



2017 ANNUAL REPORT

# Community Makes The Difference

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## Message From the President & Board Chair

**Community makes the difference. You make our community. Thank you.**

“If we want to go far, go together.” That’s been a GEO community core value since we first came together in 1998. And it’s never been truer or more relevant to our success as grantmakers than it is today.

2017 was a year of unprecedented uncertainty for all of us in our community. We saw harmful policies multiply. We saw inequalities in a more pronounced light. We encountered new obstacles as we embarked on more complex, cultural changes to grantmaking practice.

But together, our community of grantmakers stepped up and worked to answer the call to action sounded by our nonprofit and community partners. We created more opportunities to make the toughest practice changes easier. We created more spaces and places for grantmakers to solve problems together. We answered real-time improvement questions with ready-to-use tools. And we designed more small group experiences to help grantmakers take near-term action in shaping the operational and cultural conditions for long-term change.

We also took the opportunity in 2017 to listen, learn, and re-evaluate our way forward, answering critical questions including:

- Where are grantmakers getting stuck in their journey toward improvement?
- What do nonprofits need to grow stronger that they aren’t getting from grantmakers now?
- How can the GEO community add the most value?

The answers helped us create a future roadmap in our 2018-2021 strategy, which focuses on deepening the power of our community to achieve deeper results.

As we all know, becoming a smarter grantmaker is not an individual effort. We can get there only by learning from one another, listening to the perspectives inside and outside our institutions, and creating and implementing solutions *with* the nonprofits that are changing lives in our communities. That is the most important work that lies ahead.

Thank you for making 2017 another year of meaningful progress together. Join us in 2018 as we mobilize our grantmaking community like never before, raise our voices with confidence, and move past obstacles to creating more equitable, supportive communities.



**LaTida Smith**

*Board Chair, GEO  
President and CEO,  
Moses Taylor Foundation*



**Kathleen Enright**

*President, CEO, GEO*



## Leading the Way Toward Practice Change

**The power of our community is undeniable when we look at the confidence we found and the change we accomplished while working together in 2017.**

**72%** of GEO members reported engaging in four key practices to smarter grantmaking - general operating support, multiyear grants, evaluation, and capacity-building support. That's 21 percentage points higher than the field's adoption rate.

GEO's 2017 Field Survey

**71%** of GEO members reported implementing a grantmaking focus on diversity, equity and inclusion. Just 41% of non-members have done the same. A strong majority of members have also implemented staff diversity policies, embedded diversity, equity, and inclusion in their vision/mission statements, and completed diversity trainings within their organizations.

GEO's 2017 Field Survey

## Removing Obstacles to Progress

**With your support, we made changing practice easier by removing more of the obstacles standing in the way.**

***More ways to connect with peers and solve problems.***

Tighter connections enable grantmakers to solve more problems. That's why we made those connections easier to access in 2017. From our deep dive workshops to regional partnerships to webinars to learning networks to conferences, more grantmakers found new ideas from peers seeking to improve their practice, and the courage to stay the course in the face of obstacles.

537

individuals gained empowering new skills from GEO's Learning and Leading Change conferences. Combined, these conferences offered 27 breakout sessions, 6 short talks, 4 plenaries, 3 site visits, 3 home team meetups, 2 workshops and 1 "Fail Fest" featuring the lessons learned from taking risks.

[Learn about GEO's upcoming conferences.](#)

300+

individual grantmakers forged stronger local bonds by taking part in GEO's regional partnerships in California and North Carolina, ultimately helping these grantmakers hold themselves accountable to one another and make more change possible.

90

members exchanged ideas and best practices in one of GEO's peer learning networks. With opportunities to connect virtually and in-person throughout the year, these networks helped individuals move past obstacles and accelerate the pace of change in specific areas —like learning, capacity building and systems grantmaking — within their organizations.

[Learn more about peer networks you can join now.](#)

454

participants took part in GEO webinars, learning new models for investing in the nonprofit workforce and supporting nonprofit learning and evaluation capacity, among other practice ideas.

***Just-in-time responses to burning questions about how to improve.***

When grantmakers are in the midst of changing practice, new questions pop up continuously on the journey, like "How can I make change without alienating others in my organization?" or "How can a microculture in my organization help or undermine my success, and what can I do about it?" or "What are my peers doing when it comes to diversity, equity, and inclusion?"

We heard the feedback and responded in 2017 with more resources to fill the gaps, spark new ideas, and help grantmakers feel less alone in the messy middle of making big changes within their organizations. And we made those resources easier to access.





**52,828**

people visited our newly designed website, which launched in April 2017 and offered easier ways to search and sort relevant resources on a specific improvement topic.

[Explore our latest resources.](#)

**10,000+**

publications were downloaded. That included [Exploring Microcultures and Why They Matter](#), [Making Meaningful Change](#), and [Trustees as Partners in Learning and Evaluation](#).

**91**

organizations found answers to their practice change questions using GEOList, our community's curated member listserv where members share their insights and help each other overcome obstacles to change.

[Crowdsource an answer to your question now.](#)

**2,000 +**

individuals attended one of GEO's 50 [speaking engagements](#) across the country, discovering new ways to think differently about practice change and start internal conversations about flexible, reliable funding, collaboration, culture, learning and evaluation, capacity building and strengthening relationships.

***Support in creating the conditions for lasting change.***

Even when the steps to adopting a smarter grantmaking practice are clear, and tapping into supportive peers is easy, an obstacle still remains: how to make it last within your organization. The GEO community responded to this need by designing experiences that allowed grantmakers to create the supportive cultures and strong nonprofit relationships that help positive changes stick.

**“** Because of the kind of support you've given us, we feel that even as small grantmakers we can make a difference in different parts of the state. Thank you for pointing us in the right direction. It just makes me feel like we can do it, that we're all part of a big team.”

R. Mimi Iijima, Director of Programs and Special Projects, Pennsylvania Humanities Council



**278** grantmakers participated in one or more of the GEO community's workshops on culture, capacity building, or inclusive grantmaking, which allowed them to explore these topics in meaningful detail and identify the implications for their organization's context.

[Learn more about upcoming workshops.](#)

**33** individual grantmakers took part in two cohorts of GEO's Change Leaders in Philanthropy Fellowship, where they found guidance from a small cohort of peers, learned new skills, and shared insights in real-time to improve the conditions for nonprofit success over a 10-month period. 100% of our first cohort of fellows made meaningful process on a specific plan for implementing change in their organization.

**83%** of CEOs walked away from GEO's convening on the role of culture in leading change feeling confident that they would make a change in their work to help smarter grantmaking practices take root in their organizations.

**“**I think this program really brought home to me that leadership is learned. It's a practice. It's about developing skills and managing change. The program really was focused on how to lead from where you're sitting.”

Fatima Angeles,  
Vice President of Programs,  
California Wellness Foundation

## Preparing For The Journey Ahead

**In 2017, we also responded to new questions within philanthropy and gathered your input on what matters to our future as grantmakers.**

2017 marked a year of uncertainty and new questions for all of us. At the same time, it motivated recognition that our GEO community was larger, more diverse, and more ready than ever to lead the way toward positive change.





## Learn more about our community.

**In 2017, the GEO community grew to include 598 organizations, representing almost 7,000 individual grantmakers. Search our membership directory to find fellow improvers in your community.**

To answer the question of how the GEO community could add the most value in the future, we engaged almost 300 grantmakers and 75 nonprofits in a year-long, iterative feedback process. Combined with findings from our 2017 study of fieldwide practice ([Is Grantmaking Getting Smarter?](#)), this is what we learned:

- **Embracing equity on a structural level is critical, but challenging.** Nonprofits told us it's time to raise up the voices of the marginalized—in our work and our workplaces. Many grantmakers agree that diversity, equity and inclusion are essential or central to their mission. But only a small portion have been able to put equity into practice in their organizations.
- **Stronger, longer forms of support are needed.** To grow into resilient, healthy organizations, nonprofits need more long-term capacity building and general operating support from grantmakers. Similarly, grantmakers voiced a need for stronger support from peers and support organizations in creating the cultures and structures that maximize effectiveness.
- **Collaborating more closely is a must.** To make faster progress, grantmakers and nonprofits alike see a need to listen more closely to one another, to share expertise more often, and work together as true strategy partners.



In October 2017, GEO's Nonprofit Advisory Council issued We Are In This Together, a letter urging grantmakers to push the boundaries of what it means to partner to support grantees in more meaningful ways.

## Now Is The Time To Go Deeper

**By deepening the power of the GEO community, we can enable the deeper level of change grantmakers and nonprofits want to see.**

Over the next four years, GEO will invest in a strategy that will deepen our community's commitments, deepen our collective capability, and deepen our ability to strengthen nonprofits and make lasting progress in the communities in which we all work.

### **What grantmakers can expect:**

- More programs designed to reflect member priorities as well as our latest insights on the practices that best support nonprofits and communities. These include implementing a learning mindset and the practices that follow; positioning racial equity as an imperative for grantmaker effectiveness; sharing power with and including nonprofits and community members.
- An expanded toolkit that integrates equity throughout smarter grantmaking practices.
- More ways to build strong bonds with peers and access real-time assistance.

“

**There may well be greater certainty than we think when we really listen to one another and gain from our collective expertise.”**

[Learn more about GEO's 2018-2021 Strategy](#)



## 2017 Committees and Advisors

### Learning Conference 2017 Planning Committee

- Meghan Barp (Chair), Formerly of Greater Twin Cities United Way
- Allison Barmann, Bush Foundation
- Cheryl Chang, Sunlight Giving
- Nancy Csuti, The Colorado Trust
- Jon Goldberg, Surdna Foundation
- Luz Gomez, John S. and James L. Knight Foundation
- Kim Ammann Howard, The James Irvine Foundation
- Dahnesh Medora, Meyer Memorial Trust
- Dawn Melchiorre, Forefront
- Destiny-Simone Ramjohn, Kaiser Permanente
- Liz Sak, The Cricket Island Foundation
- Maurice Samuels, Jxohn D. and Catherine T. MacArthur Foundation
- Donata Secondo, Democracy Fund
- Rick Ybarra, Hogg Foundation for Mental Health

### Learning Conference 2017 Host Committee

- Greg DiDomenico (Chair), Community Memorial Foundation
- Heather Higgins Alderman, Illinois Children's Healthcare Foundation
- Gillian Darlow, Polk Bros. Foundation
- Nancy Fishman, Grand Victoria Foundation
- Michael Hennessy, The Coleman Foundation, Inc.
- Mae Hong, Rockefeller Philanthropy Advisors
- Grace Hou, Woods Fund Chicago
- Peter Mich, McDougal Family Foundation
- Paul Miles, Wheat Ridge Ministries
- Cindy Moelis, The Pritzker Traubert Family Foundation
- Mary O'Donnell, The Retirement Research Foundation
- Marianne Philbin, Pierce Family Foundation
- Unmi Song, Lloyd A. Fry Foundation
- Beth Swanson, The Joyce Foundation
- Jeff Ubois, John D. and Catherine T. MacArthur Foundation
- Christy Uchida, The Brinson Foundation
- Eric Weinheimer, Forefront

## Leading Change Conference 2017 Planning Committee

- Philip Li, Robert Sterling Clark Foundation (co-chair)
- Brenda Solorzano, Headwaters Health Foundation of Western Montana (co-chair)
- John Brothers, T. Rowe Price Foundation
- Annie Hernandez, Formerly of Frieda C. Fox Foundation
- Pia Infante, The Whitman Institute
- Sindhu Knotz, The Giving Practice
- Barbara Leonard, Maine Health Access Foundation
- Jenny Nielsen, Grantmakers of Western Pennsylvania
- Anita Patel, Bush Foundation
- Elissa Perry, Management Assistance Group
- Candy Solovjovs, Meyer Memorial Trust
- Amanda Standerfer, The Lumpkin Family Foundation

## Nonprofit Advisory Council

- Sarita Gupta, Jobs with Justice
- Kierra Johnson, Formerly of URGE | Unite for Reproductive & Gender Equity
- Christina Livingston, ACCE Institute
- Steven McCullough, Communities in Schools
- Donna Murray-Brown, Michigan Nonprofit Association
- Rob Riley, Northern Forest Center
- Johng Ho Song, Koreatown Youth and Community Center
- Cathy Tisdale, Camp Fire
- Arturo Vargas, National Association of Latino Elected and Appointed Officials
- Wes Ware, formerly of BreakOUT!
- Melinda Wiggins, Student Action with Farmworkers
- Kate Williams, 1% For The Planet
- Mary Zanotti, Colorado Youth for a Change

## Equity Advisory Group

- Starsky Wilson (Chair), Deaconess Foundation
- Sheri Brady, The Aspen Institute
- Arelis Diaz, W.K. Kellogg Foundation
- Raquel Guitierrez, Vitalyst Health Foundation
- Damon Hewitt, Open Society Foundations
- Jennifer Splansky Juster, Collective Impact Forum
- Lulete Mola, Greater Twin Cities United Way
- Candy Solovjovs, Meyer Memorial Trust
- Denise St. Omer, Greater Kansas City Community Foundation
- Deborah Aubert Thomas, Philanthropy Ohio
- Leslie Wright, Greater Twin Cities United Way



## 2017 Supporters

### Unrestricted and Program Support:

- The Annie E. Casey Foundation
- Barr Foundation
- Bill & Melinda Gates Foundation
- Blue Shield of California Foundation
- The California Wellness Foundation
- Charles Stewart Mott Foundation
- Conrad N. Hilton Foundation
- The David and Lucile Packard Foundation
- Evelyn & Walter Haas, Jr. Fund
- Ford Foundation
- Fund for Shared Insight
- The Heinz Endowments
- John D. and Catherine T. MacArthur Foundation
- JPMorgan Chase & Co.
- Kaiser Permanente
- The Kresge Foundation
- Lumina Foundation
- Robert Sterling Clark Foundation
- Robert Wood Johnson Foundation
- Rockefeller Brothers Fund
- S.D. Bechtel, Jr. Foundation
- Surdna Foundation
- Weingart Foundation
- The William and Flora Hewlett Foundation
- W.K. Kellogg Foundation

### Leadership Circle Support:

- The Bainum Family Foundation
- Baptist Community Ministries
- Bigglesworth Family Foundation
- Blandin Foundation
- BlueCross and BlueShield of North Carolina Foundation
- Blue Cross Blue Shield of Massachusetts Foundation, Inc.
- The Brinson Foundation
- Bush Foundation
- California HealthCare Foundation
- Champion Advocacy Fund
- Charles and Lynn Schusterman Family Foundation
- The Colorado Health Foundation
- The Columbus Foundation
- Community Foundation of South Jersey

- The Cricket Island Foundation
- Deaconess Foundation
- The Durfee Foundation
- The Eugene and Agnes E. Meyer Foundation
- Fairfield County's Community Foundation Inc.
- The Florida Bar Foundation
- Frieda C. Fox Family Foundation
- The Grable Foundation
- Greater Houston Community Foundation
- Greater Twin Cities United Way
- Hawai'i Community Foundation
- Healthcare Georgia Foundation
- Health Foundation for Western and Central New York
- Henry P. Kendall Foundation
- Houston Endowment Inc.
- John S. and James L. Knight Foundation
- John Rex Endowment
- JPMorgan Chase & Co.
- Lancaster County Community Foundation
- Liberty Hill Foundation
- Maine Health Access Foundation
- Margaret A. Cargill Philanthropies
- Mary Reynolds Babcock Foundation
- Moses Taylor Foundation
- Nellie Mae Education Foundation
- The Oak Foundation
- Ontario Trillium Foundation
- The Priddy Foundation
- Robins Foundation
- Rockefeller Philanthropy Advisors
- Ruth Mott Foundation
- Saint Luke's Foundation of Cleveland, Ohio
- The Sheltering Arms Foundation
- Stupski Foundation
- Support Center for Nonprofit Management | Partnership in Philanthropy
- Tarsadia Foundation
- William Caspar Graustein Memorial Fund

## Financials

### **GEO's financial position and activities**

(Please see following)

**Grantmakers for Effective Organizations**  
**Statements of Activities**  
**Years ended December 31, 2017 and 2016**

	<b>2017</b>	<b>2016</b>
<b>Revenue and Support</b>		
Member contributions	\$ 1,935,478	\$ 1,869,390
Grants and contributions <sup>2</sup>	1,446,851	2,166,166
Conference sponsorship	955,730	233,500
Conference registration	398,211	665,041
Consulting	2,500	24,536
Investment Income	8,517	15,179
Peer Learning	128,000	132,380
Publications		
Other income	223	59
<b>Total revenue and support</b>	<u>\$ 4,875,510</u>	<u>\$ 5,106,251</u>
<b>Expenses</b>		
Program services:		
Conferences	831,943	787,077
Communications	569,290	827,767
Member programs	1,274,858	1,266,487
Evaluation and Learning	842,154	144,117
<b>Total program services</b>	<u>3,518,245</u>	<u>3,025,448</u>
Supporting services:		
Management and general	1,505,357	1,264,522
Fundraising	286,387	305,219
<b>Total supporting services</b>	<u>1,791,744</u>	<u>1,569,741</u>
<b>Total expenses</b>	<u>5,309,989</u>	<u>4,595,189</u>
Change in Net Assets	(434,479)	511,062
Net Assets, beginning of year	<u>5,514,236</u>	<u>5,003,201</u>
Net Assets, end of year	<u>\$ 5,079,784</u>	<u>\$ 5,514,263</u>

<sup>2</sup> Includes temporarily restricted grants and contributions for multiyear general operating and program support that are recognized in the year they are raised though allocated for activities in future years

**Grantmakers for Effective Organizations**  
**Statements of Financial Position**  
**December 31, 2017 and 2016**

	<b>2017</b>	<b>2016</b>
<i>Assets</i>		
Cash and cash equivalents	\$ 2,992,154	\$ 3,138,304
Contributions receivable	527,546	923,860
Other receivables	2,620	2,536
Investments <sup>1</sup>	1,405,602	1,397,086
Prepaid expenses	79,221	43,056
Deposits	37,736	22,961
Property and equipment, net	<u>223,529</u>	<u>209,986</u>
<b>Total assets</b>	<b><u>\$ 5,268,408</u></b>	<b><u>\$ 5,737,789</u></b>
<i>Liabilities and Net Assets</i>		
<b><i>Liabilities</i></b>		
Accounts payable and accrued expenses	\$ 45,338	\$ 37,542
Accrued leave	66,987	62,278
Deferred Revenue	-	13,000
Capital Lease Payable	23,923	-
Deferred rent	<u>52,376</u>	<u>110,706</u>
Total liabilities	<u>188,624</u>	<u>223,526</u>
<b><i>Net Assets</i></b>		
Unrestricted		
Undesignated	1,917,843	2,597,437
Board designated	<u>1,475,000</u>	<u>1,400,000</u>
Total unrestricted	3,392,843	3,997,437
Temporarily restricted	<u>1,686,941</u>	<u>1,516,826</u>
<b>Total net assets</b>	<b><u>5,079,784</u></b>	<b><u>5,514,263</u></b>
<b>Total liabilities and net assets</b>	<b><u>\$ 5,268,408</u></b>	<b><u>\$ 5,737,789</u></b>

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<sup>1</sup> Investments were in government-backed securities

