

RESPONDING CREATIVELY



GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS
ANNUAL REPORT 2009



mission

Understanding that grantmakers are successful only to the extent that their grantees achieve meaningful results, GEO promotes strategies and practices that contribute to grantee success.

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Message from the Board Chair and the President and CEO

In 2009, grantmakers grappled with the fallout from the worst economic downturn since the Great Depression. This past year we have all witnessed the truth of a core theory of effectiveness: Organizations that adapt and respond in the face of a shifting landscape have the greatest potential to emerge from adversity stronger and more relevant. This truism applies equally to grantmakers, to the organizations we fund and to Grantmakers for Effective Organizations itself.

As we reflect on 2009, we see not just the constraints of a down economy, but real creativity and progress. Recognizing that challenging times often require new and creative responses, many in the GEO community adjusted their work in ways that enabled their grantees to adapt more quickly and respond to the changing world around us. The examples abound — giving more at a moment when we had less; releasing restrictions on grants, recognizing that the old rules no longer apply; recalibrating our own strategies based on changes in the economy.

This year's annual report features stories of how a few GEO members are adapting in order to effectively engage those closest to the problems they hope to solve, get more sophisticated about how they deploy money, and build an internal culture that embraces learning and improvement.

Alongside of our members, GEO also adjusted our work and our thinking in some important ways. We had to make tough choices about what not to do, while at the same time embrace new opportunities to serve the field.

As we look at the year behind and the years ahead, we're once again reminded that the GEO community is unusual — not only because you're far more likely to engage in a host of sophisticated grantmaking behaviors that you and those you fund understand to be critical to effectiveness, but more importantly because you are ever vigilant in your own efforts to learn, adapt and grow over time.

Thank you for your leadership and for sharing your questions and insights with us along the way.



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

Kathleen P. Enright

President and CEO

Grantmakers for Effective Organizations



A handwritten signature in blue ink that reads "Gregg S Behr".

Gregg Behr

GEO Board Chair

Executive Director, The Grable Foundation



Learning

GEO is committed to being a resource for and facilitator of learning and action. We want members of the GEO community to have access to the ideas, connections and evidence they need to make the greatest contributions to the nonprofits they invest in. Generating meaningful feedback and data on our own performance equips us to do this well.

To inform our performance improvement, every two years GEO asks members to help us understand our overall impact on their work as well as how we can best serve them in the years ahead. In September, we released the results of our biennial member satisfaction survey, which revealed that **participation in GEO leads to important changes in grantmaker awareness, knowledge and practice**. Additionally, it gave us insights into members' challenges and how we might change what we do to be of greater assistance. The survey found that:

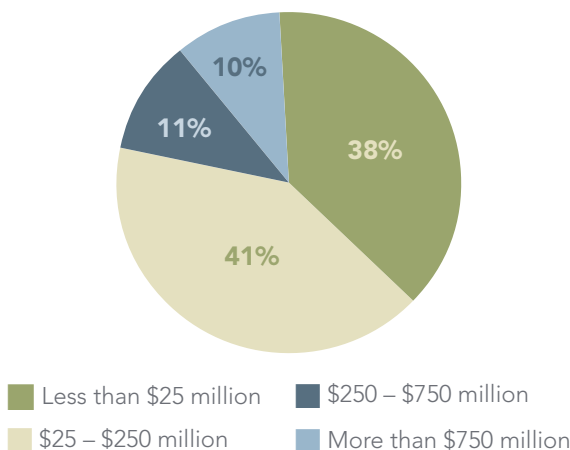
- ▷ 99 percent rated their overall experience with GEO as favorable (56 percent) or highly favorable (43 percent).
- ▷ 77 percent of our members increased their awareness of strategies and practices that enhance nonprofit success as a result of their involvement in GEO.

- ▷ 64 percent noted that participation in GEO led to a change in practice at their organization.
- ▷ Members rate GEO's national conference and publications as its two most valued resources.
- ▷ Those more familiar with GEO were significantly more likely to report that GEO has influenced positive change in practice.

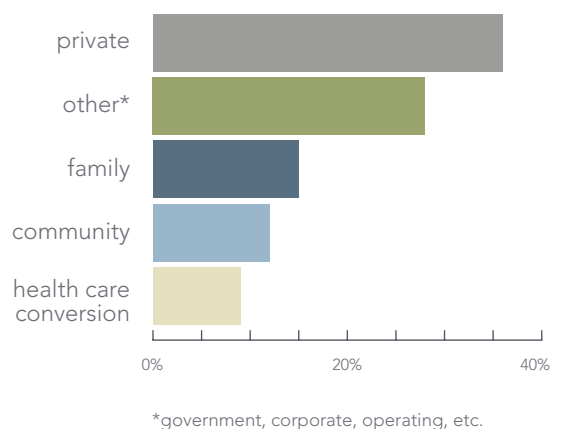
In the survey, members suggested that GEO has positively influenced their approaches to learning and evaluation. Here are a few things we heard: "I participated in the action learning group on learning. As a result, I've changed the language I use within my own organization to talk about learning, begun to change some of our internal processes (grant selection, progress report formats, etc.) and convinced our leadership team to do more work on theory of change." "I met another grantmaker through GEO, and she exposed me to new thinking about evaluation that has made a huge difference in how I think about evaluation options."

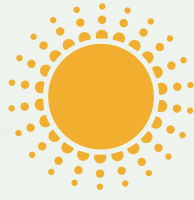
Members also suggested a few ways we could better serve their needs, including asking for more ways to conveniently connect with GEO, such as more regional offerings. Building on this learning, we're re-examining old assumptions and adapting our work accordingly.

GEO MEMBERS BY ASSET SIZE



GEO MEMBERS BY TYPE





Annie E. Casey Foundation

Over the years, the Annie E. Casey Foundation's commitment to learning for improvement has evolved. According to Douglas W. Nelson, who was until recently the president and CEO, "We have come a long way. I used to define evaluation as the enemy of social progress of any kind. It does not take much to prove nothing works, and the traditional model of evaluation is guaranteed to prove nothing works. So we are in the process of redefining what we mean by evaluation and assessment to come closer to finding out what we need to do differently to better achieve expectations and goals. It is inseparable now from the work to make change. [Evaluation] is a tool to promote change — and not only an independent judgment."

Annie E. Casey Foundation grantees appear to value this emerging approach.

"The data and evaluation capacities supported by the Annie E. Casey Foundation have provided the connection between information and regular reflection on community needs, capacities, programs, policies and the alignment of implementation with intent," said Tanja Kubas-Meyer, evaluation coordinator for Making Connections Providence. "This investment has resulted in stronger and more integrated support for children and families."

"Casey has always prioritized data and learning, and it has been extremely helpful for our staff to participate in GEO learning exchanges and conferences," says Tom Kelly, associate director of evaluation at the Casey Foundation. "We need to continually build our skills around tools and practices that help us to learn in groups — groups that include our staff, grantees, partners and fellow funders."

Adapting

In the member survey, one member said, “GEO pushes itself beyond its own comfort level. It’s interesting to watch and also to emulate. Always being out there and seeing the latest is something I value.”

This year was certainly a year where going outside one’s comfort zone was the rule rather than the exception. Much of GEO’s programming for the year was adjusted in progress to reflect the changing circumstances and the emergent needs of our community.

Though it wasn’t part of our plan for the year, we developed and released *Smarter Grantmaking in Challenging Economic Times* in May 2009 to provide some ideas on how best to support grantees during the economic downturn. The suggestions included to hold grantmaking steady, engage with stakeholders, provide flexible funding and find ways to do more with less.

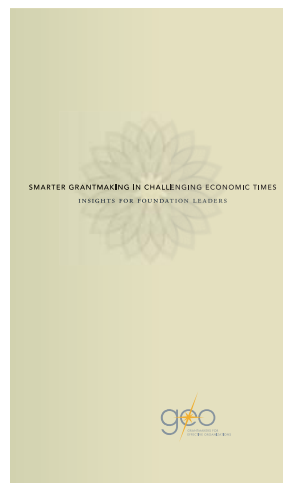
Our intent was to support the important conversations underway in communities across the country about how best to respond to very visible and dire needs.

Smarter Grantmaking in Challenging Economic Times was our most popular publication in 2009; we distributed approximately 8,525 printed copies and received 3,213 download requests on our Web site. GEO presented frequently on grantmakers’ responses to the economic climate close to home and around the world, including to The Philanthropy Workshop, the United Way of Canada, Philanthropy New Zealand, Donors Forum of Wisconsin, the National Center for Family Philanthropy and Council of New Jersey Grantmakers.

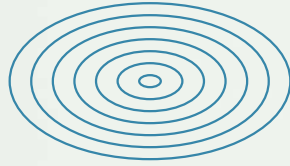
In July 2009 we partnered with the OneStar Foundation of Texas to adapt the research generated in *Is Grantmaking Getting Smarter?*, our national study of philanthropic practice, for Texas grantmakers. OneStar Foundation distributed the report, which compared practices in Texas with the national average in the hopes of initiating a conversation among their colleagues and spurring action.



On the Money: The Key Financial Challenges Facing Nonprofits Today — and How Grantmakers Can Help examines the underlying causes behind the continued financial stress in the nonprofit sector and the role grantmakers can play to alleviate that stress.



Smarter Grantmaking in Challenging Economic Times provides recommendations and examples that we hope provoke some useful insights for foundation leaders.



The Marion I. & Henry J. Knott Foundation

The size and longer lead times of many grants, and the strings attached to them, often don't afford nonprofits the kind of adaptability they need in the current climate. GEO works to improve how grantmakers financially support grantees — including providing longer-term, unrestricted funding and exploring new tools such as collaborative funds, emergency loans and mission-related investing. The changes at the Knott Foundation were particularly responsive to the real-time challenges their grantees were facing.

Greg Cantori, executive director of the Marion I. & Henry J. Knott Foundation, discovered that his grantees were experiencing significant delays in receiving payment from city funders and as a result were having cash flow problems. He went to the source, convened the various stakeholders and got to root of the problem — a convoluted city approval process that was ultimately restructured through a city council resolution — to allow prepayments.

The Knott Foundation began making bridge loans to grantees through a revolving loan fund established to hold them over until the delayed funding comes through. The program is modeled after a similar one administered by fellow GEO member the Eugene and Agnes E. Meyer Foundation in Washington, D.C. In addition to using debt as a form of capital, Cantori has found another simple solution to be extremely helpful: He picks up the phone and calls the government funders to ask what's holding up the payment. "Sometimes that's all it takes to get the check out to the nonprofits," said Cantori. "Getting a call from a third party with questions about why the money is late tends to get some action!"

"Providing cash flow loans really changes the dynamic we have with our grantees and fits beautifully into GEO's encouragement to provide effective operational support to our grantees," said Cantori. "Because the grantee is hurting financially, our conversations tend to be very honest and to the point with minimal spin. We learn what the core issue is and then we go to bat for our grantees, acting more in their service than the other way around. That power shifting creates a deeper trust including the knowledge that we won't penalize them for future grants — unless they didn't learn any lessons from the experience of course!"

Connecting

Solutions take hold when they originate from or are informed by the community where change is needed. That's one reason why GEO's members are directly involved in shaping our work. In fact, in 2009 we formalized that involvement with the creation of a membership committee to provide one more opportunity for members to engage with GEO and have a voice in decisions that affect them.

We're pleased that so many grantmakers have continued to value their participation in GEO. Even in the face of shrinking professional development and dues budgets, **GEO members continued to renew at a rate almost unchanged from previous years, and we welcomed 42 new members in 2009.**

GEO's new Web site, launched in April 2009, offers multiple ways for GEO members to engage with our community: through a rich resource library of downloadable publications and other materials; through an archive of GEO newsletters and listserv discussions; through our events calendar and *News & Events* section of the home page; and through our expanding efforts to use Web 2.0 tools like Facebook and Twitter to stay connected with our members and peers.

GEO strives to work as a networked organization, seeking collaborations and partnerships to advance our ideas and build on the work of others in the field. In 2009, GEO partnered with a wide range of individuals and organizations to create and disseminate content and to support behavior change. Here are a few examples of these partnerships:

Council on Foundations. In December GEO released *Evaluation in Philanthropy: Perspectives from the Field* — in partnership with the Council on Foundations — which put forward emerging wisdom that learning is most productive if it is structured to be

about improvement, not just proof; if we concentrate on learning with others rather than on our own; and if we begin to embrace failure. The joint publication launched a longer-term partnership between GEO and the Council to extend this conversation to more interested grantmakers.

Regional Associations. Given restraints on travel budgets, GEO more intentionally partnered with regional associations in order to meet members where they live and work. Through a record number of speaking engagements, GEO went on the road to reach grantmakers whose travel budgets had been cut due to economic realities. Additionally, we received a small grant from the Forum of Regional Associations of Grantmakers to partner with the Association of Baltimore Area Grantmakers, Donors Forum, and the Council of Michigan Foundation to create and deliver a workshop connected to our recently released publication *On the Money: The Key Financial Challenges Facing Nonprofits Today — and How Grantmakers Can Help*.

Association of Small Foundations. GEO joined with ASF to offer two teleconference seminars on how grantmakers can collaborate and do it well. We were pleased to reach nearly 100 interested grantmakers in ASF's network through the partnership.

Interaction Institute for Social Change. GEO co-created and co-presents an intensive skill-building workshop on stakeholder engagement in partnership with the Interaction Institute for Social Change. In 2009, 44 grantmakers from the United States and Canada participated in the *Engage for Results* workshop, including staff members of the Colorado Trust in Denver who incorporated the workshop into their staff development priorities for the year. In a confidential survey one participant shared that they completely revamped the evaluation of one of their programs based on what they learned at the workshop.



Ontario Trillium Foundation

Several staff members of the Ontario Trillium Foundation have attended GEO's *Engage for Results* workshop, during which it has become clear that reaching out to their constituencies and forging stronger relationships is a core practice, with impressive results. A quest to understand what can be done to support community organizations and volunteers spurred changes in the way Ontario Trillium Foundation practices everyday grantmaking. With the appointment of a new board of directors in 2004, the foundation decided to investigate how they could better themselves and the effectiveness of their nonprofits; gathering perspectives from more than 1,000 Ontarians was the first step to major reform. To connect with their key community stakeholders, Ontario Trillium Foundation began holding Community Conversations sessions, which brought in the opinions of local nonprofits and individuals who wanted their voice heard. Additionally, surveys dispersed through their Web site and promoted in Ontario newspapers helped draw more thoughts to the issue. The findings of this engagement caused an entire revamping of their grantmaking process.

After assessing the input from survey participants, the foundation simplified its application process for small capital requests, launched a streamlined online application and reporting system, and expedited the "decline" process so applicants would know the decision sooner. Also, to focus on the community, the foundation began a new, high-engagement grantmaking program that truly engages grantees and community stakeholders, both in program design and in evaluation.

These changes have generated better relationships with the public and better results for their grantees.

“GEO has been an invaluable resource to us. The conferences, publications, conversations, knowledge exchange and *Engage for Results* workshop have helped us learn from others and reflect on and improve our engagement process.”

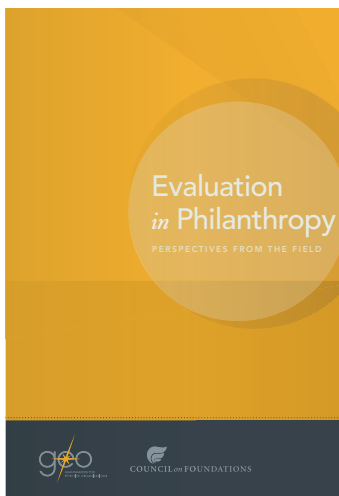
Dan Wilson,
Manager of Policy, Research and Evaluation
Ontario Trillium Foundation

Growing

Building on what we've learned in a year of adaptation, we're prepared to grow in ways appropriate to the new world in which we all live. As such, we plan to offer more customized services and experiment with new remote-learning opportunities. We will go deeper on the importance of grantmakers of all types supporting the full costs of a nonprofit's work if they expect organizations to be strong and well equipped to deliver successful programs.

By press time, 540 grantmakers had gathered in Pittsburgh for our biennial national conference *Unleashing Philanthropy's Potential*, where they reconnected with peers and tapped the creativity and expertise of multiple perspectives. The vast majority reported that they walked away with new tools and strategies that will help them continue to learn, adapt and grow.

GEO has been called to serve in a new way in the years ahead — as a convener, liaison and information broker between the field of philanthropy and the public agencies involved with the Social Innovation Fund. Our Scaling What Works project will put the GEO community in direct connection with an important experiment in how to best build effective partnerships between philanthropy and the public sector so that community solutions can grow and expand. Through this three-year initiative funded by an independent coalition of more than 20 grantmakers, we hope to contribute to the overall capacity and effectiveness of hundreds of grantmakers and thousands of nonprofits far beyond those directly involved in the Social Innovation Fund. We look forward to working with our members and peers in the field on this endeavor and on other important aspects that contribute to smarter grantmaking, stronger nonprofits and better results in 2010 and beyond.



Evaluation in Philanthropy: Perspectives from the Field explores how evaluation can help grantmakers learn and improve practices (not just “prove” results).

GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS

Board, Staff and Committee Members

2009 Board of Directors

(as of December 31, 2009)

Gregg Behr, Chair
The Grable Foundation

Handy L. Lindsey, Jr., Vice Chair
The Cameron Foundation

Valerie S. Lies, Treasurer/Secretary
Donors Forum

Gayle Williams,
Governance Committee Chair
Mary Reynolds Babcock Foundation

Beth Bruner, Immediate Past Chair
Bruner Foundation

Roberto Cremonini
Barr Foundation

Irene M. Ibarra
The Colorado Trust

Clara Miller
Nonprofit Finance Fund

Mary Mountcastle
Z. Smith Reynolds Foundation

Grant Oliphant
The Pittsburgh Foundation

Suzanne Walsh
formerly of Lumina Foundation
for Education

GEO Staff

Leonor Alfonso
Senior Program Specialist

Madhu Arora
Marketing and Communications
Specialist

Lori Bartczak
Manager of Content Development

Karen Bate
Manager of Marketing
and Communications

Courtney Bourns
Vice President of Programs

Tony Bowen
Development Associate

Kathleen P. Enright
President and CEO

Walter Fields
Program Assistant

Eunice Gambrah
Operations Assistant

Kamasha Hendrickson
Senior Events Specialist

Laurel Jacobsen
Membership Specialist

J McCray
Director of Operations

Jillaine Smith
Manager of Action Learning

Jason Twiss
Manager of Member Engagement

Suzi Van Sickle
Program Assistant

Leadership Committee

Paul Hogan
John R. Oishei Foundation

Stephanie McAuliffe
The David and Lucile Packard
Foundation

Rick Moyers
Eugene and Agnes E. Meyer Foundation

Annemarie Riemer
Hartford Foundation for Public Giving

Donna Stark
The Annie E. Casey Foundation

Peter Taylor
Maine Community Foundation

Mailee Walker
Claneil Foundation

Gayle Williams
Mary Reynolds Babcock Foundation

Linda Wood, Chair
Evelyn and Walter Haas, Jr. Fund

Learning Committee

Fatima Angeles
The California Wellness Foundation

Tanya Beer
The Colorado Trust

Gale Berkowitz
The David and Lucile Packard
Foundation (chair)

Ted Chen
W.K. Kellogg Foundation

Nelson Gonzalez
The Stupski Foundation

Astrid Hendricks
The California Endowment

Mary Kaplan
Endowment for Health

Jill Wohlford
Lumina Foundation for Education

Membership Committee

Jennifer Acree
The BEST Project

Catherine Brozowski
Orfalea Fund

Una Flannery Kelley
Nonprofit Finance Fund

LaTida Smith
Saint Luke's Foundation
of Cleveland, OH

Darryl Olson
Foellinger Foundation

Anne Vally
The James Irvine Foundation

Suzanne Walsh
formerly of Lumina Foundation
for Education

FINANCIAL SUPPORTERS

\$150K and above

The Edna McConnell Clark Foundation

Robert Wood Johnson Foundation

The William and Flora Hewlett Foundation

W. K. Kellogg Foundation

\$50K–\$149,999

The Annie E. Casey Foundation

Bill & Melinda Gates Foundation

The David and Lucile Packard Foundation

Evelyn and Walter Haas, Jr. Fund

Lumina Foundation for Education

S. D. Bechtel, Jr. Foundation

Surdna Foundation

\$20K–\$49,999

Blue Shield of California Foundation

Bruner Foundation

F.B. Heron Foundation

The James Irvine Foundation

STATEMENTS OF FINANCIAL POSITION

December 31, 2009 and 2008

	2009	2008
ASSETS		
Cash and cash equivalents	\$1,049,970	\$1,409,063
Contributions receivable	424,500	275,000
Investments ¹	352,834	–
Membership dues receivable	6,500	6,050
Prepaid expenses	18,886	15,411
Deposits	14,886	14,886
Other assets	5,868	1,536
Property and equipment, net	224,902	285,289
Total assets	<u>\$2,098,346</u>	<u>\$2,007,235</u>
LIABILITIES AND NET ASSETS		
<i>Liabilities</i>		
Accounts payable and accrued expenses	\$53,705	\$52,854
Accrued leave	31,732	33,086
Deferred membership dues	105,210	40,975
Deferred conference registration ²	226,561	–
Deferred rent	74,898	86,785
Other liabilities	5,250	–
Total liabilities	<u>\$497,356</u>	<u>\$213,700</u>
<i>Net assets</i>		
Unrestricted		
Undesignated	\$444,835	\$642,818
Board designated reserve	750,000	650,000
Total unrestricted	\$1,194,835	\$1,292,818
Temporarily restricted ³	406,155	500,717
Total net assets	<u>\$1,600,990</u>	<u>\$1,793,535</u>
Total liabilities and net assets	<u>\$2,098,346</u>	<u>\$2,007,235</u>

STATEMENTS OF ACTIVITIES

December 31, 2009 and 2008

	2009	2008
REVENUE AND SUPPORT		
Grants and contributions	\$685,240	\$1,267,025
Membership fees	603,140	679,515
Conference sponsorship	145,500	82,500
Conference registrations ⁴	–	455,546
Action learning	74,467	77,400
Seminars	–	20,703
Consulting	39,845	17,289
Publications	1,834	3,846
Contributed services	3,385	2,070
Interest income	10,811	27,239
Sublease rent	8,750	–
Other income	3,270	4,944
Total revenue and support	<u>\$1,576,242</u>	<u>\$2,638,077</u>
EXPENSES		
Program services		
Member programs	\$770,694	\$981,643
Conferences	187,384	442,409
Research	50,252	126,455
Communications	191,322	262,509
Action learning	85,535	163,702
Total program services	<u>\$1,285,187</u>	<u>\$1,976,718</u>
Supporting services		
Management and general	\$414,379	\$309,515
Fundraising	69,221	86,891
Total supporting services	483,600	396,406
Total expenses	<u>\$1,768,787</u>	<u>\$2,373,124</u>
Changes in net assets	(\$192,545)	\$264,953
Net assets, beginning of year	1,793,535	1,528,582
Net assets, end of year	<u><u>\$1,600,990</u></u>	<u><u>\$1,793,535</u></u>

¹ Investments in government-backed securities

² Registrations for the 2010 national conference

³ Includes temporarily restricted assets for program and operating support for 2010 – 2012

⁴ No conference held

GEO Members

Alberta Ecotrust Foundation
Alberta Real Estate Foundation
Allegheny Franciscan Ministries, Inc.
The Aloha Foundation
American Eagle Outfitters Foundation
American Society for the Prevention of
Cruelty to Animals
The Annie E. Casey Foundation
Arcus Foundation
Arizona Community Foundation
Arts and Humanities Council of
Montgomery County
ASB Community Trust
The Aspen Institute
The Assisi Foundation of Memphis, Inc.
Associated Grant Makers, Inc.
THE ASSOCIATED: Jewish Community
Federation of Baltimore
Association of Small Foundations
ASU Lodestar Center for Philanthropy
and Nonprofit Innovation
Atlanta Women's Foundation
The Atlantic Philanthropies
The AVI CHAI Foundation
Bank of America Charitable Foundation
Bank of America, Philanthropic Management
Barr Foundation
Bayview Hunter's Point Community Fund
Bertelsmann Stiftung
BEST Nonprofit Project
Bill & Melinda Gates Foundation
Blue Cross and Blue Shield of
Minnesota Foundation
Blue Cross Blue Shield of
Michigan Foundation
Blue Ridge Foundation New York
Blue Shield of California Foundation
The Boston Foundation
The Brainerd Foundation
The Brico Fund
Bruner Foundation
Bush Foundation
California Community Foundation
California Dental Association Foundation
The California Endowment
The California Healthcare Foundation
The California Wellness Foundation
The Cameron Foundation
Campion Foundation
The Case Foundation
Cedarmere Foundation
The Center for Effective Philanthropy
The Centre for Sustainability
Charities Aid Foundation (UK)
Charles and Lynn Schusterman
Family Foundation
Charles Stewart Mott Foundation
The Chasdrew Fund
Cherokee Preservation Foundation
Chesapeake Bay Trust
The Chicago Community Trust
Claneil Foundation

Clarence E. Heller Charitable Foundation
The Clark Foundation
The Cleveland Foundation
The Clowes Fund, Inc.
CME Group Foundation
The Coleman Foundation
The Colorado Trust
The Columbus Foundation
Common Good Ventures
Commonwealth Foundation Inc.
Community Clinics Initiative
The Community Foundation for
Greater Atlanta
The Community Foundation for
Greater New Haven
Community Foundation for Monterey County
The Community Foundation of
Greater Birmingham
Community Foundation of Greater Memphis
The Community Foundation of
Herkimer & Oneida Counties
Community Foundation of Santa Cruz County
Community Foundation of
South Wood County
The Community Foundation of
Westmoreland County
Community Foundation Sonoma County
Community Memorial Foundation
Council of Michigan Foundations
Council on Foundations
The Cricket Island Foundation
Daisy Marquis Jones Foundation
The Daphne Foundation
The David and Lucile Packard Foundation
DC Children & Youth Investment
Trust Corporation
Deaconess Community Foundation
Deaconess Foundation
Dean & Margaret Leshar Foundation
Delaware Valley Grantmakers
Donors Forum
Donors Forum of Wisconsin
Doris Duke Charitable Foundation
The Duke Endowment
The Durfee Foundation
Dwight Stuart Youth Foundation
Dyson Foundation
Echoing Green
The Edna McConnell Clark Foundation
Education Matters
Endowment for Health
Environmental Support Center
The Erie Community Foundation
The Eugene and Agnes E. Meyer
Foundation
Eurasia Foundation
Evelyn and Walter Haas, Jr. Fund
The F.B. Heron Foundation
The Fetzer Institute
Fieldstone Foundation
Fine Foundation
First 5 Alameda County
First 5 LA
First 5 San Bernardino

First 5 Sonoma County
Fleishhacker Foundation
Flintridge Operating Foundation
Foellinger Foundation
The Forbes Funds
Ford Foundation
Forum of Regional Associations
of Grantmakers
Foundation Center
Foundation for Young Australians
Foundations of East Chicago
French American Charitable Trust
Fund for Nonviolence
Gateway Center for Giving
Gaylord & Dorothy Donnelley Foundation
George Cedric Metcalf Charitable
Foundation
The Gifford Foundation
The Global Fund for Children
GMA Foundations
Gordon and Betty Moore Foundation
The Grable Foundation
Grand Rapids Community Foundation
Grand Victoria Foundation
Grantmakers for Education
Grantmakers in Health
Grantmakers of Oregon and
Southwest Washington
The Grantmaking School
The Greater Cedar Rapids
Community Foundation
Greater New Orleans Foundation
Greater Worcester Community Foundation
Greenlee Family Foundation
Gulf Coast Community Foundation of Venice
Hallmark Corporate Foundation
Harold K.L. Castle Foundation
Hartford Foundation for Public Giving
The Harvest Foundation of the Piedmont
Hawai'i Community Foundation
The Health Foundation of Central
Massachusetts
The Heinz Endowments
Hogg Foundation for Mental Health
Howard County Department of
Citizen Services
Huey and Angelina Wilson Foundation
The Hyams Foundation
Icicle Fund
The Impact Foundation
Institute for Philanthropy
International Development Research Centre
The Irene E. & George A. Davis Foundation
Jacob and Hilda Blaustein Foundation
The Jacob and Valeria Langeloth Foundation
The James Irvine Foundation
Jessie Ball duPont Fund
Jessie Smith Noyes Foundation
Jewish Community Federation of
San Francisco, the Peninsula, Marin
and Sonoma Counties
Jewish Funders Network
Jim Joseph Foundation

John Muir/Mt. Diablo Community Health Fund
 John Rex Endowment
 The John R. Oishei Foundation
 John S. and James L. Knight Foundation
 John T. Vucurevich Foundation
 Johnson Family Foundation
 JVA Consulting, LLC
 The J.W. McConnell Family Foundation
 Kansas Health Foundation
 The Kate B. Reynolds Charitable Trust
 The Kenneth A. Picerne Foundation
 Kronkosky Charitable Foundation
 Laidlaw Foundation
 Lancaster County Community Foundation
 Legacy Foundation
 The Leighty Foundation
 The Lodestar Foundation
 Lotte & John Hecht Memorial Foundation
 Lucile Packard Foundation for Children's Health
 Lumina Foundation for Education
 The Lumpkin Family Foundation
 Maine Community Foundation
 Maine Health Access Foundation
 Management Assistance Group
 Marguerite Casey Foundation
 Marin Community Foundation
 The Marion I. & Henry J. Knott Foundation
 Mary Black Foundation
 Mary Reynolds Babcock Foundation
 Massachusetts Cultural Council
 Mathile Family Foundation
 M. A. Toni Moreno
 McAuley Ministries
 Medina Foundation
 MetroWest Community Health Care Foundation
 Meyer Memorial Trust
 Milton A. & Charlotte R. Kramer Charitable Foundation
 Minnesota Council on Foundations
 The Morris and Gwendolyn Cafritz Foundation
 Moses Cone-Wesley Long Community Health Foundation
 Movement Advancement Project
 Ms. Foundation for Women
 The Muttart Foundation
 National Arts Strategies
 Nebraska Children and Families Foundation
 The Needmor Fund
 NeighborWorks America
 Nellie Mae Education Foundation
 New Hampshire Charitable Foundation
 New Place Fund
 New Profit Inc.
 New Venture Fund
 New York State Health Foundation
 Nokomis Foundation
 Nonprofit Finance Fund
 Nonprofit Management Fund
 The Nonprofit Partnership
 Northern California Grantmakers
 Northwest Area Foundation
 Northwest Health Foundation
 Ohio Grantmakers Forum
 OMG Center for Collaborative Learning
 OneStar Foundation
 Ontario Ministry of Citizenship and Immigration
 Ontario Trillium Foundation
 Open Society Institute
 Orfaea Fund
 Ottinger Foundation
 Pact
 The Panasonic Foundation
 Panta Rhea Foundation
 Partnership for Excellence in Jewish Education
 The Patterson Foundation
 The Paul J. Aicher Foundation
 The Peter and Elizabeth C. Tower Foundation
 The Pew Charitable Trusts
 Philadelphia Cultural Management Initiative
 The Philanthropic Initiative
 Philanthropy New Zealand
 Philanthropy Northwest
 The Pittsburgh Foundation
 Polk Bros. Foundation
 Program to Aid Citizen Enterprise
 The Prudential Foundation
 Public Interest Projects
 Quantum Foundation
 Quixote Foundation
 The Rapides Foundation
 Rappahannock United Way
 The Raymond John Wean Foundation
 REACH Healthcare Foundation
 REDF
 The Retirement Research Foundation
 RGK Foundation
 Richard & Susan Smith Family Foundation
 Richard King Mellon Foundation
 Richard M. Fairbanks Foundation, Inc.
 Robert Wood Johnson Foundation
 Robin Hood Foundation
 Robins Foundation
 The Rockefeller Foundation
 Rockefeller Philanthropy Advisors
 Rogers Family Foundation
 Root Cause
 Ruth Mott Foundation
 Saint Luke's Foundation of Cleveland, Ohio
 The Samberg Family Foundation
 The San Diego Foundation
 San Diego Grantmakers
 The San Francisco Foundation
 San Luis Obispo County Community Foundation
 Santa Barbara Foundation
 Saxon Family Fund
 The Schimmel Lode
 S.D. Bechtel, Jr. Foundation
 Sea Change Foundation
 The Seattle Foundation
 S.H. Cowell Foundation
 Sheryl Johns
 Siebert Lutheran Foundation
 Sierra Health Foundation
 The Skillman Foundation
 Skoll Foundation
 Sobrato Family Foundation
 Social Venture Partners Arizona
 Social Venture Partners International
 Social Venture Partners Seattle
 South Dakota Community Foundation
 Southeastern Council of Foundations
 Southern California Grantmakers
 Southern Louisiana Grantmakers Forum
 Southern Partners Fund
 The Staten Island Foundation
 Staunton Farm Foundation
 Stella and Charles Guttman Foundation
 Stupski Foundation
 The Summit Foundation
 Sunflower Foundation
 Surdna Foundation
 Taproot Foundation
 TCC Group
 Telstra Foundation
 Texas High School Project
 Third Sector New England
 Third Wave Foundation
 Tides Foundation
 Toledo Community Foundation
 TomKat Charitable Trust
 The Tony R. Wells Foundation, Inc.
 The Tow Foundation
 United Methodist Health Ministry Fund
 United Way of Canada — Centraide Canada
 United Way of Greater Rochester
 United Way of the Bay Area
 United Way of Winnipeg
 United Way Toronto
 Venture Philanthropy Partners
 Vine & Branches Foundation
 Virginia Tobacco Settlement Foundation
 Wachovia Regional Foundation
 The Wallace Alexander Gerbode Foundation
 Walter and Elise Haas Fund
 Washington Area Women's Foundation
 The W. Clement & Jessie V. Stone Foundation
 Weingart Foundation
 Wellspring Financial Advisors, LLC
 The Whitman Institute
 Wilburforce Foundation
 The William and Flora Hewlett Foundation
 The William Bingham Foundation
 William Caspar Graustein Memorial Fund
 William Penn Foundation
 W. K. Kellogg Foundation
 The Women's Foundation of California
 Woods Charitable Fund
 Y & H Soda Foundation
 ZeroDivide
 Z. Smith Reynolds Foundation



We envision a future in which:

Grantmakers embrace strategies and practices that are supportive of nonprofit performance and abandon those that detract from nonprofit success.

In common trust, grantmakers and grantees communicate promptly and candidly to define and assess success, share learning and accelerate progress.

Grantmakers and grantees exchange financial resources and knowledge efficiently and effectively.

Nonprofits have the leadership, systems and working capital they need to be potent agents of social change and public benefit.

United by a common purpose, grantmakers and nonprofits are mutually supportive and accountable partners in creating social change and public benefit.

Our assumptions & core beliefs:

The status quo in philanthropy is unacceptable; change is imperative.

Change is driven by both individual and collective action:

- ▷ All individuals in philanthropy can play powerful roles in bringing about significant changes in grantmaker practice.
- ▷ Collective action can speed the pace of innovation into mainstream practice.

Successful change efforts require more than just knowledge and awareness — they require a high degree of motivation and support, backed by the right incentives.

Effective philanthropy requires engaging a broad range of historically disenfranchised people meaningfully in both developing and executing strategy.

Incorporating feedback from grantees and other stakeholders is crucial to grantmakers' effectiveness.

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