



1725 DeSales St. NW, Suite 404 / Washington, DC 20036
tel: 202.898.1840 fax: 202.898.0318 web: www.geofunders.org



Smarter grantmaking isn't just nice ... it's a necessity.
Join hundreds of grantmakers in Pittsburgh,
April 12-14, 2010, as we explore how to unleash
philanthropy's potential at GEO's next national conference.
Visit www.geofunders.org for more information.

GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS 2008 ANNUAL REPORT

TEN YEARS OF SMARTER GRANTMAKING, STRONGER NONPROFITS, BETTER RESULTS.



Ten years ago, a handful of visionary foundation leaders saw a need for a place where grantmakers committed to improving organizational effectiveness could convene to share knowledge and best practices, and inspire their colleagues to act. Today, Grantmakers for Effective Organizations is a powerful coalition of more than 2,000 individual members representing 350 grantmaking organizations committed to building strong and effective nonprofit organizations.

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. This annual report tells the story of our work in 2008, our 10th anniversary year.

To our members and partners who have been with us during the past 10 years, we salute you. To our prospective members, we hope you will join our movement and lend your voice to our next 10 years of work.

CONTENTS

- 1 Message from the Board Chair and President and CEO
- 2 Introduction
- 4 GEO's Work in Context: Our 2008 Field-Wide Study
- 7 Publications and Conferences
- 11 Action Learning Program
- 13 The Next Decade
- 13 Staff
- 14 Milestones 1997–2008
- 16 Financial Supporters
- 16 Financial Statements
- 18 Board of Directors
- 18 GEO Members
- 21 Mission, Vision, Assumptions and Core Beliefs

DESIGN: HAIRPIN COMMUNICATIONS

Message from the Board Chair and President and CEO

2008 was a momentous year for our country and our world.

In the United States, an historic election inspired and engaged millions of citizens. At the same time, the impact of the severe economic downturn became increasingly apparent. For many, the year concluded with a tidal wave of hope, tempered by significant fear about our country's future.

The challenges of 2008 brought with them opportunities and highlighted the vital mission of Grantmakers for Effective Organizations. Once again grantees are being asked to do more with less, and GEO's efforts to increase nonprofit effectiveness are more critical than ever. Grantmaking must be as smart as possible, so that nonprofits can be as strong as possible, so that collectively we deliver the best results possible.

Identifying and promoting changes grantmakers can make to help nonprofits be more effective has always been the crux of GEO's work. In our 10th anniversary year, GEO celebrates the pioneering grantmakers, our members, who recognize that their relationship with grantees is a *partnership*. We salute these foundations dedicated to sharing their knowledge and experiences and changing their practices to improve their own effectiveness and that of the nonprofits they support. We've made some good progress, but there is much to be done.

Is Grantmaking Getting Smarter?, a field-wide study conducted by GEO in 2008, reveals that most foundations are not making the changes both they and their grantees agree are essential to supporting nonprofit success. This gap is especially evident in two critical areas: improving the type of financial support foundations provide (e.g., multiyear grants and operating grants) and working in a partnership with grantees.

The good news from the study is that GEO members are more likely to "walk the talk"—engage in practices that support nonprofit effectiveness.

By continuing to explore these and other critical issues of philanthropic practice in our next decade, GEO will help grantmakers bridge the gap between talk and practice. We'll continue to rely on our members—the lifeblood of GEO—to **generate knowledge** about organizational effectiveness, **identify promising practices** for grantee success and **share our findings** on how to strengthen the nonprofit sector. Together, we will continue to have an impact.

It is a special privilege to be able to thank our members for their contributions to GEO's mission during our 10th anniversary year. And it is with great excitement and confidence about the opportunities ahead that we invite new partners to come on board. We look forward to working with you in 2009 and beyond.



Beth Bruner

Beth Bruner
Board Chair

Director of Effectiveness Initiatives
Bruner Foundation



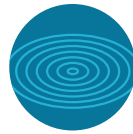
Kathleen Enright

Kathleen Enright
President and CEO

Grantmakers for Effective Organizations

INTRODUCTION

GEO's Vision: Smarter Grantmaking. Stronger Nonprofits. Better Results.



While meaningful improvements in grantmakers' work take many forms, one thing is certain: grantmakers are successful only to the extent that the nonprofits they support achieve meaningful results. Grantmaker success requires that grantmakers engage their grantees as true partners, reflect on how everything they do can be targeted toward helping grantees achieve more and invest in creating sustainable organizations. This is GEO's brand of smarter grantmaking.

It is also the sum of GEO's learning through the past decade, encapsulated in our new tagline:

Smarter grantmaking. Stronger nonprofits. Better results.

These six simple words embody the past, present and future of GEO. An organization that began as a small cohort of grantmakers has grown into a movement committed to a simple but profound concept: grantmaker success relies on the success of its grantees. The stronger the partnership, the greater the results nonprofits will achieve.

For 10 years, GEO has supported grantmakers in their efforts to help nonprofits achieve better results in three ways:

1. GEO fosters knowledge to support skillful grantmaking practice;
2. GEO promotes collaborative learning to empower grantmakers to make better-informed decisions; and
3. GEO builds momentum for the adoption of effective grantmaking practices that will help transform the entire philanthropic sector.

Throughout this annual report, we share with you news on how GEO has helped to facilitate smarter grantmaking, and the results we have achieved in 2008. We also offer a few snapshots of our journey throughout the past 10 years and some of the lessons we have learned along the way.

We begin with an overview of GEO's 2008 survey of current field practices, *Is Grantmaking Getting Smarter? A National Study of Philanthropic Practice*. This research helped guide our thinking and chart our course in 2008 and beyond. The findings indicate that the practices GEO promotes are important to effectiveness. What's lagging is the action — that is, translating this belief into real change in behavior, programs and policies. GEO's challenge now is to explore carefully the barriers to action and provide the encouragement and support that will enable grantmakers to overcome them.

We then report on each of two broad areas of GEO work. GEO's **publications and conferences** are critical to our efforts to foster knowledge and raise awareness among our members and in the philanthropic field more broadly. GEO's **action learning** programs use peer groups and skill-building seminars to support practitioners engaging in more effective philanthropic practices and facilitate their sharing of more effective philanthropic practices with their peers.

The journey and accomplishments of 2008 — and indeed of GEO's past 10 years of work — revolve around our members' core belief in the need for knowledge, confidence in the power of collaborative learning and vision that we can, indeed, help lead the entire philanthropic sector toward smarter and more effective grantmaking.

What GEO Members Say

GEO members fuel GEO's work and enable us to advance our mission. In return, GEO members say they receive many benefits. GEO membership helps grantmakers:

- ▷ Act in the best interests of their grantees.
- ▷ Make the case for improvements in practice within their organizations.
- ▷ Engage stakeholders more meaningfully.
- ▷ Learn from their peers and their nonprofit partners.

How does GEO deliver these results? Through GEO gatherings, members come together with peers to address shared challenges in grantmaking. Through the GEO Web site and listserv, members build their online network. Through GEO's cutting-edge content, members stay apprised of the latest developments in the field.

For information on membership, visit www.geofunders.org.

Snapshot of GEO Members

Member organizations – 350

Individuals at member organizations – 2,066

Number of member organizations that have been part of a GEO committee or advisory group during the past five years – 100

GEO's Work in Context: Our 2008 Field-Wide Study

Is Grantmaking Getting Smarter? A National Study of Philanthropic Practice

In 2008, GEO commissioned Harder+Company Community Research to conduct a field-wide study of the state of philanthropy in the United States. We wanted to gauge what progress our members and the field had made in the last five years in how we support nonprofit effectiveness.

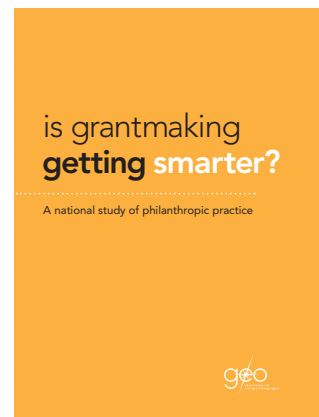
The research indicated that most foundations are not making changes they and their grantees say are essential to supporting nonprofit success, but there is evidence of a gradual shift to more nonprofit-friendly practices.

Is Grantmaking Getting Smarter? A National Study of Philanthropic Practice was the second comprehensive study of the attitudes and practices of staffed grantmaking foundations in the United States. It built on a similar study conducted in 2003 by the Urban Institute in partnership with GEO and funded by the David and Lucile Packard Foundation.

Despite efforts in some foundations to shift to more nonprofit-friendly practices, a pronounced disconnect remains between the ways in which grantmakers are supporting nonprofits and what nonprofits say could contribute most to their success. Further, many grantmakers have not adopted practices that they themselves see as important for effective grantmaking.

In the years leading up to the survey, GEO engaged with hundreds of grantmakers and nonprofit leaders in interviews and focus groups as part of its Change Agent Project. Asked which grantmaking practices are most likely to have a positive impact on nonprofits' ability to achieve results, grantmakers and nonprofits agreed on three top priorities:

1. Provide more general operating support
2. Provide more multiyear support
3. Work in a supportive and respectful relationship with grantees



GEO's national study indicates slow shift to nonprofit-friendly practices.

In other words, a consensus emerged that grantmaking needs to get better in two areas: *the money* and *the relationship*. The study found that **walk trails talk** in these areas (*see statistics in box to right*).

Still, some hopeful signs also emerged from the research. Even as progress across the foundation field has been slow generally, there is evidence of a continued movement of grantmakers committed to shifting to more nonprofit-friendly grantmaking practices. The survey identified two characteristics of such grantmakers. First — in perhaps the study's most striking finding — they are significantly more likely to have staff and board members with nonprofit experience.

Second, members of the GEO community are significantly more likely to model the attitudes and practices we believe better support nonprofit performance.

▷ More than half of GEO members (53 percent) in the survey indicated they make multiyear grants of two years or longer often or always, compared to less than a quarter of nonmembers (23 percent). One-fifth of GEO members (21 percent) never or rarely make multiyear grants, compared to 43 percent of nonmembers.

▷ More than three-quarters of members (78 percent) indicated that it is very important for their organization to solicit advice from those outside it, compared to just under half of nonmembers (49 percent).

The results of *Is Grantmaking Getting Smarter?* informed GEO's work in 2008 and will continue to guide our thinking and our programs in the years ahead. We will implement programs that aim to close the gap between espoused ideals in grantmaking and actual practice. We were gratified to learn that grantmakers with nonprofit-friendly practices are apt to be in GEO's tent (and reminded how critical it is to engage more foundations in our work).

Walk Trails Talk

Key findings from GEO's field-wide study

▷ Among those who said that it's "very important" for their foundation to have strong organizational infrastructure in order to be effective, nearly one-third (29 percent) did not support grantee capacity-building activities.

▷ Among those who rated soliciting advice from those outside their organization as "very important" to foundation effectiveness, fewer than half (47 percent) solicited grantee feedback through surveys, interviews or focus groups during the past two years.

Ineffective Grantmaking Practices

Key findings from GEO's field-wide study

▷ Grantmakers are devoting a median of 20 percent of their annual grantmaking dollars to general operating support.

▷ Less than one-quarter (24 percent) of foundations say their grants often or always include appropriate overhead.

▷ Fewer than four out of 10 respondents (36 percent) reported soliciting feedback from grantees through surveys, interviews or focus groups.



GEO IS BORN ...
BY "CATCHING THE TAIL OF A COMET"

In the late 1990s, three philanthropic leaders got to talking. Barbara Kibbe was running the Organizational Effectiveness and Philanthropy Program at the David and Lucile Packard Foundation; Janine Lee was working as a senior leader at the Ewing Marion Kauffman Foundation; and Jim Canales was vice president and corporate secretary at the James Irvine Foundation.

Their conversation was about organizational effectiveness and the role grantmakers played in supporting their grantees. Kibbe, Lee and Canales realized they were part of an emerging group of funders who cared deeply about these questions, and recognized that a venue for discussing common issues, sharing best practices, learning from their peers and engaging one another was desperately needed in order to build this nascent field.

The team and their colleagues spotlighted the basics, asking: How can we build more support for nonprofit capacity building, general operating funds and other strategies focused on nonprofit effectiveness? Their questions swept the field like a steady fire and led to GEO's birth.

Nearly three hundred people attended the first GEO conference. "We knew we were on to something," Janine Lee recalled. "But we never imagined GEO would achieve the scale it is now. Sometimes you just have to catch the tail of a comet and go."

GEO Publications and Conferences

Fostering Knowledge: Raising Awareness

GEO's efforts are driven by the belief that our community holds within it many of the answers to the challenges we face. Our role is to synthesize the best information available and make it broadly accessible. GEO focuses on what we — as a community of committed and thoughtful grantmakers — have the power to change individually and collectively.

GEO's Change Agent Project, which ran from 2004 to 2006, embodied our commitment to engagement and learning as a precursor to action. Through this national engagement process we asked: Where can changes in grantmakers' practice make the greatest difference? From surveys, interviews and focus groups with more than 200 nonprofits and grantmakers, we identified the most promising opportunities for grantmakers to make changes that will contribute to nonprofit results.

Two clear areas of focus emerged: **money** and **stakeholder engagement**. These were added to our priorities along with **leadership development** and **learning for improvement**, previously part of our agenda. To advocate for change, GEO provides its members with resources and learning opportunities to help inform their practice in these four areas.

GEO Priorities: Four Areas for Smarter Grantmaking

Challenging the status quo is rarely easy, especially in a field traditionally resistant to change. But we believe that smarter grantmaking leads directly to stronger nonprofits and better results. To advocate for change, GEO provides its members resources and networking opportunities to help them improve in four areas:

Learning for Improvement: GEO helps grantmakers and their grantees establish key learning strategies, build a learning culture and develop learning programs to transform the causes and communities they care about.

Leadership Development: GEO helps grantmakers nurture skilled leaders and leadership teams as a means of building nonprofit performance.

The Money: GEO promotes grantmaker practices aimed at strengthening grantees' financial sustainability, including longer-term funding, general support grants and less red-tape for grantees.

Stakeholder Engagement: Because complex social problems can be addressed only when all affected parties come together to identify problems and generate solutions, GEO encourages grantmakers to engage grantees and members of the community in their work.

GEO PUBLICATIONS

GEO publications are a primary vehicle for elevating shared knowledge and profiling those pioneers in our community who are effecting positive change in philanthropy. They educate our members and provide concrete strategies for taking action. They also help us reach new change-makers, as members often share GEO publications with colleagues in their communities and their fields.

In 2008, GEO released five publications.

General Operating Support Vol. 2: Assessing the Impact (October 2008) discusses two approaches to assessing the impact of general operating support grants: one that emphasizes pre-grant assessment and one that relies on assessment during and after the grant.

Action Guide: *Supporting Next-Generation Leadership* (March 2008). As founders move on, nonprofits, their grantmakers and their stakeholders have become increasingly concerned about who will take the reins. This action guide explores the role grantmakers can take in attracting, developing and retaining the next generation of nonprofit leadership.

Action Guide: *Imagine, Involve, Implement* (January 2008). Real change is happening in philanthropy as pioneering grantmakers find new ways to break down the traditional barriers standing in the way of nonprofit success. This report on the second phase of GEO's Change Agent Project describes how diverse grantmakers are changing core practices and approaches by involving a range of stakeholders in their work.

Investing in Leadership: Discussion Guide for Grantmakers (January 2008). This discussion guide, based on content from GEO's Investing in Leadership publications, helps direct conversations with board members, foundation staff and grantees, and focuses on how to understand what a grantee needs in terms of leadership support.

Is Grantmaking Getting Smarter? A National Study of Philanthropic Practice (December 2008) is GEO's 2008 field-wide study of philanthropic practices (described in detail on p. 4–5)



Ten Years of GEO Publications

Ten years ago, when GEO launched the conversation about the role of grantmakers in increasing organization effectiveness, we knew we needed tools to build the movement. GEO publications deliver content our members need to engage and mobilize their board members, staff and grantees toward smarter grant-making. From *The Due Diligence Tool* in 2004 (GEO's most popular publication of all time) to our provocative Action Guide series, GEO publications are respected in the field for their timely, concise, clear and, above all, practical information and concrete examples of what other grantmakers are doing in the field.

GEO Members Use GEO Publications

"The Panta Rhea Foundation joined GEO in early 2008. For us, GEO membership couldn't come at a more opportune time. We recently launched a new organizational development program, and have been using GEO resources — and the knowledge I gained at the 2008 national conference — to help shape it. The GEO Action Guide: *Imagine, Involve, Implement* is particularly helpful (and I ordered nine extra copies to distribute to my board members). Being part of the GEO community has already strengthened our foundation's work."

Diana Cohn, Executive Director, The Panta Rhea Foundation (GEO member since 2008)

"We are big fans of GEO's work and resources. I frequently use GEO's materials for training purposes and to inform my work. I recently shared *General Operating Support Vol. 2: Assessing the Impact* with a group of colleagues who are preparing a session on operating support for the Ohio Grantmakers Forum's annual conference. We all found it extraordinarily useful in shaping our program."

LaTida Lester, Senior Program Officer, Saint Luke's Foundation of Cleveland, Ohio (GEO member since 2001)

"Kathleen Enright's letter [of October 28, 2008] to GEO members on the immediate steps grantmakers might take to support nonprofits during the economic downturn was excellent. The letter was thoughtful, timely and targeted, and I circulated it immediately to The Cameron Foundation board of directors. Kathleen asked grantmakers to consider strategies that were absolutely on the mark. The document helped me work with my staff and board members as we discussed our responsibilities as a grantmaker, and then acted to support our grantees as effectively as possible during these difficult times."

Handy L. Lindsey, Jr., President, The Cameron Foundation (GEO member since 2006)

Real-Time Responsiveness

GEO is committed to providing practical and timely content for its members. For example, in October 2008, GEO President and CEO Kathleen Enright prepared a *letter to members on the economy*, its impact on nonprofits and suggestions for grantmaker response. The letter was widely circulated within and beyond the GEO community, enabling us to stimulate conversation on an issue as it was unfolding through the sector and the country.

GEO CONFERENCES

Like our publications, GEO conferences educate and inspire action. They allow our members and close associates of the GEO community to convene for the in-person sharing of best practices, debate and collaboration. In 2008, GEO held its biennial national conference, *Ideas to Action: Grantmaker Practices that Improve Nonprofit Results*, as well as an issue-specific convening, *Money Matters: Exploring a New Paradigm in Grantmaking*, in partnership with the Nonprofit Finance Fund.

Ideas to Action: Grantmaker Practices that Improve Nonprofit Results (March 2008)

The nonprofit sector is built on big ideas and visions of change. GEO's 10th anniversary 2008 national conference was our largest ever. *Ideas to Action: Grantmaker Practices that Improve Nonprofit Results* united 616 grantmakers to explore actions grantmakers can take to improve their support of nonprofit results and advance their visions of social change. Organized in partnership with Northern California Grantmakers, the conference took place at the Palace Hotel in San Francisco, March 10–12, 2008.

Money Matters: Exploring a New Paradigm of Grantmaking (October 2008)

Held in New York City from October 27–28, 2008 — just as the severity of the economic recession was becoming apparent — the *Money Matters* conference was a two-day event hosted by Grantmakers for Effective Organizations, the Nonprofit Finance Fund and the New York Regional Association of Grantmakers.

Attended by more than 175 grantmakers nationwide, this topical conference explored grantmaking strategies that can alleviate existing and anticipated financial stress on nonprofit organizations. The program challenged assumptions and current practices around funding nonprofits.



Ten Years of GEO Conferences

“From the first, GEO conferences served as a touchstone for an emerging movement. It all began in Monterey, Calif. in 1998 with 100 participants — a small community of funders and experts already committed to nonprofit capacity building and eager to define and refine the funder role. In 2008, the 10th anniversary conference was held in San Francisco and hosted 616 participants. Over the years, the community has grown larger and more constant than any of us anticipated at the outset. GEO conferences attract funders who are meaningfully self-reflective about their practice, who want to get the best results and to avoid handicapping their grantees with practices that inhibit their effectiveness. In short, the conferences reflect the heart and soul of GEO and its members.

“And GEO conferences have an undeniable buzz about them. They are open, transparent, energetic. They are the place where I recharge my batteries, learn about what my colleagues are doing on the issues I care about and dig deep into the problems we still confront. Every two years at the GEO national conference I am reminded once again of just how thoughtful and vital GEO and its members are.”

Barbara Kibbe, GEO Founder, and Vice President, Client Services, The Monitor Institute

GEO's Action Learning Program

Promoting Collaborative Learning: Empowering a Community, Inciting Action

How do you empower an entire community? How do you build a movement to bring changed practice into the mainstream?

Over the course of 10 years, GEO has recognized that the best learning occurs when innovative grantmakers collaborate with their peers, especially when they are tackling the problems that challenge them the most. This type of knowledge-building leads to stronger ideas, changed practice and a community that is empowered to lead even broader change in their field.

In 2007, GEO launched its Action Learning program to help our members translate what they know into improved practice. Through GEO **peer groups** and **skill-building seminars**, grantmakers facing similar problems and working under similar constraints come together to solve shared problems. Supported by light-touch but powerful facilitation, participants develop a shared understanding of their challenges and then identify and test promising practices to address them.

PEER GROUPS

Since 2007, GEO's Action Learning peer groups have addressed GEO's key content areas. For example:

- ▷ *Leadership*. How can grantmakers best strengthen synergies between investments in leadership with investments in organizational capacity building?
- ▷ *The Money*. How can grantmakers and grantees best demonstrate the success of general operating support?
- ▷ *Learning for Improvement*. What will it take to ensure that grantmaker knowledge is applied so as to increase the impact of grantmaking? How can we best leverage “failures” to improve the impact of our grantmaking?

Peer Group Participants Say ...

“[Unlike many grantmaker convenings], with this group, you go back home... you think about what you already have in your work plan and how you can apply what you learned to what you are already doing ... It has been a **great learning experience and a practical one that we are applying to our work.**”

“[Our] program was good but it wasn't working exactly right ... Like a doctor I was able to diagnose some of the ailments in this program and fix them. **It helped to have more minds and experience to diagnose the program.**”

“**It was beneficial that two of us from the same organization attended. It gave us an opportunity to talk through ideas and have the same language and experience to build off of when we returned.**”

SKILL-BUILDING SEMINARS

GEO's members have expressed particular eagerness for additional help and support around the topic of strengthening grantmaker-grantee partnerships. As a result, in 2008 GEO and the Interaction Institute for Social Change co-created **Engage for Results: Involving Grantees and Other Stakeholders in Your Grantmaking**. This skill-building seminar is open to any grantmaking staff wanting to learn how to make their grantmaking more effective by increasing the involvement of those most affected by it. Through a combination of small-group work, large-group discussion, interactive exercises and individual reflection over the course of two days, participants learn strategies for soliciting grantee feedback, incorporating the grantee perspective when setting priorities and building staff and boards that reflect the communities they serve.

GEO held the first of three pilot Engage for Results seminars on June 12 – 13, 2008, at the GEO offices in Washington, D.C., in partnership with the Council on Foundations. A second pilot, offered in San Francisco in partnership with Northern California Grantmakers, filled so quickly that GEO offered a third session there in December. Participants unanimously agreed that the skill-building session was a good use of their time and 95 percent indicated that they left the retreat with concrete ideas for how to involve grantees and other stakeholders in their grantmaking. The same number rated the overall seminar either valuable or very valuable.



Interaction with colleagues is a key component of the skill-building seminars.

GEOList

GEOList is GEO's member-only electronic community. Almost 2,000 listserv subscribers are free to ask questions, post announcements or share insights connected to philanthropy and nonprofit effectiveness. GEOList averages about five postings per month, and each posting receives replies from colleagues interested or expert in the subject raised.

The Next Decade

Building Momentum: Transforming a Field

Ten years ago, GEO began a conversation about capacity building and nonprofit effectiveness. That conversation took root and gave birth to an organization and a movement.

Our concept seemed straightforward — grantmakers' success can be measured by the strength of the organizations with which they partner. But as we and our members have explored this conversation further, we've realized its complexity. As a result, today GEO's work is more sophisticated. Our content areas are more diverse. And our programs dig more deeply into the issues we care about.

GEO's ability to address key barriers to successful grantmaker-grantee relationships is thanks to our membership. As we reflect on our past 10 years of work and consider our road ahead, we know our members make us who we are.

At the crux of our mission and programs is the knowledge that our members are philanthropy's current and future change agents. The GEO network develops and amplifies the discourse on effective grantmaking. In the years ahead, we will work to deepen our partnerships with our individual members, as well as regional associations, affinity groups and other key organizations.

As we deepen our work and our partnerships, we also hope to expand them. We are committed to bringing more philanthropic leaders into the GEO tent. To do this, we depend on our current members to spread the word of GEO's mission and merits to your colleagues.

In 2009, we charge each of our members to bring one prospective member to a GEO event, or share with one colleague a GEO publication. It's the personal communication about the critical voice that GEO brings to the field that will allow us to continue and expand our efforts and bring change to our sector.

STAFF

Leonor Alfonso
Program Specialist

Madhu Arora
Marketing and Communications
Specialist

Lori Bartczak
Manager of Content Development

Courtney Bourns
Director of Programs

Kathleen 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
Special Projects Coordinator,
Office of the President and CEO



MILESTONES 1997-2008

10 Years of Smarter Grantmaking, Stronger Nonprofits, Better Results

1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008																							
<p>GEO is founded; Barbara Kibbe is founding steering committee chair</p>	<p><i>3-in-1 Colloquium</i>, October 1998, Monterey, 292 attendees, held in partnership with the Communications Network and the Technology Affinity Group</p>	<p><i>High Performance Organizations: Linking Evaluation & Effectiveness</i>, March 2000, held in partnership with Grantmakers Evaluation Network, 300+ attendees</p>	<p>Kathleen Enright, GEO's first executive director, is hired, December 2001</p>	<p>GEO merges with Grantmakers Evaluation Network, October 2002</p> <p>GEO receives 501(c)(3) status, 2002</p> <p><i>Capacity Building for Impact</i>, Washington, D.C., March 2002, held in partnership with the Forum of Regional Associations of Grantmakers and Grantmakers Evaluation Network, 550 attendees</p> <p>GEO partners with Fieldstone Alliance (formerly the Amherst Wilder Foundation) to co-publish a series of grantmaker guides</p>	<p>GEO board develops organizational theory of change, 2003</p> <p>GEO launches new program areas around evaluation and knowledge management, 2003</p> <p>First GEO member survey</p>	<p><i>Aligning for Results</i>, Seattle, March 2004, held in partnership with the Forum of Regional Associations of Grantmakers and Philanthropy Northwest, 500 attendees</p> <p><i>Levenaging What You Know: Knowledge Management Strategies for Funders</i>, March 2004 in Seattle, held in partnership with the Communications Network, the Consortium of Foundation Libraries, and Technology Affinity Group, 100 attendees</p> <p>GEO partners with the Urban Institute and the David and Lucile Packard Foundation on the first national assessment of philanthropic practice and effectiveness, <i>Attitudes and Practices Concerning Effective Philanthropy</i></p> <p>GEO publishes research on funder networks, conducted in partnership with the Council on Foundations, the Forum of Regional Associations of Grantmakers, and Funders' Network for Smart Growth and Livable Communities</p>	<p><i>Funding Them To Fish: Funder Conference on Nonprofit Sustainability</i>, May 2005 in Sundance Village, Utah, in partnership with Social Enterprise Alliance, 60 attendees</p> <p><i>Building Learning Organizations</i>, May 2005 in Boston, held in partnership with the Communications Network, the Consortium of Foundation Libraries, Grants Managers Network, and Technology Affinity Group, 175 attendees</p> <p>GEO launches Change Agent Project</p> <p>GEO's board adopts the mantra, "Grantmakers are effective only to the extent their grantees achieve meaningful results."</p>	<p><i>Powerful Partnerships</i>, March 2006, Atlanta, 425 attendees</p> <p>GEO publishes <i>Investing in Leadership Volume 2: Inspiration and Ideas from Philanthropy's Latest Frontier</i></p>	<p><i>Learning for Results</i>, May 2007 in New Orleans, held in partnership with the Communications Network, the Consortium of Foundation Libraries, the Council on Foundations, Grants Managers Network, and Technology Affinity Group, 175 attendees</p> <p>GEO launches Action Learning Program</p> <p>GEO publishes <i>Listen, Learn, Lead: Grantmaker Practices that Support Nonprofit Results</i>, a report on phase 1 of GEO's Change Agent Project</p> <p>GEO publishes <i>General Operating Support Action Guide</i></p>	<p><i>Ideas to Action</i>, March 2008, San Francisco, held in partnership with Northern California Grantmakers, 616 attendees</p> <p><i>Money Matters</i>, October 2008, New York City. Held in partnership with Nonprofit Finance Fund and New York Regional Association of Grantmakers, 175 attendees</p> <p>GEO publishes <i>Imagine, Involve, Implement: Transforming Grantmaker Practices for Improved Nonprofit Results</i>, an Action Guide based on findings from phase 2 of GEO's Change Agent Project</p> <p>GEO launches second field practices survey, <i>Is Grantmaking Getting Smarter?</i></p>	U.S. Foundation Assets \$329.9 billion	U.S. Foundation Assets \$385 billion	U.S. Foundation Assets \$448.6 billion	U.S. Foundation Assets \$495.6 billion	U.S. Foundation Assets \$476.8 billion	U.S. Foundation Assets \$435.3 billion	U.S. Foundation Assets \$476.7 billion	U.S. Foundation Assets \$510.5 billion	U.S. Foundation Assets \$550.5 billion	U.S. Foundation Assets \$614.7 billion	U.S. Foundation Assets \$669.5 billion*							66 Members	95 Members	189 Members	215 Members	270 Members	315 Members	350 Members
U.S. Foundation Assets \$329.9 billion	U.S. Foundation Assets \$385 billion	U.S. Foundation Assets \$448.6 billion	U.S. Foundation Assets \$495.6 billion	U.S. Foundation Assets \$476.8 billion	U.S. Foundation Assets \$435.3 billion	U.S. Foundation Assets \$476.7 billion	U.S. Foundation Assets \$510.5 billion	U.S. Foundation Assets \$550.5 billion	U.S. Foundation Assets \$614.7 billion	U.S. Foundation Assets \$669.5 billion*																								
					66 Members	95 Members	189 Members	215 Members	270 Members	315 Members	350 Members																							

*Source for Foundation Assets: The Foundation Center. Figure estimated for 2007 and not yet available for 2008.

FINANCIAL SUPPORTERS

\$100K and above
Bill & Melinda Gates Foundation
The Edna McConnell Clark Foundation
Evelyn and Walter Haas, Jr. Fund
Omidyar Network
Robert Wood Johnson Foundation
The William and Flora Hewlett Foundation
W. K. Kellogg Foundation
\$50K–\$99,999
Bruner Foundation
The California Endowment
The David and Lucile Packard Foundation
The Heinz Endowments
Lumina Foundation for Education
Richard King Mellon Foundation
S. D. Bechtel, Jr. Foundation
The Wallace Foundation
\$20K–\$49,999
The Annie E. Casey Foundation
The Grable Foundation
The James Irvine Foundation
Surdna Foundation
\$1K–\$19,999
Blue Shield of California Foundation
Charles Stewart Mott Foundation
The Eugene and Agnes E. Meyer Foundation

STATEMENTS OF FINANCIAL POSITION

DECEMBER 31, 2008 & 2007

	2008	2007
ASSETS		
Cash and cash equivalents	\$ 1,409,063	\$ 1,806,084
Contributions receivable	275,000	75,165
Membership dues receivable	6,050	–
Prepaid expenses	15,411	7,028
Deposits	14,886	4,775
Other assets	1,536	558
Property and equipment, net	285,289	37,221
Total assets	\$ 2,007,235	\$ 1,930,831
LIABILITIES AND NET ASSETS		
<i>Liabilities</i>		
Accounts payable and accrued expenses	\$ 52,854	\$ 158,063
Accrued leave	33,086	29,286
Deferred membership dues	40,975	59,300
Deferred rent	5,342	–
Deferred lease incentive	81,443	–
Deferred conference registration	–	155,600
Total liabilities	213,700	402,249
Net assets		
<i>Unrestricted</i>		
Undesignated	642,818	670,662
Board designated reserve	650,000	550,000
Total unrestricted	1,292,818	1,220,662
Temporarily restricted ¹	500,717	307,920
Total net assets	1,793,535	1,528,582
Total liabilities and net assets	\$ 2,007,235	\$ 1,930,831

¹ Includes temporarily restricted assets for program and operating support for 2009–2011

STATEMENTS OF ACTIVITIES

DECEMBER 31, 2008 & 2007

	2008	2007
REVENUE AND SUPPORT		
Grants and contributions	\$1,267,025	\$ 971,087
Membership fees	679,515	588,963
Conference sponsorship	82,500	157,000
Conference registrations	455,546	79,200
Action learning	77,400	–
Seminars	20,703	61,500
Consulting	17,289	6,618
Publications	3,846	3,910
Contributed services	2,070	9,024
Interest income	27,239	40,437
Other income	4,944	3,345
Total revenue and support	2,638,077	1,921,084
EXPENSES		
Program services:		
Member programs	981,643	659,669
Conferences	442,409	85,048
Research	126,455	304,667
Communications	262,509	216,313
Action learning	163,702	–
Total program services	1,976,718	1,265,697
Supporting services:		
Management and general	309,515	214,661
Fund-raising	86,891	75,970
Total supporting services	396,406	290,631
Total expenses	2,373,124	1,556,328
Changes in net assets	264,953	364,756
Net assets, beginning of year	1,528,582	1,163,826
Net assets, end of year	\$ 1,793,535	\$1,528,582

2008 National Conference Supporters

\$25K and above
The David and Lucile Packard Foundation
Evelyn & Walter Haas, Jr. Fund
The James Irvine Foundation
S.H. Cowell Foundation
\$10K–\$14,999
The Eugene and Agnes E. Meyer Foundation
Gordon and Betty Moore Foundation
S.D. Bechtel, Jr. Foundation
Silicon Valley Community Foundation
Stupski Foundation
Up to \$5K
Blue Shield of California Foundation
Draper Richards Foundation
Fleishhacker Foundation
REDF
Money Matters Conference Sponsors
\$25K AND ABOVE
Bank of America Foundation
\$5K–\$24,999
Social Venture Partners Seattle
Up to \$4,999
Altman Foundation
Rockefeller Philanthropy Advisors

Grantmakers for Effective Organizations 2008 Board of Directors

(as of 12/31/2008)

Beth Bruner, Chair
Bruner Foundation

Gregg Behr, Vice Chair
The Grable Foundation

Valerie Lies, Treasurer/Secretary
Donors Forum

Martha S. Campbell,
Governance Committee Chair
The James Irvine Foundation

.....

Roberto Cremonini
Barr Foundation

Cheryl L. Dorsey
Echoing Green

Irene M. Ibarra
The Colorado Trust

Handy L. Lindsey, Jr.
The Cameron Foundation

Clara Miller
Nonprofit Finance Fund

Grant Oliphant
The Pittsburgh Foundation

Edward Pauly
The Wallace Foundation

Gayle Williams
Mary Reynolds Babcock Foundation

GEO MEMBERS

*Members new to GEO in 2008
are highlighted in blue.*

Alberta Ecotrust Foundation
Alberta Real Estate Foundation
Allegany Franciscan Ministries, Inc.
The Aloha Foundation
American Society for the Prevention of
Cruelty to Animals
Amherst H. Wilder Foundation
The Annie E. Casey Foundation
[Arabella Legacy Fund](#)
Arcus Foundation
Arts & Science Council
ASB Community Trust
Assisi Foundation of Memphis
Associated Grant Makers
Association of Small Foundations
ASU Lodestar Center for Philanthropy
& Nonprofit Innovation
Atlanta Women's Foundation
The Atlantic Philanthropies
[The AVI CHAI Foundation](#)
Baltimore Community Foundation
[Bank of America Foundation](#)
Bank of America, Philanthropic
Management
[Baptist Community Ministries](#)
Barr Foundation
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
Brico Fund, LLC
Bruner Foundation
California Community Foundation
California Dental Association Foundation
The California Endowment
The California HealthCare Foundation
The California Wellness Foundation
The Cameron Foundation
The Champion Foundation
Carthy Foundation
The Case Foundation
Cedarmere Foundation

The Center for Effective Philanthropy
[The Centre for Sustainability](#)
[Charities Aid Foundation \(UK\)](#)
Charles and Helen Schwab Foundation
Charles and Lynn Schusterman
Family Foundation
Charles Stewart Mott Foundation
The Chasdrew Fund
Cherokee Preservation Foundation
Chesapeake Bay Trust
The Chicago Community Trust
City of Orlando, Florida
[Claneil Foundation](#)
Clarence E. Heller Charitable Foundation
The Cleveland Foundation
Cleveland Social Venture Partners
[The Clowes Fund, Inc.](#)
[CME Group Foundation](#)
The Coleman Foundation
The Colorado Health Foundation
The Colorado Trust
The Columbus Foundation
Common Good Ventures
[Commonweal Foundation Inc.](#)
Community Clinics Initiative
The Community Foundation for
Greater Atlanta
Community Foundation for
Monterey County
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](#)
The Community Foundation Serving
Riverside and San Bernardino Counties
Community Foundation Sonoma County
Community Memorial Foundation
[Con Alma Health Foundation](#)
Council of Michigan Foundations
Council on Foundations
[Craigslis Foundation](#)
The Cricket Island Foundation
Daisy Marquis Jones Foundation
The Daphne Foundation
The David and Lucile Packard Foundation

[DC Children & Youth Investment
Trust Corporation](#)
[de Beaumont Foundation](#)
Deaconess Community Foundation
Deaconess Foundation
[Dean & Margaret Leshner Foundation](#)
Delaware Valley Grantmakers
[The District of Columbia Bar Foundation](#)
Donors Forum
Donors Forum of Wisconsin
Doris Duke Charitable Foundation
The Dresher Foundation
The Duke Endowment
The Durfee Foundation
Dwight Stuart Youth Foundation
Dyson Foundation
Echoing Green
The Edna McConnell Clark Foundation
Education Matters
Edyth Bush Charitable Foundation, Inc.
Endowment for Health
Environmental Support Center
The Erie Community Foundation
[The Ettinger 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 Alliance
Fieldstone Foundation
[First 5 LA](#)
[First 5 Sonoma County](#)
[Flamboyan Foundation](#)
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 Global Fund for Children
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
Grants Management Associates
The Greater Cedar Rapids Community
Foundation
Greater Worcester Community Foundation
Greenlee Family Foundation
[Growth Philanthropy Network](#)
[Gulf Coast Community
Foundation of Venice](#)
Hallmark Corporate Foundation
Harold K.L. Castle Foundation
Hartford Foundation for Public Giving
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](#)
Icicle Fund
The Impact Foundation
International Center on Collaboration
International Development Research Centre
The Irene E. & George A. Davis Foundation
[Irene W. and C. B. Pennington Foundation](#)
The J.W. McConnell Family Foundation
The Jacob & Valeria Langeloth Foundation
Jacob and Hilda Blaustein 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](#)
Jim Joseph Foundation
The John R. Oishei Foundation
[John Rex Endowment](#)
John S. & James L. Knight Foundation
[John T. Vucurevich Foundation](#)
[JVA Consulting, LLC](#)
Kansas Health Foundation
The Kate B. Reynolds Charitable Trust
Kenneth A. Picerno Foundation
Kern Family Foundation
KnowledgeWorks Foundation

The Kresge Foundation
Kronkosky Charitable Foundation
Laidlaw Foundation
Lancaster County Community Foundation
Legacy Foundation, Inc.
The Leighty Foundation
[Linked Foundation](#)
The Lodestar Foundation
London Housing Foundation
Lotte & John Hecht Memorial Foundation
Lucile Packard Foundation for
Children's Health
Lumina Foundation for Education
The Lumpkin Family Foundation
[M. A. Toni Moreno](#)
Maine Community Foundation
Maine Health Access Foundation
Marguerite Casey Foundation
The Marion I. & Henry J. Knott Foundation
Mary Black Foundation
Mary Reynolds Babcock Foundation
[Massachusetts Cultural Council](#)
Mathile Family Foundation
Medina Foundation
MetroWest Community Health Care
Foundation
Meyer Memorial Trust
Milton A. & Charlotte R. Kramer
Charitable Foundation
Minnesota Council on Foundations
Moses Cone-Wesley Long Community
Health Foundation
Ms. Foundation for Women
The Muttart Foundation
National Arts Strategies
[National Center for Family Philanthropy](#)
Nebraska Children and Families Foundation
NeighborWorks America
Nellie Mae Education Foundation
New Hampshire Charitable Foundation
New Place Fund
New Profit, Inc.
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
Omidyar Network

OneStar Foundation
[Ontario Ministry of Citizenship and Immigration](#)
 Ontario Trillium Foundation
 Open Society Institute
 Oral Health Foundation
[The Oregon Community Foundation](#)
[Ottinger Foundation](#)
 Pact
 The Panasonic Foundation
[Panta Rhea Foundation](#)
 Partnership for Excellence in Jewish Education
 Partnership for Nonprofit Excellence
[Patrick Carney Foundation](#)
 The Paul G. Allen Family Foundation
 The Paul J. Aicher Foundation
 Peter and Elizabeth C. Tower Foundation
 The Pew Charitable Trusts
 Philadelphia Cultural Management Initiative
 The Philadelphia Foundation
[The Philanthropic Initiative](#)
[Philanthropy Awareness Initiative](#)
[Philanthropy New Zealand](#)
 Philanthropy Northwest
 The Pittsburgh Foundation
 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](#)
 Rockefeller Brothers Fund
 The Rockefeller Foundation
 Rockefeller Philanthropy Advisors
[Root Cause](#)
 Ruth Mott Foundation
 S.D. Bechtel, Jr. Foundation
 S.H. Cowell Foundation
 Saint Luke's Foundation of Cleveland, Ohio
[The Samberg Family Foundation](#)
 The San Diego Foundation
 San Diego Grantmakers
 San Francisco Foundation
 San Luis Obispo County Community Foundation
 Santa Barbara Foundation
 Saxon Family Fund
 The Schimel Lode
[Sea Change Foundation](#)
[The Seattle Foundation](#)
 Sheryl Johns
 Siebert Lutheran Foundation
 Sierra Health Foundation
 Silicon Valley Community 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 Partners Fund
 The Staten Island Foundation
 Stella and Charles Guttman Foundation
 Stupski Foundation
 The Sudbury Foundation
 The Summit Foundation
 Sunflower Foundation
 Surdna Foundation
[Sustainability Institute](#)
 Taproot Foundation
 Telstra Foundation
 Texas High School Project
 Third Sector New England
 Tides Foundation
[Toledo Community Foundation](#)
[TomKat Charitable Trust](#)
[The Tony R. Wells Foundation, Inc.](#)
 UJA-Federation of New York
 United Methodist Health Ministry Fund
[United Way of the Bay Area](#)
 United Way of Cambridge and North Dumfries
[United Way of Canada - Centraide Canada](#)
[United Way of Greater Houston](#)
 United Way of Greater Toronto
 United Way of Winnipeg
 Unity Foundation
[Venture Philanthropy Partners](#)
 Virginia Tobacco Settlement Foundation
 The W. Clement & Jessie V. Stone Foundation
 W. K. Kellogg Foundation

Wachovia Regional Foundation
 The Wallace Alexander Gerbode Foundation
 The Wallace Foundation
 Walter and Elise Haas Fund
[Weingart Foundation](#)
 The Whitman Institute
 Wilburforce Foundation
 The William and Flora Hewlett Foundation
 The William Bingham Foundation
 William Caspar Graustein Memorial Fund
 William Penn Foundation
 Williamsburg Community Health Foundation
[The Women's Foundation of California](#)
 Woods Charitable Fund
 Woods Fund of Chicago
[Y & H Soda Foundation](#)
 Z. Smith Reynolds Foundation
 ZeroDivide



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.

vision

GEO envisions 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.

assumptions and 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 and
 - 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.