives, leaders build impactful organizations, and communities address and resolve public policy issues. Rebecca currently serves as co-chair of the board of Forward Through Ferguson and as Immediate Past Chair of the board of Generate Health (formerly the St. Louis Maternal Child & Family Health Coalition).

Zack Boyers

Co-chair, Forward Through Ferguson



Zack Boyers leads a team at U.S. Bank that makes tax credit investments and loans to finance affordable housing, economic development,

renewable energy, and historic rehabilitation projects throughout the country. He is co-chair of Forward Through Ferguson, serves on the boards of Urban Strategies and Invest STL, and is on the National Advisory Council of Washington University's Brown School for Social Work.

SCHEDULE AT-A-GLANCE

TUESDAY October 1

9:00 AM – 8:00 PM

**Master Juggler
Executive Institute**
(includes dinner)

5:00 – 7:00 PM

Registration Open

WEDNESDAY October 2

8:00 AM – 6:00 PM

Registration Open

9:00 – 11:30 AM

**Next Gen Fellows
Service Project**

10:30 AM – 12:00 pm

Exhibit Hall Open

12:00 – 1:30 PM

Opening Luncheon Plenary
Forward Through Ferguson
featuring Rebecca Bennett
and Zack Boyers

1:30 – 2:00 PM

Dessert in the Exhibit Hall

2:00 – 4:30 PM

CONCURRENT SESSIONS

4:30 – 5:30 PM

Networking Reception

6:30 – 9:00 PM

Dine-Arounds

THURSDAY October 3

8:00 – 9:00 AM

Networking Breakfast

8:30 AM – 6:00 PM

Exhibit Hall Open

9:30 AM – 12:00 PM

CONCURRENT SESSIONS

12:15 - 1:30 PM

Membership Meeting

1:30 – 2:00 PM

Dessert in the Exhibit Hall

2:00 – 4:30 PM

CONCURRENT SESSIONS

4:30 – 5:30 PM

Networking Reception

6:30 – 9:00 PM

Dine-Arounds

FRIDAY October 4

8:00 – 9:00 AM

Networking Breakfast

9:00 – 11:30 AM

**Next Gen Fellows
Book Club**
(2019 Fellows only)

9:00 – 11:30 AM

CONCURRENT SESSIONS

11:45 AM – 1:00 PM

Closing Luncheon Plenary
featuring Deanna Singh

SESSION DESCRIPTIONS

WEDNESDAY, OCTOBER 2

2:00 – 4:30 PM

Creating a Successful Strategic Plan

Philanthropic Leadership

Is the time right for your foundation to develop a new strategic plan? The steps involved in creating a plan may seem intuitive, but they also could be daunting to a leanly-staffed foundation. Gain insight into what makes a successful plan to guide your organization into the future and how to address potential stumbling blocks along the way.

Do We Need to Hire?

Foundation Management

Whether you're a volunteer foundation board member or part of a small staff, it can seem like you're drowning in tasks and paperwork. How do you know if easing the burden is a matter of increasing your efficiency, implementing better technology, or hiring a staff person or consultant? Join a conversation and exploration of staffing and other efficiencies while keeping in mind foundation resources and priorities.

Inviting Community Voices Into Your Philanthropy

Relationship Building

Funders who achieve outsized impact pay close attention to community needs by listening, researching, and building their knowledge. Some are experimenting with an array of ways to invite community members to advise their work or participate directly in grantmaking. Discover how your peers tap into the knowledge and experience of those you partner with and serve.

Journeys to Equity: St. Louis Equity Practices

As part of Exponent Philanthropy's regional Journeys to Equity series, learn diversity, equity, and inclusion (DEI) practices your foundation can adopt in its governance, grantmaking, and operations. Leave feeling inspired by conversations with St. Louis funders and hold yourself accountable by developing a 3-month action plan.

Shifting Markets and Demographics: Is Your Investment Portfolio Keeping Up?

Financial Stewardship

How can you build an investment policy statement and develop best practices to take advantage of bull markets and minimize risk during bear markets? How can you ensure your portfolio and processes reflect your foundation's preferences and priorities? Join investment experts as they share nuanced insights into investment strategies, trends, and best practices to help your portfolio keep pace with a changing environment and better weather market downturns.

This session is geared to those with a working understanding of investments.

Streamline Your Data Collection and Fine-Tune Your Evaluation

Philanthropic Leadership

Reliable, accurate data has the potential to improve every step of the grantmaking process. For funders interested in collecting data, sharing data, and using it wisely, this session is for you.

SESSION DESCRIPTIONS

Better understand the benefits of good data, ways to communicate it, places to find it, and how to streamline your data collection to avoid overburdening nonprofits with data requests. Make better decisions during the grantmaking and evaluation processes.

THURSDAY, OCTOBER 3
9:30 AM – 12:00 PM

1 + 1 = 2 Fund or Not to Fund *Foundation Management*

Nonprofit financials might look like just numbers, but they tell a story. How do you read what's on the page and add it up to a decision to fund or not? Dive into nonprofit financials and learn the basics of assessing the financial condition of grantseekers. We'll also identify ways to engage with grantees and grantseekers in conversations about their financial situation and needs—beyond program grants.

20 Ways to Make a Difference: Leveraging Your Powers as a Lean Funder

Philanthropic Leadership

Your money is just the beginning. Build your awareness of the many assets you can use to make impact in creative, resourceful ways and be responsive to communities'

needs. Learn the secret for unlocking your powers through scanning, listening, and developing your knowledge.

Effective Leadership: Lessons From the World of Improv *Relationship Building*

Building and managing your many relationships is an essential part of philanthropy. But what is the best way to approach these relationships? In an open and safe environment, we'll use improv games to reinforce practices that will strengthen your relationships. Everyone participates—there are no spectators!

Hiring and Evaluating Investment Professionals *Financial Stewardship*

What do you need to know before, during, and after the RFP process? Once you've hired someone to help you manage your investments, how do you evaluate their performance over time beyond simply looking at your returns? This session will examine key considerations and the types of questions that should be asked at each stage of the process as you hire and evaluate an investment professional.

Operationalizing Equity: Creating Practices That Echo Your Values

Equity Practices

Focusing on how funders can evaluate their operations through a lens of equity and inclusion, each participant will explore a series of common foundation scenarios and work with others to build consensus around a decision. Walk away from this simulation-based workshop with a better understanding of how to make values-based decisions.

THURSDAY, OCTOBER 3
2:00 – 4:30 PM

Grantmaking Due Diligence: The Three Pillars of High-Performing Nonprofit Boards *Philanthropic Leadership*

Although governance is an art and not one-size-fits-all, a grantee's board is critical to helping the organization deliver on its mission and goals. Assessing board quality and identifying potential red flags may require greater due diligence by grantmakers. Learn to recognize characteristics of high-performing nonprofit boards and the tools grantmakers can use to ensure their own mission is fulfilled.



Moving Ahead With Advocacy and Policy: A Hands-On Workshop

Philanthropic Leadership

Are you working on an issue and believe advocacy might be the next step to make wider-scale change? This session, designed for those who intend to get involved in policy, offers advice for scanning your issue, strategy tips, coaching, and inspiration to move ahead—either as a catalyst or as a coalition member.

Prioritizing What Matters Most

Foundation Management

During the course of a typical day, you might attend meetings with grantees; make site visits; manage grant requests; return telephone calls, emails, and letters; and work with board or staff colleagues. When this gets overwhelming it can impact your efficiency, effectiveness, and morale. We'll offer tools that will help you consider and prioritize what matters most.

A Strategic Approach to Family Engagement Relationship Building

Involving the next generation in your philanthropy is an excellent way to teach fiscal responsibility, build a family legacy, and foster connections across generations outside of traditional family gatherings. In this workshop, explore a variety of ways to engage the whole family in your philanthropy to amplify your impact.

Update Available: Upgrading Your Foundation Technology

Foundation Management

Increase your productivity by exploring different uses for technology to improve your foundation's operations. This interactive session will give you the opportunity to explore how you can right-size your foundation's technology needs.

FRIDAY, OCTOBER 4

9:00 – 11:30 AM

5% Is Your Foundation's Most Important Number

Foundation Management

The IRS reports that failure to meet the 5% distribution requirement is the top reason for private foundation penalties or taxes. Since all foundations know about the distribution requirement and many give more than 5%, where's the disconnect? To make the most of your giving, learn what can be included in the 5% and get tips on anticipating and regularly monitoring the number that gets reported on the 990-PF tax form.

Evaluating Your Foundation, Not Just Your Grantees

Philanthropic Leadership, Foundation Management

The impact of your philanthropy is as much about the work within your foundation as the work of your grantees. Learn how to ready yourself for the process and practice of self-evaluation, including what to ask staff and board before you begin. Find out how this approach to evaluation can help your foundation develop a culture of learning.

SESSION DESCRIPTIONS

Great Funder– Grantee Relationships

Relationship Building

This session will showcase the importance of your working relationships with grantee partners and explore ways to strengthen these relationships. We'll discuss mutual trust, humility, empathy, proactive communication, and other attributes as hallmarks of “great” relationships. Participants will complete a diagnostic tool and discuss their strengths and areas of opportunity in small groups and as a whole.

Salon: Summon the Courage to Be Daring

Philanthropic Leadership

Are you considering convening, engaging in advocacy, or being more public in your philanthropy? Many leaders need support to take these bold steps. Use this opportunity to look inward and explore with your peers in a small, intimate setting the challenges of taking on leadership roles, and ways to overcome them—especially the personal, emotional barriers that hold us back.

Want Equity? Time to Change Your Grantmaking Practices

Equity Practices

Supporting equity and social change is not just about what you fund but how you fund. From grant applications to financial due diligence to grants management, grantmakers are looking to change how they work to be more responsive to the needs and financial realities of community-based organizations serving economically and socially disadvantaged communities.



CONNECT AT CONNECT

We want you to leave this conference with new relationships and resources to help you succeed. You can connect with leanly staffed funders and experts in philanthropy through these opportunities, from mealtimes to sessions.

MEALS

Breakfast and lunch offer opportunities to dine with others sharing your interests. For example, join a breakfast table of other foundation trustees or grab lunch with those new to philanthropy.

SESSIONS AND PLENARIES

All sessions and workshops are designed to get you talking with others in the room. We encourage you to participate fully to get the most out of your conference experience.

NETWORKING RECEPTIONS AND COFFEE BREAKS

Join other participants for two casual networking receptions and coffee breaks throughout the day. Grab a bite, meet someone new, and share what you learned in that day's sessions.

EXHIBIT HALL

Our exhibitors are some of the most knowledgeable experts in the field of philanthropy. Their work with organizations like yours gives them insights into the field that can benefit all of us. Whether you're looking to purchase their services or not, we encourage you to chat with them about a current challenge or find out what their vision is for the future of philanthropy.

Our current exhibitors (as of June 30, 2019):

AB Bernstein	Schwab Charitable
Blackbaud	Submittable
Ellwood Associates	Trillium Asset Management
Fidelity Charitable	US Bank
Foundant	US Trust
Foundation Source	USI Affinity
Glenmede	Vanguard Asset Management Services
King Baudouin Foundation	Zoomgrants
Mason Investment Advisory Services	

DINE-AROUNDS

Join colleagues at offsite restaurants for informal topic-focused conversations or for dining with a specific peer group (e.g., donors, family foundation executive directors). Exponent Philanthropy will publicize Dine-Arounds; hosts are responsible for all other logistics.

SUPER CONNECTORS

These participants double down on their commitment to connecting with colleagues by introducing themselves at meals, receptions, and breakout sessions, and by facilitating connections among other participants. Super Connectors will convene briefly during the conference to trade tips and tricks on being a Super Connector.

HOTEL INFORMATION

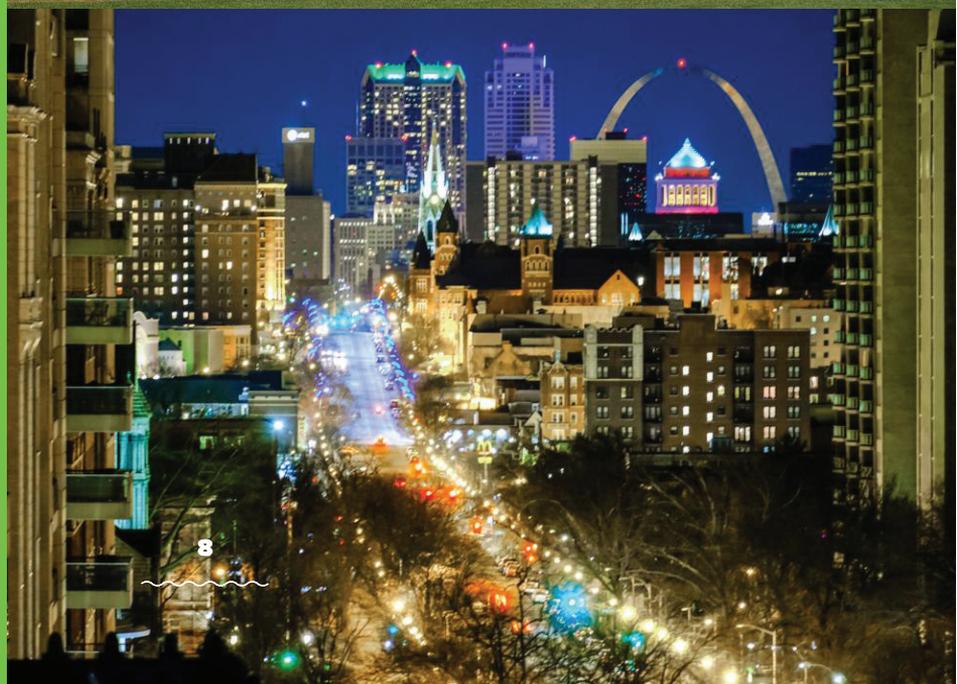
Hilton St. Louis at the Ballpark

1 South Broadway, St. Louis 63102

Room rates start at \$189 per night plus taxes. This special rate is available through September 10 or until the room block is full.

You may reserve your hotel room for the 2019 CONNECT Conference securely online or by calling the Hilton St. Louis at the Ballpark at 1-800-445-8667. Please reference our group code “EXP” to receive your discount.

Important note: Do not respond to booking calls from other vendors; they are not authorized agents and may be fraudulent.



REGISTRATION INFORMATION

Register now: exponentphilanthropy.org/CONNECT

Registration fee includes all meals during daytime hours and admission to the exhibit hall and networking receptions. To learn more, view a full schedule of events online. Please note that registration fees DO NOT include your hotel reservations.

	MEMBERS	NON-MEMBERS
Conference Registration	\$1095	\$1395
Master Juggler Executive Institute at CONNECT	\$2295	\$2595

(includes the cost of registration for the full conference)

Eligibility

Exponent Philanthropy programs are open to foundation donors, trustees, and staff; individual donors; donor advised fund holders; members of giving circles; board and staff of philanthropic support organizations; and Exponent Philanthropy sustaining and professional partners. The attendance of any party shall be within the sole discretion of Exponent Philanthropy. Exponent Philanthropy programs are not open to solicitors and/or grantseekers. If you are unsure about whether you are eligible to attend, please contact us at info@exponentphilanthropy.org or 202-580-6560.

CONNECT Conference Refund Policy

By registering for CONNECT, participants agree to Exponent Philanthropy's participant and eligibility guidelines. Please note that our refund policies are based on the significant costs incurred by the deadlines, including contractual arrangements with the hotel, speakers, and vendors.

Substitutions are accepted at any time. Cancellations on or before August 12 are subject to a \$75 processing fee. Cancellations between August 13 and September 3 will receive a 50% refund minus the \$75 processing fee. Cancellations on or after September 4 are nonrefundable.

For registrants of the Master Juggler Executive Institute at CONNECT

Substitutions will not be accepted for this cohort program. Written cancellation/refund requests will be approved only under extreme circumstances and according to the same deadlines as listed above. In the case of cancellation, your spot will not carry over to future programs and you will need to reapply.

Exponent Philanthropy is grateful to the following organizations for their support of the 2019 CONNECT Conference.

CONFERENCE SUPPORTERS

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Okabena Advisors
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Roblee Foundation
St. Louis Community Foundation
Submittable
The Racial Equity in Philanthropy Fund
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CONNECT

REGISTER AT exponentphilanthropy.org/CONNECT

YOU WORK ALONE OR WITH A SMALL TEAM AND ACCOMPLISH BIG THINGS.

YOU ARE COMMITTED TO YOUR MISSION AND WORK TIRELESSLY TO MAKE AN IMPACT.

YOU ARE A LEADER, CONVENER, GRANT MAKER, RELATIONSHIP BUILDER AND ALL-AROUND DO-IT-YOURSELF.

You are a 
MASTER JUGGLER.



Join your peers for a unique professional development experience designed specifically for executive directors of small-staffed foundations.

The **Master Juggler Executive Institute** at **CONNECT** will focus on learning about the adaptive leadership model and making progress on tough challenges in your work. Following your **CONNECT** experience, you will have the opportunity to navigate from problem to solution through virtual consultations with the facilitator and/or a small community of practice.



Apply as part of your **CONNECT** registration at exponentphilanthropy.org/CONNECT

MASTER JUGGLER
EXECUTIVE INSTITUTE
AT CONNECT

October 1–4, 2019
St. Louis, MO

Carefully crafted for those in the most senior staff role at their foundations, we combine leadership development with CONNECT's practical workshops, to provide executive directors the opportunity to hone their individual leadership skills while forging deep connections with peers and exploring organizational best practices.

Apply as part of your **CONNECT** registration at
exponentphilanthropy.org/CONNECT

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