



Conference Session Descriptions

Wednesday, October 10

Affinity Group-Sponsored Learning-Working Sessions 8:30 AM- 4:00 PM (Open to all!)

Executive Transition and Leadership Continuity Affinity Group - Advancing the Field Deep Dive Working Session

Governance Affinity Group Innovation Lab: From Anecdotes and Convention to Research-Based Practice- Moving the Governance Field Forward

Capacity Building Organizations Affinity Group

Interest Groups-Sponsored Learning-Working Sessions (Open to all!)

Advancing Racial Equity Interest Group - 1:00 PM - 4:00 PM

Consulting Practice Development Interest Group - 9:00-3:30

Performance Management/Evaluation Interest Group - 2:45 - 4:30 PM

Grantmaker Convening, Wednesday, October 10

Evening Gatherings: Welcome Reception & Dine-Arounds

Thursday, October 11

8:00 AM - 9:00 AM - Keynote: Jay Williams, CEO, Hartford Foundation for Public Giving

Morning Session 1 - 9:15 AM - 10:45 AM

Morning Session 2 - 11:00 AM - 12:30 PM

12:45 PM - 2:00 PM - Lunch Keynote: Sam Cobbs, Tipping Point Community, Chief Program Officer

Afternoon Session 2:00 PM - 4:00 PM

Evening Convening: 20th Anniversary Gala Reception

Friday, October 12

8:00 AM - 9:00 AM - Advancing the Alliance - Building Our Community (Open to All!)

Morning Session 1 - 9:15 AM - 10:45 AM

Lunch Keynote Plenary: 12:45 PM - 2:00 PM - Advancing Racial Equity in Capacity and Movement Building: Challenges and Future Directions

Afternoon Session 2:00PM - 4:30PM - Re-Envisioning the Capacity-Building Field: Developing Our Point of View



Wednesday, October 10th

Registration Open									
<i>First Timer - Conference Orientation with Anne Yurasek, Board Chair & Tamela Spicer, Conference Chair</i>									
Sponsored Sessions	Governance Affinity Group	Executive Transition	Capacity Building Organizations	Practice Development	Advancing Racial Equity	Grantmakers			
8:30 AM - 10:00AM	Governance Affinity Group Innovation Lab: From Anecdotes and Convention to Research-Based Practice-- Moving the Governance Field Forward-- Includes Workshop: <i>Wait, Wait, Don't Tell Me? Myth Busters: Challenging So called "Best Practices" in Governance</i>	Executive Transition and Leadership Continuity Affinity Group - Advancing the Field Deep Dive Working Session		Practice Development Interest Group Planning Session					
10:00AM - 12:00PM			Workshop: Reimagining Capacity Building: From Roots to New Shoots Michael Seltzer, Baruch College; Patty Oertel, The Oertel Group; Luci Dabney, PACE; Peggy Outon, Robert Morris University	Workshop: The Big Bang (Facilitation) Theory: Advanced Facilitation & Training Workshop: Techniques -Jeanne Allen					
12:00PM - 1:00PM								Overview of HFPG Capacity Building Efforts in the Region and Lessons Learned (starts at 11:30AM and includes lunch; pre-registration required)	
1:00PM - 2:45							Workshop: Capturing Capacity Building Change: A View from the Cultural and Technical Frontier and Future Developments Keith Timko, Support Center and Judy Levine, Cause Effective	Facilitated Dialogue: The Business of Being in Business: A Peer-to-Peer Dialogue - Practice Development Interest Group Members	Workshop: All for One: Leading a Process for Effective Funder/Capacity Builder Outcomes Planning; Presenter Miguel Bonilla, Senior Director of Capacity Building for the Department of Youth and Community Development
2:45 - 4:00PM							Performance Management Interest Group Working Session		Workshop: How Do We Define "Effectiveness"? Our Journey Leveraging Our Influence to Advance Nonprofit Diversity, Equity, and Inclusion – Presenter Amanda Holm and Andrea Madu, Boston Foundation
4:00 - 5:00PM			Networking Break						
5:00 - 6:30PM	Welcome Reception - Hilton Hartford Hotel								
7:00 - 9:00PM	Hartford Dine Around Events								

Wednesday, October 10

Affinity Group-Sponsored Learning-Working Sessions 8:30 AM- 4:00 PM (Open to all!)

Executive Transition and Leadership Continuity Affinity Group - Advancing the Field Deep Dive Working Session

Over the last year, the Executive Transition and Leadership Continuity (ETLC) Affinity Group convened a series of conversations among practitioners to revise the model of how we think of and approach the work of executive transition, and to look more deeply at aspects of the model such as sustainability, succession planning, equity and inclusion, interim executive services, and board governance. The Executive Transition and Leadership Continuity Affinity Group will host a session to review the thinking that has emerged from these conversations, identify key elements that inform our practice, and agree on next steps and commitments to move the new frame and practice forward. This session is designed for the ETLC Affinity Group and is open to all consultants who are seasoned executive transition practitioners.

Governance Affinity Group Innovation Lab: From Anecdotes and Convention to Research-Based Practice- Moving the Governance Field Forward

Session will include the following workshop:

Wait, Wait, Don't Tell Me! Myth Busters: Challenging So Called "Best Practices" in Governance

Members of the Governance Affinity Group

Myths and urban legends about nonprofit governance withstand the test of time. However, which ones are based on evidence and which ones should be debunked? This unique, highly interactive and fun workshop will highlight empirical research using the NPR's "Wait, Wait Don't Tell Me" game format! We will challenge common wisdoms and anecdotal practice and generate a lively discussion with participants, identifying research-based governance practices and those needing additional evidence.

Following the workshop: Why are so many governance practices based on anecdotal information or convention rather than evidence? The Governance Affinity Group has been taking steps to answer this question, working together on several exciting research to practice projects, with the goal of advancing the field of governance through researched-based practice. Join us in our efforts to create a series of unique video and written "research-based practice tools" focused on our and other research, specifically designed for capacity-builders. To inform this work, we will discuss the findings/practice implications from two national surveys conducted by the Affinity Group. The first is a newly completed study, *Leadership of Nonprofit Boards*, a



follow-up study of our published research, [*Voices of Nonprofit Board Chairs*](#). This new study focuses on the selection, roles, preparation, diversity, and shared leadership practices of board leaders. We also will discuss practice implications of initial findings from our national survey of consultants, asking what governance practices they advocate for with their clients as so called, “best practices”, and what consultants base their decisions upon for selecting such practices. **Session is open to all conference participants!**

Capacity Building Organizations Affinity Group

The Capacity Building Organization Affinity Group invites active affinity group members and those new to the Alliance for an interactive day exploring the origins of the Alliance and the future as well as new developments in the field. The day’s sessions will include time for networking and planning for 2019 as well as panels, presentations and short talks designed to get us thinking and connecting with one another. Highlights include an opening panel on Reimagining Capacity Building: From Roots to New Shoots and a series of presentations focused on new technologies and new strategies in the work.

Workshop: Reimagining Capacity Building: From Roots to New Shoots: 10-11:45AM

Michael Seltzer, Baruch College; Patty Oertel, The Oertel Group; Luci Dabney, PACE; Peggy Outon, Robert Morris University

This interactive session imagines the journey of capacity building over the last forty years including the events that led to the Alliance’s creation (the Strategic Alliance Task Force that had members from the Nonprofit Management Association, Support Centers of America, Technology Resource Consortium and what was then NCNA - National Council of Nonprofit Associations). Join us for a variety of perspectives on the people and collaborations that have arisen and what the next forty years of capacity building will look like. There will also be an opportunity to build out our collective timeline for when and where we as individuals and organizations joined the movement.

Workshop: Capturing Capacity Building Change: A View from the Cultural and Technical Frontier and Future Developments

Keith Timko, Support Center and Greg Cohen and Judy Levine, Cause Effective

For 18 months, two Alliance member capacity building organizations, Cause Effective and Support Center, have partnered to use Salesforce to capture the change in our work. Over the course of this effort, they have learned about organizational readiness, the challenges of working collaboratively, and the functions of capacity building that can provide a unified view effectiveness of this work. In this 90-minute session, the presenters will review their progress and plans for how they will use this data to inform their progress over time. They also will introduce participants to a quick readiness assessment and an inventory of the people, resources, and funding that was required. Lastly, attendees will be asked about their interest in this initiative if it were made available more broadly (for instance, we are developing a CBAApp--Capacity Building Application) that could be of assistance to other capacity building organizations.



Interest Groups-Sponsored Learning-Working Sessions (Open to all!)

Advancing Racial Equity Interest Group - 1:00 PM - 4:00 PM

The Alliance Advancing Racial Equity Group's aim is to explore ways to expand capacity builders' ability to work more effectively with nonprofits to address issues of racial equity, inclusion, and diversity as a key focus in attaining their mission and meeting their goals. This Interest Group will act as a lab to develop and test out concepts for learning and applying a variety of methods to build nonprofits and their leaders in generating support for or implementing policy and practice changes in creating racial equity and inclusion. We also will use a case study approach to clarify and confirm new practices or effective capacity building practices and examine strategies to overcome challenges or barriers.

Consulting Practice Development Interest Group - 9:00-3:30

This Interest Group is offering a range of opportunities to convene with other consultants who are interested in strengthening their skills and their business practices.

9:00AM – 10:30AM: Practice Development Interest Group Planning Session: Join us for a lively discussion about our plans for the coming year, including developing an established set of convenings for the coming year, increasing engagement of our group using our YM platform, and exploring opportunities for leadership.

10:30AM – 12:00PM: The Big Bang (Facilitation) Theory: Advanced Facilitation & Training Techniques: Presented by Jeanne Allen

You are an experienced nonprofit trainer and facilitator who provides leadership training and development. You have solid skills but you're wanting to update your range of facilitation and training tricks. Come explore new techniques to add to your training palette including ideas from design thinking, appreciative inquiry, and gamification and maybe more that will freshen up your practice and recharge your passion for training. We'll get you moving in this participatory session so come prepared to exchange ideas, be energized and inspired! As a bonus, resources for additional new ideas you can use back at the office will be shared.

1:00 – 3:30PM: The Business of Being in Business: A Peer-to-Peer Dialogue

This session facilitated by a small group of seasoned consultants will create a space to explore how as individual practitioners, small firms, and mid-size firms that we develop our own organizations as service providers, create robust pipelines, and ensure high quality service delivery for those we serve. From tips and tricks to addressing emerging challenges surfaced from the group, this session will allow you to meet with other practitioners to explore the opportunities and challenges of being a capacity builder.... and a business owner.

Performance Management / Evaluation Interest Group - 2:45 - 4:30 PM

What Change Can Capacity-Building Influence?

How do we know if our capacity building is making lasting improvements in our client organizations? Do the improvements help their participants? If it's successful, how would we know? Or should we measure the impact of capacity building only when funders want to know? Come to an open conversation hosted by the Performance Management/Evaluation Interest Group, where we'll exchange ideas and



experiences in response to these questions. Session includes an hour long clinic, where participants will identify possible initial, intermediate, and long-term organizational outcomes resulting from a recent consulting engagement. We'll conclude by exploring how we might take this conversation to the next level in our practices and in the Alliance.

Grantmaker Convening, Wednesday, October 10

11:30 AM- 4:00 PM

The Hartford Foundation for Public Giving, The Foundation Center, and The Alliance for Nonprofit Management would like to invite grantmakers to a special set of sessions on the first day of the conference. This session will be held off-site at The Lyceum, which is located at 227 Lawrence St, Hartford, CT 06106

11:30AM – 1:00PM: Networking Lunch including an Overview of HFPG Capacity Building Efforts in the Region and Lessons Learned

1:00 – 2:30PM: All for One: Leading a Process for Effective Funder/Capacity Builder Outcomes Planning; Presenter Miguel Bonilla, Senior Director of Capacity Building for the Department of Youth and Community Development

What can funders and capacity builders learn from a city agency's efforts to develop meaningful outcome indicators collaboratively? How do you address power dynamics that sometimes infringe on open, creative, cooperative conversations? Gain insight from one of NYC's largest capacity building funders and walk away with ideas for communicating the impact of your work. The purpose of the session will be to share the lessons learned from this process and see the results of this ongoing, iterative development. Participants should walk away from the session with:

- Indicators for measuring the impact of capacity building
- Ideas for shifting funder/capacity builder power dynamics
- Templates for looking at outcome data to inform quality improvement

2:45 – 4:00PM: How Do We Define “Effectiveness”? Our Journey Leveraging Our Influence to Advance Nonprofit Diversity, Equity, and Inclusion – Presenter Amanda Holm and Andrea Madu, Boston Foundation

Learn how one local community foundation incorporates a diversity, equity, and inclusion (DEI) lens into its capacity building efforts and grantmaking practices. During this session, Boston Foundation grantmaking staff will discuss the organization's journey towards including an explicit DEI focus on the work, how its capacity building investments have changed to include practices centered on racial justice, and how we collect and share information more broadly about the nonprofit sector's progress on DEI. We will also discuss our own lessons learned in analyzing our own internal practices as an institutional funder and share openly about what's worked and what has not, and where we are still on our learning journeys we engage more deeply in this work.



Thursday, October 11th						
7:30AM - 6:00PM	Registration Open					
8:00AM - 9:00AM	Welcome Plenary Breakfast - Welcome Remarks - Jay Williams, Hartford Foundation for Public Giving					
9:00 - 9:15	Break					
9:15AM - 10:45AM	Racial Equity, Diversity and Inclusion in Governance: How to Confront Challenges and Create Change Vernetta Walker, Vernetta Walker & Associates Consulting, Inc.	Shifting the Lens of Equity: Frameworks, Approaches, and Tools MaryKay Penn, Another World Consulting and Ayoka Wiles-Abel, Brooklyn Arts Council	Capacity Building for the Real World: Two Practical Frameworks & Applications from St. Louis - John McClusky, University of Missouri-St. Louis; Lisa Clancy Social Innovation St. Louis; and Karl Guenther, Community Builders Network	The Sustainability Lens: How a Consultant and Interim Executive Can Set an Organization Up for Success Before and During Transition - Catherine Bradshaw, Cadence Consulting; Julia Burns, Clarity Transitions; Beth Schechter, Beth Schechter Consulting; and Lynne Molnar,	Facilitated Dialogue Session : Advancing Racial Equity: Exploring Our Roles as Nonprofit Change Agents in Cross-Race Consulting Teams Curdina Hill, M.PH., ClearWays Consulting & Coaching & Nancie Zane, Ph.D., Praxis Consulting Group (9:15 - 12:15)	
10:45 AM- 11:00AM	Break					
11:00 AM- 12:30PM	Building Capacity for Transformative Change in Immigrant Communities Luz Zambrano, Center to Support Immigrant Organizing & Kevin Whalen, Center to Support Immigrant Organizing	A Capital Idea: Reframing Capacity Building as Capital Building Gayle Gifford, Cause & Effect Inc., & Elizabeth Castillo, Ph.D., Arizona State University	How to Look at Your Own Capacity building Organization or Independent Practice Through a Racial Equity Lens Yaro Fong-Olivares, Community Resource Exchange	Nonprofit Financial Health Inequities: Practical Implications of a "Big Data" Analytics Study Pete York, BCT Partners		
12:30 - 2:00PM	Lunch Keynote: <i>Where It Counts: How Data + Equity Make a Difference in Capacity Building</i> , Sam Cobbs, Tipping PointCommunity, Chief Program Officer					
2:00 - 4:00PM	Liberatory Facilitation: Working with Groups to Consciously Empower People of Color Amadee Braxton, Dragonfly Partners & Sarah Joffe, Dragonfly Partners	Emergent Learning from Operationalizing Disruptors and Gatekeepers as Reflective Practice LaTonya Green, Social Science Ventures & Jessica Baumont, Rooted Strategies	Beyond Diversity to Equity and Inclusion: A Change Management Consulting Framework Trina Jackson, & Stewart Lanier, TSNE/MissionWorks	It Takes All Sorts: Methods and Evaluation for Successful Cohort-Based Capacity Building Cindy McMahon, WNC Nonprofit Pathways, Gretchen Upholt, FMA, & Amy Studwell, Hartford Foundation for Public Giving	Facilitated Dialogue Session: Consultation Failure Lab: Stories and Reflections Molly Penn, PENN Creative Strategy	Facilitated Dialogue Session: Transitioning to Life After Full-Time Work: Paths, Lessons, and Opportunities Tom Adams, Judy Alnes, & Tim Wolford
4:00 - 5:00PM	Break					
5:00 - 6:00PM	Speaker and Presenter Reception					
6:00 - 9:00PM	20th Anniversary Celebration Dinner					



Thursday, October 11

8:00 AM - 9:00 AM - Welcome Remarks: Jay Williams, CEO, Hartford Foundation for Public Giving

Morning Session 1 - 9:15 AM - 10:45 AM

Racial Equity, Diversity and Inclusion in Governance: How to Confront Challenges and Create Change

Vernetta Walker, Vernetta Walker & Associates Consulting, Inc.

The remnants of racial inequity resulting from structural racism embedded in our historical, political, cultural, social, and economic systems and institutions continue to show up in boardrooms across the nonprofit sector. To course correct, we must create inclusive boards that truly value diverse perspectives and lived experiences and make space at the table for shared power and leadership. As consultants, we can raise awareness, build understanding, and help organizations lead with their values and commit to action. In this interactive session, we will confront uncomfortable topics head-on; addresses board dynamics, power, and practices; explore BoardSource's new resources and tools for working with boards on diversity, equity, and inclusion, and become stronger champions for change by identifying strategies to help nonprofits.

Shifting the Lens of Equity: Frameworks, Approaches, and Tools

MaryKay Penn, Another World Consulting and Ayoka Wiles-Abel, Brooklyn Arts Council

This session supports capacity builders with an in-depth understanding of how to build and manage projects and organizations that benefit from diverse organizational structures and community collaborative partners. This session provides a concise overview of how people are undervalued and its systematic historical context in society. It offers a comprehensive framework for eliminating organizational systems that don't support diversity. New tools and examples are offered including a seven step approach to moving an organization from an exclusive culture to an inclusive, dynamic institution. Leadership and management skills are explored and tools for collaborating within all communities are emphasized.

Capacity Building for the Real World: Two Practical Frameworks & Applications from St. Louis

John McClusky, University of Missouri- St. Louis; Lisa Clancy Social Innovation St. Louis; and Karl Guenther, Community Builders Network

At its best, capacity building is not something "extra" but is part and parcel to the work that nonprofit professionals engage in every day as they learn while doing. In St. Louis, the Community Builders Network and Thread STL have structured and implemented their own



approaches to building the capacity of each entity's unique set of stakeholders that represent organizations and various community partnerships and coalitions. Despite the unique approaches of each, they share a common set of characteristics, including engaging stakeholders as co-designers of the capacity building effort. In this session, attendees will learn and practice applying The Capacity Ladder and the Peer Learning Community models.

The Sustainability Lens: How a Consultant and Interim Executive Can Set an Organization Up for Success Before and During Transition

Catherine Bradshaw, Cadence Consulting; Julia Burns, Clarity Transitions; Beth Schecter, Beth Schecter Consulting; and Lynne Molnar, Molnar Consulting

Instead of moving straight to search, the initial focus should be shifted to intentional transition using a sustainability lens. Examples will be used to demonstrate a range of real situations. Participants will have the opportunity to work through additional cases studies such as a founder transition, the board firing the ED, and the ED giving four weeks' notice and recommend solutions using the sustainability framework and critical question tool. The full group will discuss the implications on this shift in thinking, its impact on participants' practices, and the implications for racial equity & inclusion, governance, succession planning, and capacity building.

Facilitated Dialogue Session: (3 hour session)

Advancing Racial Equity: Exploring Our Roles as Nonprofit Change Agents in Cross-Race Consulting Teams

Curdina Hill and Nancie Zane, Ph.D., Praxis Consulting Group

As capacity builders, attempting to delve into race can be like walking on uneven or often rocky ground. What does it take and what are the challenges, whether we're tip-toeing towards or cracking-open conversations about race with our nonprofit clients? As practitioners, being able to reflect, understand and name where we are in our own journeys related to race is an essential ingredient of the work. In addition, being able to work in cross-race facilitator teams and use our partnerships as a space for holding the race-related dynamics at play and explore our reactions as "data" about what's happening in "the system", is another. Join us for a three-hour dialogue that provides opportunities for exploration in same-race and then mixed-race groups:

- Exploring our own journeys and differential experiences as consultants of color and as white consultants as you work in cross-race teams, in white-dominant groups, same race, and mixed-race groups
- Generating or naming possible strategies that consulting teams might use to navigate and support each other in facilitating this complex work



Morning Session 2 - 11:00 AM - 12:30 PM

Building Capacity for Transformative Change in Immigrant Communities

Luz Zambrano, Center to Support Immigrant Organizing and Kevin Whalen, Center to Support Immigrant Organizing

The Center to Support Immigrant Organizing will share capacity building methodologies that place working class immigrants - people directly impacted by xenophobia and Islamophobia - at the center of organizational and community change strategies. Using media, interactive exchanges and small group dialogues, we will share a framework and popular education tools that support those who suffer from racism and xenophobia to define and implement their community's agendas, and lead the broader movement for justice and change.

A Capital Idea: Reframing Capacity Building as Capital Building

Gayle Gifford, Cause & Effect Inc.; & Elizabeth Castillo, Ph.D., Arizona State University

A recent study in the Chronicle of Philanthropy announced: "the nonprofit sector as a whole is fragile and profoundly undercapitalized." But is that true? In this interactive workshop, we'll explore together how capacity can be developed using multiple forms of capital (e.g., social, financial, reputational, process, moral). You'll learn how this model has been used with great success at an innovative arts and culture collaboration. You'll match your own capacity building practices to the model to frame how capacity building consultation strengthens your client organization's capital. We'll conclude with a discussion of equity implications and how a multiple capitals approach can balance power differentials among funders and stakeholders.

Nonprofit Financial Health Inequities: Practical Implications of a "Big Data" Analytics Study

Pete York, BCT Partners

Learn about the inequities facing nonprofits trying to achieve financial health. This session will share findings from an innovative causal study that trained machine learning algorithms to learn what it takes for nonprofits to achieve financial health. This data-driven study used the complete data sets of 990-filing nonprofits (2012 and 2013), and county- and zip code-level economic, foundation giving, charitable giving and population demographics datasets. Spoiler alert: the odds of achieving financial health are stacked against nonprofits born in the "wrong zip code." The heart of this session will ask the expert audience, "so, what can we do about this?"



How to Look at Your Own Capacity building Organization or Independent Practice Through a Racial Equity Lens

Yaro Fong-Olivares, Community Resource Exchange

As capacity builders, it is our responsibility to not only use a racial equity lens to look critically at the work we do with our clients, but to also reflect on how our individual identities and lived experiences influences the way we do our work both internally within our organizations and with our clients. In this session, we share lessons and insights about the work Community Resource Exchange has done internally to build our own anti-racist lens and create an anti-racist multicultural organization. We will provide guidance into how other capacity builders can begin the same process internally and apply this lens to all the work they do with their clients, whether that be strategic planning, board development, talent management, or anything else.

12:45 PM - 2:00 PM - Lunch Keynote: Sam Cobbs, Tipping Point Community, Chief Program Officer

Afternoon Session 2:00 PM - 4:00 PM

Liberatory Facilitation: Working with Groups to Consciously Empower People of Color

Amadee Braxton, Dragonfly Partners & Sarah Joffe, Dragonfly Partners

In this session, participants will strengthen their capacity to work with groups as an anti-racist facilitator, using an awareness of racial dynamics, along with cultural norms that can be oppressive for people of color and other groups who have been historically marginalized. Through interactive presentations and small group engagement, we will both model and teach an approach to facilitating groups or meetings that integrates an understanding of oppression and power dynamics, and creates an environment in which all group members develop trust, feel empowered and fully participate.

Emergent Learning from Operationalizing Disruptors and Gatekeepers as Reflective Practice

LaTonya Green, Social Science Ventures & Jessica Baumont, Rooted Strategies

Are you a white person interested in learning from, sharing, and building capacity with other disruptors and gatekeepers, particularly as it pertains to racial equity? During this session you will engage in supporting and coaching your peers as we work through two questions: What privileges do disruptors and gatekeepers have and how can disruptors and gatekeepers be co-conspirators in advancing racial equity and inclusion that requires a shift in power? By the conclusion of the session you will have methodology and tools for reflective practice engaged in emergent learning around co-conspiring; and devised strategies as capacity builders for more effective disrupting and gatekeeping.



Beyond Diversity to Equity and Inclusion: A Change Management Consulting Framework

Trina Jackson, & Stewart Lanier, TSNE/MissionWorks

There is an emerging awareness among non-profit leaders that training and public statements of commitment about diversity and inclusion are insufficient to bring deep and sustained change. The non-profit racial leadership gap is as egregious and persistent as are the other “gaps” in our society. In this workshop we will review the concepts of diversity, inclusion and equity and then offer a framework and process for planning and managing an organization-wide change management process focused on implementation of strategic prioritization of equity and inclusion. This session will be a “workshop” in that we will begin with a basic framework and then engage participants in expanding, elaborating and developing how this emerging practice may work.

It Takes All Sorts: Methods and Evaluation for Successful Cohort-Based Capacity Building

Cindy McMahon, WNC Nonprofit Pathways, Gretchen Upholt, FMA, Amy Studwell, Hartford Foundation for Public Giving

Capacity builders are increasingly harnessing the power of nonprofit peer learning through cohort-based programming. These cohorts take many forms, whether geographically-based, centered on shared mission, focused on developing particular skill areas of the participants, or designed based on other commonalities. How do we define cohort-based capacity building work in our field, and how do we measure its impact? This 2-hour informative and interactive session will explore these questions from the perspective of three different entities: FMA, a national consulting firm; Western North Carolina Nonprofit Pathways, a regional funders’ collaborative; and Hartford Foundation for Public Giving, a regional community foundation.

Facilitated Dialogue Session: Consultation Failure Lab: Stories and Reflections

Molly Penn, PENN Creative Strategy

This dialogue session will be a safe forum for stories and reflections on capacity building “failures” - those interventions that did not go as we planned or did not land with the client as effectively as we hoped. What have we learned from these failures and how are we using that to build our own capacity and become more effective? We welcome anyone who wants to discuss and learn from failure - what it means, how it happens, how we can grow from those experiences.

Facilitated Dialogue Session: Transitioning to Life After Full-Time Mission Focused Work: Paths, Lessons, and Opportunities

Tom Adams, Judy Alnes, and Tim Wolford

This dialogue session offers conference participants who have or will be transitioning from full-time paid work to some other state of retirement or semi-retirement a unique place to hear



from other Alliance members who have made this transition and to advance personal planning. In 2016, former executive transition and capacity building consultants began meeting to explore the issues of moving from full time work. Group members will share their experiences in transition and what we have learned. Participants will be invited to share to extent they would like their own fears, questions and perspectives about their impending transitions.



Friday, October 12th					
8:00AM - 4:00PM	Registration Open				
8:00AM - 9:00AM	Alliance Breakfast - <i>Advancing the Alliance - Building Our Community</i>				
9:00 - 9:15	Break				
9:15AM	Leaning In: An Organization's Journey Towards a Liberation Zone Yanyiah Pearson, Albert Kim, and Stacey Alicea, Ramapo For Children	Nonprofit/Non-Linear: Embodying, Assessing and Changing Organizational Culture; Alissa Schwartz, Solid Fire Consulting	Movement Building and Grassroots Advocacy: How Capacity Builders Can Help Organizations Build Political Power from the Bottom Up Matt Wilson, MASSCreative & Erika Dilday, Futuro Media Group	Race to Lead: Confronting the Racial Leadership Gap - Implications for Capacity Builders Frances Kunreuther and Ofronama Biu, Building Movement Project	Unlocking the Secrets to Effective Leadership of Boards -- How nonprofit board officers and committee chairs understand, prepare for, and share leadership roles and power: Practice implications from a national study by the Governance Affinity Group Judy Freiwirth, Psy.D. Nonprofit Solutions Associates & Mike Burns, BWB Solutions
10:45 - 11:00AM	Break				
11:00 - 12:30PM	McAdam Book Award Winner Workshop (TBD), Presented by the winner of the 2018 Terry McAdam Book Award	Racial Equity Toolkit: Using Organizational Assessments to Advance Racial Equity Mala Nagarajan, RoadMap/ Vega Mala Consulting, Stephanie Leiderman, Center for Assessment and Policy Development, and Keith Timko, Support Center for Nonprofit Management	Innovation as Touchstone: Emergence and Racial Justice in Capacity Building Brigitte Rouson, Aaron Goggans, & Rebecca Mintz, Insight/Incite Consulting	How Small is Small: Strategies for Strengthening Community-based Nonprofits Douglas Shipman, Nonprofit Support Program, Hartford Foundation for Public Giving and Janna Pedersen, Ampersand Consulting, Inc.	
12:30 - 12:45	Break				
12:45 - 2:00PM	Advancing Racial Equity In Capacity Building and Movement Building: Challenges and Future Directions - Keynote Panel Discussion with: Oscar A. Chacón, Co-Founder and Executive Director of Alianza Americas; Cyndi Suarez, Senior Editor, The Nonprofit Quarterly; Cynthia Parker, Interaction Associates for Social Change; Trina Jackson, TSNE/Missionworks; and Nesly Metayer, Ph.D.				
2:00 - 4:00PM	Re-Envisioning the Capacity-Building Field: Developing Our Point of View				
4:00 - 4:30PM	Conference Closing				



Friday, October 12

8:00 - 9:00AM - Advancing the Alliance - Building Our Community

(Open to All!) Join the Alliance Board of Directors for engaging discussion reflecting on the past year and charting our course for 2019 and beyond. Explore our current priorities and provide your input into how we continue to build and strengthen our community.

Morning Session 1 - 9:15 AM - 10:45 AM

Leaning In: An Organization's Journey Towards a Liberation Zone

Yaniyah Pearson, Albert Kim, and Stacey Alicea, Ramapo For Children

This workshop explores the pivotal role capacity builders can play in support of organizations seeking to unpack and address conditions of institutional racism. This workshop will engage participants in replicable processes and activities designed to support organizations as they: 1) embrace difficult conversations about institutional racism; 2) articulate a historical perspective that addresses microaggressions and patterns of systemic racism within their community; 3) center and contextualize discussions using relevant bodies research; and 4) adopt anti-racist practices. The workshop will introduce strategies to assess client readiness, conversational and restorative processes to facilitate courageous conversations, and a compass for aligning organizational practices with racial equity.

Movement Building and Grassroots Advocacy: How Capacity Builders Can Help Organizations Build Political Power from the Bottom Up

Matt Wilson, MASSCreative & Erika Dilday, Futuro Media Group

Starting a grassroots advocacy group from scratch is a heavy lift. In six years, MASSCreative, a Massachusetts arts advocacy group, has evolved from an idea to a powerful voice for the state's creative community. Learn how the group moved from idea to reality, used its program to strategically build its organizational capacity, drew tools and tactics from other issue movements, recruited and engaged a diverse set of advocates, and developed and utilized a public interest narrative to drive its programmatic and organizational growth.

Unlocking the Secrets to Effective Leadership of Boards -- How nonprofit board officers and committee chairs understand, prepare for, and share leadership roles and power: Practice implications from a national study by the Governance Affinity Group

Judy Freiwirth, Psy.D. Nonprofit Solutions Associates & Mike Burns, BWB Solutions

Board officers and committee chairs are expected to lead the board's work...but are they chosen with any criteria, such as leadership skills or racial equity? Do they prepare for these leadership roles? How do they learn to be effective leaders? And is the traditional one-person



board chair model unrealistic or would a shared leadership model be more impactful? Come learn about the findings from the Governance Affinity Group's 2018 national research study on the Leadership of Nonprofit Boards. Engage in practice implications using highly interactive methods, including a game show format! Participants also will use newly designed tools to help them work with nonprofits and networks develop new leaders and consider shared leadership models of governance.

Nonprofit/Non-Linear: Embodying, Assessing and Changing Organizational Culture

Alissa Schwartz, Solid Fire Consulting

Positive organizational culture is the “secret sauce” of non-profit functioning, ensuring organizational resilience and meaningful social impact. The work of social change organizations, communities, and philanthropies is inherently complex, with multiple moving parts and players. It is crucial that non-profit organizational culture be nimble, inclusive, and self-reflective. In this highly experiential workshop and thought partnering session, we will discuss and generate meaningful data about organizational culture. Findings from the Complexity Organizational Assessment Tool, an assessment tool developed by Dr. Schwartz that taps into how well groups work with complex non-linear challenges; engage in equity and inclusion practices; and practice collective reflection and care, will be shared and discussed.

Race to Lead: Confronting the Racial Leadership Gap - Implications for Capacity Builders

Frances Kunreuther and Ofronama Biu, Building Movement Project

In June 2017, the Building Movement Project released the first report in the Race to Lead series looking at why there are so few leaders of color in the nonprofit sector. The results of a survey of over 4,000 people working in nonprofits clearly indicate that bias and structural barriers – rather than qualifications or aspirations – prevent people of color from advancement. This session will start with a quick review of the existing reports and new data, followed by an interactive discussion with session participants on 1) their reactions and experiences, 2) how the findings can influence practice, and 3) what other information is needed for effective racial justice capacity building.

Morning Session 2 - 11:00 AM - 12:30 PM

Innovation as Touchstone: Emergence and Racial Justice in Capacity Building; Sponsored by the People of Color Affinity Group

Brigette Rouson, Aaron Goggans, and Rebecca Mintz, Insight/Incite Consulting

What does it take to build capacity for liberation? In this session, we explore ways to create stronger, more effective networks of change agents and progressive organizations that work for social justice. By supporting a more transformative approach at every level of system, and using

emergent discovery and planning, we demonstrate how to contribute to the possibility of strong social movements that push for sweeping change.

How Small is Small: Strategies for Strengthening Community-based Nonprofits

Douglas Shipman, Nonprofit Support Program, Hartford Foundation for Public Giving and Janna Pedersen, Ampersand Consulting, Inc.

Based on review of existing capacity building literature, benchmarking and lessons learned from its ongoing capacity building programs, the Hartford Foundation for Public Giving initiated a program to strengthen the capacity of small nonprofits in its region. Foundation staff, participating capacity builders and nonprofit leaders will lead interactive discussion and exercises related to the state of capacity building research, options for conducting analyses of service gaps, the unique needs of small nonprofit organizations and the outcomes of the two-year Building on Success cohort learning program.

Racial Equity Toolkit: Using Organizational Assessments to Advance Racial Equity

Mala Nagarajan, RoadMap/ Vega Mala Consulting, Stephanie Leiderman, Center for Assessment and Policy Development, and Keith Timko, Support Center for Nonprofit Management

This session will engage practitioners in a conversation around how organizational assessments, on the surface, may seem race-neutral; however, assessments tend to privilege dominant cultural standards by what questions they ask, what constitutes a best practice or success, and who says so. We'll present innovative assessments that embed a racial equity lens and ask participants to work with assessment questions that center marginalized communities. Participants will work with a case study and sample report to explore in groups how answers to those questions help foster conversations about racial equity. We provide frameworks, guidance, resources, and research around tools that capacity builders can use in their own work.

McAdam Book Award Winner Workshop (TBD),

Presented by the winner of the 2018 Terry McAdam Book Award

Lunch Keynote Plenary: 12:45PM - 2:00PM

Advancing Racial Equity in Capacity Building and Movement Building: Challenges and Future Directions?

Keynote Speaker Panel includes:

- **Oscar A. Chacón**, Co-Founder and Executive Director of Alianza Americas;
- **Cyndi Suarez**, Senior Editor, *The Nonprofit Quarterly*;
- **Cynthia Parker**, Interaction Associates for Social Change;
- **Trina Jackson**, TSNE/Missionworks



Afternoon Session 2:00PM - 4:30PM

2:00 - 4:00PM - Re-Envisioning the Capacity-Building Field: Developing Our Point of View

Join your capacity building peers for a large group experiential session where all conference attendees will provide their perspectives on the future of the field.

4:00 - 4:30PM - Conference Closing Remarks