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NATIONAL CONFERENCE REPORT



GRANTMAKERS
for EFFECTIVE
ORGANIZATIONS

Held in Partnership
with

Forum of Regional
Associations of
Grantmakers



Grantmakers for Effective Organizations is a community of grantmakers dedicated to building strong and effective organizations. GEO's mission is to maximize philanthropy's impact by advancing the effectiveness of grantmakers and their grantees. Through research, conferences, its Web site, publications and other activities, GEO highlights knowledge and practices in the field that advance the organizational effectiveness movement. More information about GEO and a host of resources and links for funders is available at www.geofunders.org.



The Forum of Regional Associations of Grantmakers is a national network of regional associations serving philanthropy. The forum's 28 regional associations cover the country and, in their city, state or multistate regions, serve and lead more than 4,000 foundations, corporations, organizations and individuals. The purposes of the forum and its network are to engage more people and organizations in philanthropy, strengthen the effectiveness of those already engaged and provide information about regional giving. The forum's mission is to promote philanthropy by inspiring and enhancing the leadership and capacity of regional associations and their members in promoting the public good. For more information, visit www.givingforum.org.

GEO's 2004 National Conference in Seattle attracted roughly 500 grantmakers for a series of lively, informative and often-inspiring discussions of one of the key challenges confronting the philanthropic community today: the challenge of alignment.

Why alignment? Because the converging pressures of economic turbulence, new government regulations, increased public scrutiny and ever-growing societal needs have shown us that maintaining the status quo in philanthropy is no longer enough.

It is time to do a better job aligning our mission, our goals and everything we do, from evaluation and grantee relations to communications and advocacy.

In this report on the Seattle conference, we address some of the most pressing questions grantmakers face today, including:

- How can grantmakers add value to their work and exert leadership on critical issues confronting communities?
- How can we create positive relationships with the media and communicate favorable messages to our communities about the work of grantmakers and their nonprofit partners?
- How can we strengthen our relationships with grantees and build a better partnership based on mutual respect and a shared commitment to results?
- How can we make high-quality evaluation an accepted and supported part of grantmakers' day-to-day work?
- How can grantmakers work together more effectively on common interests and concerns?

In addition to offering answers to these questions, this report celebrates the great accomplishments of grantmaking organizations in understanding and applying what it takes to make alignment work. It also highlights the latest research on issues from funder networks to the effectiveness practices of foundations.

This report serves as an effort to reach beyond the attendees at the GEO conference to the broader community of individuals and organizations that are engaged in improving grantmaker and grantee effectiveness.

We appreciate your interest in this vitally important topic for the future of philanthropy, and we welcome your comments and involvement.



Janine E. Lee
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LOOKING INWARD

Issues in Operational Alignment for Grantmakers

Merriam-Webster defines *alignment* as “the proper positioning or state of adjustment of parts in relation to each other.” For grantmakers, it is about remaining true to the organization’s mission, ensuring that staff and board can deliver effectively on that mission and aligning the organization’s self-image with the image that others see.

In short, alignment touches on virtually every aspect of how a grantmaking organization does its work. In the following articles, we look at how the alignment issue comes into play in areas from foundation leadership and planning to communications.

Foundation Leadership: Magnifying the Value of Your Grantmaking

For most grantmakers, leadership means “telling grantees what to do,” according to Mark Kramer, founder and managing director of the Foundation Strategy Group and chairman of the Center for Effective Philanthropy.

Aligning a foundation’s grantmaking activities with its goals for social change, however, requires a broader understanding of leadership, Kramer said. It requires grantmakers to look beyond their relationships with their grantees and to consider other ways to make a difference.

“You cannot exert leadership if you are in the business of responsive grantmaking. You need to be more proactive,” Kramer said.

Foundations can create value in four ways, according to Kramer. They can

1. **Select the best grantee** and direct resources to their most productive use;
2. **Signal other funders** and attract additional sources of funding for worthy causes and organizations;
3. **Improve the performance of**



Phyllis Campbell, president/CEO, The Seattle Foundation

grant recipients and therefore increase the return on foundation investments; and

4. **Advance the state of knowledge and practice** about social problems — through communications, research and investments in promising strategies.

Grantmakers need to exert increasing amounts of leadership as they move down this list. The payoff, according to Kramer, will be increased impact on the issues that are the focus of the grantmaker's work.

Stepping up to the leadership challenge means moving from a technical approach to an adaptive approach to problem solving. Citing



the work of Ronald Heifetz and his book, *Leadership Without Easy Answers*, Kramer said that technical problems have well-defined answers. For example, if a child's family does not have the resources to send him or her to college, a foundation or government entity can provide a scholarship. Problem solved.

By contrast, adaptive problems, such as broader reform of K-12 education, are complex; the answers are not easily or widely known. "Solving adaptive problems means creating systemic change, advancing knowledge and practice within the field—and managing the conditions that enable people to figure out the solution for themselves,"

Kramer said.

One key to adaptive leadership, he added, is to allow distress to develop and continue — an uncomfortable prospect for grantmakers who are intent on solving problems on the spot. "If you want people to change their behavior, there has to be some source of distress that makes it imperative that they change what they are doing in order to solve the problem," Kramer said.

Kramer cited the example of a group of Pittsburgh foundations that withdrew funding from the public schools in 2002 because of a lack of confidence in their leadership. The foundations' action served as a visible signal that the school district needed to



change its ways. Within two years, a mayorally appointed commission had called for a range of dramatic changes that school officials were pursuing.

"This was an interesting act of foundation leadership, and it was less about the money than the fact that these foundations helped to frame a problem facing the city," Kramer said.

Communications: Beyond the One-Day News Story

Foundation staff and leaders often complain that the news media are missing the "real stories" about philanthropy. The critique is as follows: In their eagerness to expose corruption, mismanagement and conflicts of

TOOLS FOR DEVELOPING YOUR THEORY OF CHANGE

In recent years, increasing numbers of foundations and their nonprofit grantees have developed theories of change — concise statements about how their work will lead to specific outcomes that the organizations seek. A theory of change, or "logic model," can provide a sound and thoughtful basis for planning, evaluation and other activities.

"A theory of change can be based on a hunch, a hypothesis or empirical evidence," explained Susan Bell, vice president of the William and Flora Hewlett Foundation. "The key is to be explicit about the organization's assumptions and the necessary pre-conditions for change."

But how does an organization go about conceiving its theory of change? Several organizations are developing tools to help. A tool from the International Network on Strategic Philanthropy — available at www.insp.efc.be and in GEO's online content database — allows users to create a framework to map how a program or initiative can be structured to move from present conditions to a vision of success. Similar tools are in development by the Innovation Network (www.innonet.org) and The Theory of Change Web site (www.theoryofchange.org).

Word for Word: Defining Strategic Communications

“Strategic communications means knowing what your message is, whom you are delivering it to and how. Foundations need to think about building their own capacity for strategic communications, as well as the capacity of their grantees, through training, technical assistance and other activities.”

— Amber Kahn, executive director, The Communications Network

interest, reporters and editors largely ignore all the wonderful work that nonprofit organizations and their funders are doing every day to solve serious problems facing our society and the world.

It is a critique that rings hollow, however, for many journalists — and also for increasing numbers of grantmakers who are taking it upon themselves to improve their communications and their relationships with the press.

“Most of the fault for the lack of information in the press about foundations lies with foundations and not the press,” said Grant Oliphant, associate director of The Heinz Endowments.

Oliphant and others cited a lack of transparency among grantmakers as the number-one reason why they are so often on the receiving end of tough scrutiny from the press. When The Heinz Endowments recently was accused of secretly using its funding of the Tides Center of Western Pennsylvania to advance a laundry list of partisan causes and fringe political groups, the grantmaker responded openly and aggressively.

Using its Web site, the foundation published a complete listing of all of its grants to the Tides Center, along with detailed responses to accusations made in a number of newspaper columns and editorials. For good measure, the foundation also provided links to the

offending articles themselves.

One gauge of the success of the endowments’ communications effort, according to Oliphant, was that the story remained on the opinion pages and was never picked up by news reporters. “There just was not any validity to the claims,” Oliphant said. “And the reporters we deal with on a

“In foundations where communications is done well, the agenda is not driven by the individual aspirations of each and every grantee and program officer for press. It is driven by the need for the foundation to get its message out to the community.”

— Grant Oliphant, associate director, The Heinz Endowments

regular basis understood this, because we have always been aggressive in getting information out about all aspects of what we do.”

If a lack of transparency is one problem plaguing grantmaker relations with the press, another is unrealistic expectations. Often, grantmakers and their grantees will feel strongly that what they are doing merits front-page coverage. More often than not, however, they are wrong.

Instead of seeking one-day news stories, grantmakers should work to build a long-lasting relationship with the press so that the truly big stories

will be covered in full — and the grantmaker will be looked to as a source of expert perspective on issues as they arise.

“In foundations where communications is done well, the agenda is not driven by the individual aspirations of each and every grantee and program officer for press. It is driven by the need for the foundation to get its message out to the community,” Oliphant said.

Grantmakers should also remember that the press is not the only way to spread the word about what you are doing, added Kathy Bushkin, executive vice president and chief operating officer of the United Nations Foundation.

“The media is important, but it cannot be the only way we communicate about who we are,” she said. “We need to figure out other ways to get the

word out about what we are doing to the communities we serve.”

Those “other ways” include Web sites, annual reports and regular communications with grantees, lawmakers and other key audiences. By creating a consistent message in these and other communications, grantmakers can succeed in telling their story — even if they don’t make it onto the front page or the evening news.

“What we are after in this work is not the one-day news story anyway,” said John Bare, director of planning and evaluation with the John S. and James L. Knight Foundation. “We need to align ourselves with serving the social good,

and that requires a lot of hard thinking about how to communicate effectively with key audiences over time.”

Internal Alignment: The Role of the Program Officer

According to William P. Ryan, grantmakers generally address human resource issues by seeking “effective alignment.” This means asking whether the right people in their organizations have responsibility for the right things.

By rephrasing the question to ask whether the right people have the *right amount of responsibility* for the right things, Ryan said grantmakers shift the focus from effective alignment to “the alignment of effectiveness.”

As a research fellow at the Hauser Center for Nonprofit Organizations at Harvard University, Ryan recently conducted a survey of program officers and grantees at 20 foundations. The goal of the survey was to find out what the interviewees viewed as “good grantmaking” — i.e., to solicit their personal theories about what makes some grants more effective than others.

The researchers interviewed program officers and grantees about three grants: one reference grant chosen by the researchers, one “better” grant chosen by the interviewees, and one grant they deemed as “worse.” For the program officers, what the better grants had in common was an opportunity to help shape grantee programs and proposals. Better grants also tended to be those in which the program officer played a role in implementation — for example, by helping grantees work through problems.

The worse grants, by contrast, generally were those in which the program officer did not have an opportunity to shape the work at hand. Either the grantee was indifferent to the foundation’s advice and expertise, or decisions were imposed on the program officer by the foundation’s trustees and senior executives.

EFFECTIVENESS PRACTICES OF FOUNDATIONS

With the pressure for performance and accountability in the nonprofit sector growing exponentially in recent years, a new research study sheds light on how grantmakers think about and try to improve their effectiveness.

The first-ever study of the effectiveness practices of foundations was conducted for GEO and the David and Lucile Packard Foundation by the Urban Institute. It included a national survey of foundations, interviews with foundation staff and leaders and case studies.

Among the study’s key findings was a marked difference in the effectiveness practices of community foundations compared to those of independent and corporate foundations. For example:

- Independent and corporate foundations were far more likely than community foundations to rate establishing focused and limited grantmaking areas as very important to achieving effectiveness. By contrast, the majority of community foundations said that maintaining a broad grants program is very important to effectiveness.
- Corporate and independent foundations were notably more likely than community foundations to have made grants of three years or longer during the preceding two years.
- Community foundations typically were more likely than their peers to have engaged in various self-evaluation activities during the preceding two years (e.g., conducting a strategic planning process or soliciting grantee feedback). However, corporate and independent foundations were more likely than community foundations to have reviewed grants for consistency with stated foundation priorities.
- Community foundations also were more likely than others to have engaged in various communications activities during the preceding two years (e.g., publishing annual reports and newsletters and actively soliciting press coverage).

“Clearly, the major factor in these differences is the lack of incentives for corporate and independent foundations,” said GEO Executive Director Kathleen Enright. “Community foundations have a clear interest in recruiting donors and, therefore, making every effort to prove their effectiveness.”

For more on the study, see www.geofunders.org.

Ryan said he was surprised to see that nonprofits also tended to place the highest value on those grants in which the program officer was involved in developing a program and aiding in its implementation. Of course, many nonprofits lamented instances in which program officers were viewed as *too* involved — either an intruding or an imposing force. But program officer meddling was less of a factor in worse grants than intrusive grantmaker policies, such as overly restrictive guidelines for reporting.

The bottom line, according to Ryan, is that grantmakers need to pay closer attention to issues of autonomy for program officers and other staff.

“Alignment demands that we create institutional impact, and that means keeping people relatively in line,” Ryan said. “At the same time, we need to give people the latitude to do their work — and to enjoy it.”

The prevailing focus on organizational effectiveness in the philanthropic and nonprofit worlds, Ryan concluded, should not be viewed as an excuse for exerting more control over people. Rather, with his research showing that program officers are more effective when they maintain a degree of influence over their work, Ryan said grantmakers may need to think of alignment in a different way.

Organizational Realignment: Changing Course

When Steven A. Schroeder took over as CEO of The Robert Wood Johnson Foundation, his board was looking for ways to have more of an impact on the health issues that have always been the focus of the foundation’s grantmaking. Schroeder suggested branching out into substance abuse prevention, an area for which he viewed existing efforts, primarily funded by the government, as ineffective.

“I laid out a vision for working on

these issues and, frankly, didn’t get a lot of support from the staff,” Schroeder said. Foundation employees, he explained, were working on other issues and were therefore reluctant to see a significant change.

When the issue went before the full board, the vote on Schroeder’s plan — which would have created three focus areas for the foundation: access to health care, quality of care and substance abuse — was 8-8. In an effort to break the tie, one board member suggested that the foundation limit the focus of its substance abuse work to underage smoking. When the votes were counted again, the revised proposal was approved.

Word for Word: Grantmakers as Advocates

“One of the most important trends in the United States today is the devolution of power to the states. This makes philanthropy relevant in terms of its ability to advocate and educate and build coalitions around issues from education to the shrinking social safety net. Foundations and their grantees are working at the community level to solve problems and deliver services. We need to rediscover our public voice and show the way to solutions.”

— Edward Skloot, executive director, Surdna Foundation

“Over time, the board became educated on the issue, we brought in new staff, and we were complimented for our bravery in taking this issue on,” said Schroeder. “But it certainly wasn’t a slam dunk.”

Schroeder’s advice to other grantmakers seeking to realign their priorities is to make every effort to remain faithful to the mission — in Robert Wood Johnson’s case, “to improve the health and health care of all Americans.” Schroeder also noted the importance of having good data and assessing the staff’s expertise to take on new issues.

“It is hard to get people who are

used to certain things to change,” he said. “It’s often easier to go in a new direction with staff who are green.”

For James E. Canales, president and chief executive officer of The James Irvine Foundation, realignment had less to do with broader organizational priorities than with the nitty-gritty of foundation operations. Canales’ assumption of the CEO job in 2003 came after a difficult period for the foundation marked by declining assets, staff layoffs and unflattering press coverage of foundation spending.

Canales’ prescription: an “alignment work plan” that looked across the foundation’s operations and made changes in accordance with the

foundation’s new strategic plan. These changes included the articulation of a core set of grantmaking principles; a team orientation for the staff with clearer lines of accountability; changes in grantmaking procedures, including the division of grants between those requiring intensive staff involvement and those that did not; and changes in the structure of board meetings, as well as other aspects of board governance.

“We thought it was important to look at every aspect of how we functioned as a foundation and how we could effectively advance our objectives in light of the realities of the time,” he said.



Planning: Is There an Alternative to Formal Planning?

Planning in its various forms is essential to everything grantmakers do, from evaluation and strategy development to communications and grantee relations. But even the best-laid plans often go awry. According to evaluation expert Michael Quinn Patton, the main problem with the way many nonprofits and grantmakers plan can be summed up in two words: unrealistic expectations.

“Much of the work of planning derives from our hopes, expectations and assumptions about our ability to control things,” Patton said. “But the world never operates the way we want or expect it to. Reality is much more dynamic.”

As a longtime evaluator and former president of the American Evaluation Association, Patton said he cannot count how many times he has been called on to deliver the bad news to an organization or foundation that its plans were not delivering the anticipated results. At the heart of the problem, he explained, is that grantees are compelled to over promise in order to receive a grant.

“These plans are not real from the start. And so there is an inherent disingenuousness in the grantor-grantee relationship that ends up producing deep skepticism about the planning process,” Patton said.

A better approach, he explained, is to have evaluators involved on the

front end of the grantmaking process to bring some rigor to the discussion and to help ensure that people are realistic about what they can attain. Even more important, however, grantmakers and their grantees need to embrace “nonlinear forms of planning” that better reflect how hard it is to predict what will happen on the ground.

Particularly in instances when a grantee or grantmaker is working to change an entrenched system, such as public schools or health care, it is hard, if not impossible, to accurately plan how the work will proceed. “By engaging in systems change, you learn things about the system,” explained Patton. “So engagement itself becomes a form of planning as you begin to reflect and pay attention to what’s going on.”

The key, said consultant Patricia Patrizi, is to keep the planning process open-ended. “Planning traditionally produces a concrete product — the plan — and then you are done,” she said. “The tolerance of disequilibrium is something we need to get better at in the foundation and nonprofit world.”

Organizations also need to think about alternatives to planning, according to David La Piana. La Piana’s consulting firm is currently in the middle of a research project designed to identify such alternatives. Noting

that one of Jack Welch’s first actions on assuming the CEO position at General Electric was to fire the planning department, La Piana said that nonprofits might want to do the same thing, at least in spirit.

“There are ways to get at strategy without engaging in formal planning,” La Piana said, noting that his firm’s research will provide examples of how pathbreaking nonprofits and foundations are doing exactly that.

La Piana and his colleagues already have identified several alternatives to strategic planning, including a “learning model” in which strategic decisions are based on an organization’s ongoing experience. Another alternative, which La Piana called “entrepreneurship,” is founded on the strategic drive that an organization derives from a charismatic and perceptive leader.

“Approaches such as these represent an exciting set of strategic options for the sector, moving us away from one-size-fits-all approaches to strategic planning,” La Piana said.

For more information and updates on La Piana’s research, see www.lapiana.org.



BUILDING A BETTER PARTNERSHIP

The Grantmaker-Grantee Connection



Phil Buchanan, executive director, Center for Effective Philanthropy

“The foundation, its staff, priorities and processes are constantly changing.”

“The foundation ... conducts itself in an ivory-tower-like fashion. It does not feel like an energizing force in the city.”

These comments from non-profit organizations about their foundation funders were collected by the Center for Effective Philanthropy as part of its extensive research on grantee perceptions. As the grantee quotes show, many foundations have a long way to go to earn the trust and respect of their nonprofit partners.

At the same time, however, the survey of 16,000 grantees found many of them singing the praises of their grantmakers. Said one nonprofit executive: “It’s encouraging and comforting to know that we can pick up the phone and call our program officer any time to discuss issues or concerns.”

With foundations focusing more attention on issues of accountability and effectiveness, many say the time is right for a more open dialogue about grantmaker performance with nonprofit grantees. Only by consulting more directly with grantees about their needs and perspectives can foundations be certain they are doing all they can to help nonprofits deliver results.

“We all want to maximize our performance as grantmakers and improve our relations with grantees,” said GEO Chair Janine E. Lee, of the Ewing Marion Kauffman Foundation. “However, there are still some of us who behave as if money confers wisdom and as if we have the golden rules.”

Explaining Differences in Grantee Perceptions

The research of the Center for Effective Philanthropy seeks to create a new set of golden rules for foundations — rules about what it takes to build an effective partnership with grantees. The idea, according to the center’s executive director, Phil Buchanan, is to look at grantee perceptions as an “indirect indicator” of a grantmaker’s performance.

“Most foundations have the same idea of what they want to know: What social benefit did we create relative to the resources we put in?” Buchanan said. Although it is often difficult to measure the aggregate results of myriad grants or to establish a clear connection between cause and effect, grantee perceptions can “answer a lot of questions that foundations want answered,” he added.

It is difficult, however, to get an accurate reading of grantee perceptions, given the obvious tendency of nonprofits to heap praise on their funders. Buchanan and his fellow researchers responded to this challenge in two ways: (1) by using confidential surveys and (2) by using comparative data that ranks the perceptions of an individual grantmaker’s grantees against the perceptions of nonprofits working with other grantmakers.



knowledge on the issues that nonprofits are working to address, even as they strive to influence public policy.

To date, more than 45 foundations have contracted with the Center for Effective Philanthropy to survey their grantees. They include The George Gund Foundation, whose executive director, David Abbott, said the survey and related efforts have transformed the way the grantmaker views its relationship with grantees.



What did the center find? According to Buchanan, three major factors explained most of the differences in grantee perceptions of foundations:

1. *The quality of interactions with foundation staff.* “The frequency of interactions is not the driver here,” Buchanan said, explaining that grantees are more concerned about the foundation’s overall responsiveness and approachability and whether interactions are consistent and fair.
2. *The clarity of communication of a foundation’s goals and strategy.* When foundations are “opaque” about their goals, the partnership suffers, Buchanan said. Grantees want and appreciate candor from their funders about what they are seeking to achieve.
3. *Expertise and external orientation of the foundation.* Grantees also want to see their funders do more than give grants. Foundations should play an active role in advancing thinking and

“You really have to look at the grantees and the foundation as the same organism,” Abbott said. “Our grantees are carrying out the work we care about, and we need to know what they’re thinking.”

Grantmaking Practices That Improve Nonprofit Performance

But how can a foundation do a better job incorporating grantee perspectives into its day-to-day operations? How can grantmakers ensure they are doing everything they can to help their grantees be effective? Foundation executives and other experts identified three steps to a better relationship.

Step 1: Streamlining Grantee Reporting

Step one, according to many grantmakers and grantees alike, is to adopt a more user-friendly approach

to grantee reporting.

“By making our reporting requirements less cumbersome, we can help save precious nonprofit time and energy,” said Susan Herr, managing director of accountability initiatives for Community Foundations of America. “At the same time, we may be able to get more meaningful information we can use to improve our own effectiveness and tell our story.”

At the Sobrato Family Foundation, shifting to user-friendly reporting has meant consolidating all of a grantee’s reporting at the end of a grant period into a one-page form with just three questions. The foundation also requires grantees to file all of their information online with GuideStar (www.guidestar.org), the national database of nonprofit organizations.

“GuideStar gives you one place where the foundation and the larger community can go for information about all aspects of its work,” said Sobrato Foundation Executive Director Diane S. Ford.

Step 2: Providing Support During Times of Transition

Another way to strengthen the relationship between grantmakers and grantees is to provide focused support to nonprofits during times of leadership transition. Although foundations traditionally have been cautious about supporting nonprofits undergoing leadership changes, a new capacity-building model is founded on the belief that such changes provide pivotal moments for organizations to re-examine current practices and direction.

According to Tom Adams, a consultant with the Annie E. Casey Foundation’s Leadership Transitions Project, as many as 78 percent of nonprofit executives plan to leave their current job within the next five years. “There are more executives leaving now than at any time in history,” Adams said.

One way in which grantmakers are responding to this trend is by embracing Executive Transition Management, which provides nonprofits with a menu of services — from leadership succession planning and interim executive referral to coaching for the new executive.

Funder leadership and collaboration during the transition process are key, according to Adams. He added that the Casey Foundation, in addition to providing support for executive transition for its own grantees, has

“There are more executives leaving now than at any time in history.”

— Tom Adams, consultant, Annie E. Casey Foundation

joined with others to provide funds to the Maryland Association of Nonprofit Organizations for a wide-ranging Executive Transition Initiative.

Among the organizations benefiting from the Maryland effort is Self-Help for Hard of Hearing People. “Assisting board members to identify characteristics we needed in an executive director helped to focus us all in the same direction and helped to clarify our role as a board,” said the organization’s president, Ann Liming.

Step 3: Aligning Economic Cycles and Foundation Cycles

A common complaint among grantees is that funders tend to scale back their giving at exactly those times when demand for services is high — i.e., when the stock market and the economy are slowing down. Rick Cohen, of the National Committee for Responsive Philanthropy, said funders would do better by their grantees — as well as the larger causes they are working on — by paying less attention to the ups and downs of their investment portfolios.

“The usual context for how much

foundations give is what the stock market is doing,” Cohen said. “The real issue is to start thinking in terms of the context nonprofits face.”

Cohen suggested that foundations consider maintaining or increasing their contributions in times of economic stress — a strategy that is being put into practice by the Toledo-based Needmor Fund.

According to Needmor board member Mary Stranahan, the fund has in recent years made a concerted effort to maximize the growth of its portfolio

of socially responsible investments. This has allowed the grantmaker to boost its payout rate to 6 percent of assets per year.

“Our bottom line is to get the money out on the street in the hard times, because that’s when our grantees are struggling the most,” Stranahan said.

The William and Flora Hewlett Foundation’s approach to helping grantees weather economic storms has been to make a wide-ranging commitment to grants for core operating support. At the John S. and James L. Knight Foundation, which seeks a payout rate of 5 percent (excluding administrative expenses), a key strategy for dealing with economic troubles is to keep funds in reserve. According to Belinda Lawrence, the foundation’s vice president and chief administrative officer, the reserve covers grants made over a three- to 12-month period so that Knight can continue making grants at a consistent level.



ALIGNING GOALS AND RESULTS

Approaches to Evaluation

Photograph: Robertson Adams

Measuring impact. It has become a do-or-die issue for grantmakers in recent years. But urgent questions remain about how to do it right.

Jason Saul, co-founder of the Center for What Works, identified three major challenges facing grantmakers as they set out to gauge the results of their work. The first, he said, is that there is “no backend to the grantmaking process.”

“At the front end, foundations receive grant applications, conduct due diligence, perform site visits and do grant accounting,” Saul said. “But they don’t do the backend pieces as well, such as measuring outcomes, reporting,

stating results, sharing best practices and spreading learning to the field.”

The second challenge is that foundations have not found effective ways to measure grantee performance. Saul pointed out that even the most comprehensive source of information on nonprofits, GuideStar, relies primarily on tax data and provides no information on the actual impact of an organization’s work.

Third, Saul said, foundations face the challenge that their current reporting is not designed to provide information on “aggregate overall portfolio impact,” or the collective results of the foundation’s grants.

“In foundation annual reports, you find basic information that doesn’t take it to the next level,” Saul explained. “There’s nothing there that says whether your initiatives succeeded or

not, or whether you can look across all your grantees and assess the ground you’ve gained.”

Saul’s company, B2PCommerce Corp., has been working with Community Foundations of America to develop a Web-based tool designed to track the performance of a portfolio of grantees. Called Impact Manager, the program enables grantmakers and their grantees to collaboratively set outcomes and measures, track performance and report results in a systematic way (for more on Impact Manager, see www.measuringimpact.com).

“In the past, foundations have relied on nonprofits to state what their outcomes, measures and benchmarks were,” said Amos Smith of the Community Foundation of Greater New Haven, which is using the Impact Manager program. “Under the Impact



Manager scenario, they work together to create more realistic, measurable goals.” In addition, Smith said, the foundation now is able to piece together all of its grantees’ individual working goals and assess the extent to which it is delivering on its mission.

“We realized many of the nonprofits we were working with needed operating support, and we also saw value in strengthening the technical assistance available to these groups.”

— Helen Davis Pitcher, director of evaluation and research, The William Penn Foundation

Evaluation as an Advocacy Tool

Having that kind of detailed information on the impact of grantmaker activities is essential, according to Judith M. Gueron, president of the Manpower Demonstration Research Corporation. Gueron’s studies on employment topics are widely credited with advancing the national debate on issues from welfare to income security.

But showing a return on grant investments is not the only reason — or even the most important reason — why grantmakers should engage in rigorous measurement and evaluation, according to Gueron. Rather, grantmakers need information on the impact of their

investments in order to demonstrate to policy makers and others what works — and what does not — to address the problems facing society.

“Most of us have a common goal: We work at what we do because we want to leave the world a better place,”

Gueron said. “Quality evaluation is one of the most powerful ways to advance toward our goal of making progress.”

To demonstrate how evaluation can have an impact on policy, Gueron cited the example of the Perry Preschool Project, a rigorous, multiyear evaluation that showed the impact of high-quality preschool on participants’ educational performance and earnings later in life. The study’s findings have been an important factor in creating broad political support for quality preschool programs, such as Head Start.

Because grantmakers can take risks and invest in new ideas and promising approaches to social problems, they

have a responsibility to society to make a serious effort to measure the results of those investments, good or bad. To the extent that grantmakers want to promote more widespread adoption of specific policies and approaches, policy makers and the public will want evidence that those policies and approaches can work.

“To have a permanent legacy, you need to change the truths,” Gueron advised. “You need to change the policy process so that there is more funding or so that funds go to effective programs.

“The more unimpeachable your evidence, the greater are your chances of being listened to and not seen as another pressure group,” she continued.

The Elements of a Quality Evaluation

The key to a quality evaluation, according to Gueron, lies in good relationships. The evaluator must be viewed within the organization and among its grantees as a partner in answering important questions about their work.

The partnership theme was echoed by Martha S. Campbell, vice president for programs at The James Irvine Foundation, who remarked that evaluation is less about ensuring compliance with procedures and goals than about informing the strategic direction of the organization.

“Evaluation helps to use the past to inform the future,” Campbell said, noting that grantmaking executives need to be clear with program staff — and evaluators as well — about the purpose of evaluation and its link to the broader mission of the organization.

Executives also need to be clear that they are not interested in playing a game of “gotcha” with staff or grantees. “The organization must have a culture where it is OK to learn and fail,” said Grant Oliphant, associate director of The Heinz Endowments. “There has to be a constant affirmation of evaluation’s importance in advancing the foundation as a whole.”

Another critical element of a quality evaluation, according to Gueron, is a focus not just on outcomes but on impacts as well. An outcome, she explained, is the status of an individual or group at a given point in time — such as the percentage of people in jobs. By contrast, “impact” measures a change in status as a result of a specific intervention. An impact, in other words, has to take into account what would have happened if the interven-



tion had not happened.

of the program in changing conditions and opportunities for people may have been minimal.

“When people want an evaluation, it is often to *prove* that an initiative works rather than to *learn* whether it works,” concluded Gueron.

“When people want an evaluation, it is often to *prove* that an initiative works rather than to *learn* whether it works.”

**— Judith Gueron, president,
Manpower Demonstration Research Corporation**

tion had not happened.

One problem related to an outcomes focus is “creaming,” a situation in which grantees and their funders might be tempted to serve individuals and groups with a higher chance of success in a given program. A singular focus on outcomes — for example, how many people got jobs after participating in a training program — would ignore the fact that many of the participants would have gotten jobs anyway. In other words, the real impact

To conduct quality evaluations, she added, grantmakers need to be clearer about their theory of change. Evaluation becomes a means for testing that theory and, if it is proved wanting, for changing it to better reflect the real world.

Evaluation in Action: The William Penn Foundation

In 1995, the Philadelphia-based William Penn Foundation decided to step up its efforts to strengthen the

organizational capacity of nonprofit organizations working in the surrounding Delaware Valley region. The foundation’s three-pronged strategy was to (1) provide increased support to technical assistance providers, (2) to provide general operating support through regranting programs with intermediaries such as the United Way and (3) to boost direct grants by 10 percent to account for operating support needs.

“We realized many of the nonprofits we were working with needed operating support, and we also saw real value in strengthening the technical assistance available to these groups,” said Helen Davis Picher, the foundation’s director of evaluation and research.

After several years of expanded support for capacity building, the foundation decided to see what was and wasn’t working — and what might be improved. It retained TCC Group (formerly The Conservation Company) to address several questions about its capacity-building work, including:



Edward Skloot, executive director, Surdna Foundation

- What is the current state of the art in capacity building?
- How do the foundation's current grants align with best practices in the field?
- How effective are the current grantees at delivery of services, management and use of state-of-the-art techniques?

The “best practices” focus of the foundation's evaluation efforts was dictated by a need for benchmarks to allow comparisons of diverse activities undertaken by a range of organizations.

“In a lot of cases, it was like comparing apples and oranges,” said TCC Group's Peter York, who oversaw the evaluation.

Because of the focus on best practices, the foundation and its evaluators agreed they would have to rely extensively on qualitative research — primarily interviews and focus groups with technical assistance providers and their clients. In addition, TCC Group and the foundation developed a survey for nonprofit

organizations that asked a number of questions about their capacity-building activities and needs.

The William Penn Foundation has posted the results of its evaluation on its Web site, www.william penn foundation.org. Although the research found that technical assistance providers have effectively supported nonprofit organizations in the region, it identified several ways in which the providers can strengthen their work:

- Provide more integrated approaches for addressing such critical elements of organizational capacity as “proactive leadership” and “reflective planning.”
- Improve consulting practices so that the value they add to organizations is not lost at the end of the engagement.
- Improve quality control for all of the services they provide through consistent and effective evaluation.
- Improve “capacity-specific” assistance (e.g., technology) by taking a more holistic, organization-

wide approach to the intervention or engagement.

“Seeing our grantees in the context of best practices was extremely helpful,” said Picher. She added that the evaluation has provided the foundation with a better framework for judging new proposals and for asking grantees the right questions about their capacity-building needs.

Evaluation in Action: Social Venture Partners

Social Venture Partners Seattle was born in 1997 as the concept of venture philanthropy was gathering steam. SVP Seattle has a two-track mission: to inspire philanthropy and volunteerism while helping local nonprofits become more effective.

When SVP Seattle turned 4 years old in 2001, its founders and partners decided they wanted more information about how they were measuring up. The organization engaged Blueprint Research and Design Inc. to conduct a comprehensive evaluation that started with an articulation of SVP Seattle's theory of change, including expected outcomes.

“We wanted to know how effective we were, what we were doing that worked and what didn't,” explained SVP Seattle Executive Director Paul Shoemaker. “And, more than anything else, that meant testing our theory of change.”

SVP Seattle's research methodology centered on the selection of a diverse group of seven long-term “investees” — including some organizations judged to have a less-than-optimal relationship with SVP Seattle.

Evaluators employed the McKinsey Capacity Assessment Grid with the investees to help guide them through a systematic review of their growth in capacity. The evaluation team at Blueprint Research and Design also conducted interviews and focus groups

with senior managers at the nonprofit organizations, as well as interviews with SVP Seattle's lead partners. Additional research focused on other volunteer matching organizations to compare their processes and results with SVP Seattle's.

Blueprint then organized a focus group of investees so it could present the preliminary research findings. "This was a validity check among the stakeholders to see what really resonated with them," explained Blueprint's Kendall Guthrie.

After Blueprint refined its findings based on the focus group, it presented them to SVP Seattle. Among the key results, according to Shoemaker, is that all long-term investees who were interviewed experienced growth in organizational capacity during their relationship with SVP Seattle. The most consistent growth occurred in the capacity areas of technology, outcomes management and board development.

At the same time, the research showed that SVP Seattle was not doing as well as it had hoped in the area of leadership development for its investees. This prompted the organization to revise its guidelines on when to use volunteers to provide technical assistance and when to use paid consultants. SVP Seattle also was not satisfied with what the evaluation said about its efforts to support investees in their marketing efforts and, as a result, is paying closer attention to that issue.

Equally important, SVP Seattle has used the evaluation as a platform for using the McKinsey Capacity Assessment Grid with all investees. "This lets us get started more effectively with these people so we know what areas they need to work on and where we can be most effective," Shoemaker explained.

AT ISSUE: EVALUATING GENERAL OPERATING SUPPORT GRANTS

It is no secret that many funders shy away from making general operating support grants. The reason, more often than not, is the perception that it is hard to measure the impact of these grants.

According to Ruth Brousseau, of The California Wellness Foundation, that perception is wrong.

In 2001, Brousseau said, CWF began to emphasize "responsive grantmaking," which meant, in part, a new focus on providing grants for core operating support. "We were concerned that the initiatives we were funding did not have staying power," she explained. "So we wanted to provide grantmaking that would truly enhance the sustainability of organizations."

CWF evaluates the results of its operating support grants in the same way that it measures other grants. "For every grant, we have two or three grant objectives that the grantee is responsible for, and we measure against that," Brousseau said.

Brousseau referred to this type of grantmaking as "negotiated core operating support," adding that it is very different from providing the grantee with a blank check for administration, marketing and other costs. "The critical question is how you structure these grants," she said.

Another provider of general operating support grants that is working on evaluation issues is the Edna McConnell Clark Foundation. The foundation's Youth Development Fund has created a detailed system for evaluating the results of operating support grants to organizations working to improve outcomes for young people (see www.emcf.org/pdf/emcf_indicators.pdf).

David E.K. Hunter, director of evaluation and knowledge development at the foundation, agreed with Brousseau that evaluating general operating support grants is no more complicated than evaluating other grants.

"Like anything else, it requires clarity from the beginning about what the grantee organization wants to accomplish and what the indicators for success will be in establishing that these objectives have been achieved," Hunter said.

Hunter added that the framework for evaluating general operating support grants can provide nonprofit organizations with the basis for ongoing performance monitoring and quality improvement long after the original grant is made.

Hunter's comments were echoed by Sara Solotaroff of The Chicago Community Trust, who said the evaluation process has strengthened the grantmaker's interactions with grantees. Using Impact Manager software (see Page 13, "Aligning Goals and Results: Approaches to Evaluation"), the trust works with grantees to track progress on three priorities for every general operating support grant.

"This allows for Web-based interaction and pushes organizations to set up strategies so that organizational health is thought about in advance," said Solotaroff.



ALIGNING WITH COLLEAGUES

Collaboration in Philanthropy



A group of California grantmakers come together to address the HIV/AIDS crisis in communities of color. The Baltimore Giving Project unites local grantmakers in an effort to encourage new foundations, charitable funds and corporate giving programs in the area. Hispanics in Philanthropy has grown from a small network of 10 people to a national organization with more than 450 members.

Intent on improving their effectiveness and making connections with others engaged in similar work, grantmakers across the United States and throughout the world are engaging in new partnerships and collaborations.

In the words of Katherine Fulton, grantmakers are “overcoming barriers to alignment” — barriers that include a lack of time and resources for productive collaborations, as well as a historic tendency among grantmakers to work independently on isolated projects.

“Foundations are moving from a framework of having separate assets to one where there are collective assets,” said Fulton, who, as head of the Monitor Institute and a partner with the Global Business Network, has conducted extensive research on trends in philanthropy.

“What we are seeing is a key new part of the ecology of philanthropy,” added Andrew Blau, Fulton’s colleague at the Global Business Network. Instead of working together at the “macro level” on general issues confronting the philanthropic sector, Blau said funders increasingly are drawn to “tight-knit collaborations” with specific goals in mind.

Surveying the Field

Blau’s and Fulton’s observations were confirmed in recent research on funder networks conducted by GEO, in partnership with the Council on

Foundations, the Forum of Regional Associations of Grantmakers and the Funders' Network for Smart Growth and Livable Communities.

GEO's research confirms that large and small funders alike share a newfound interest in working together (see "Effectiveness Practices of Foundations," Page 7, for more on the research effort). During the 1990s, the researchers found, grantmakers created twice as many funder networks as they did in the 1980s. During the first 2 ½ years of the 21st century, the number of these networks grew by another 40 percent.

According to GEO's research, today's networks often are established



to promote learning, knowledge sharing and networking among previously isolated funders. Networks also are coalescing around specific issues and interests — from AIDS and health care delivery to education and conservation — as well as specific challenges confronting local communities and regions.

"Funder networks are the breeding ground of innovation and the classroom of collaborative philanthropy," noted lead researcher Steven LaFrance of LaFrance Associates LLC.

Reasons for Collaboration

Why are grantmakers showing an

RECOMMENDATIONS FOR AN EFFECTIVE FUNDER NETWORK

Research conducted by GEO — in partnership with the Council on Foundations, the Forum of Regional Associations of Grantmakers and the Funders' Network for Smart Growth and Livable Communities — has identified nine critical steps to building an effective funder network.

- 1. Identify the need or issue.** Funder networks tend to emerge organically in response to a specific need or issue. They are uniquely intentional entities that build on the energy and vision of a small group of committed people.
- 2. Call others to action.** Having identified a need or issue, nascent funder networks rally others around their idea. A funder network with promise — one that is meeting a real need — easily galvanizes support.
- 3. Define the common area of interest.** Early in the process, funder network leaders surface differences among members, with the goal of getting to agreement on the common ground.
- 4. Decide on purpose and scope of activities.** The process of surfacing differences and identifying common ground goes a long way toward narrowing a specific purpose and scope of activities. Clarity about purpose and scope is critical to network success.
- 5. Put the structure and process in place.** However formal or informal, funder networks need a structure and a process for operating, including leadership, governance, staffing and support and communication mechanisms. Purpose and scope drive the structure and process.
- 6. Define the scope of membership.** Clear membership criteria are necessities for an effective funder network. As with the structure, the network's purpose and scope help to answer questions about the types of organizations and individuals to invite.
- 7. Generate revenue.** Funder networks operate on a range of funding models, including 100 percent in-kind donations, requiring contributions to a pooled grantmaking fund, instituting membership dues and earning income.
- 8. Develop a plan for sustainability, sunseting or evolution.** Funder networks are the most agile organisms in philanthropy, characterized by frequent fission and fusion. They emerge in response to needs, fade out as needs are met, or evolve as needs change over time.
- 9. Take time to reflect.** Networks, like any effective organization, set time aside at regular intervals to think about where they've been and where they're going.



Katherine Fulton, Global Business Network

increased interest in working together? The main reason is a growing acceptance that collaboration is the only way to effect real change. As GEO Execu-

organizations to find others who share their interests and goals.

Over the last two decades, Fulton pointed out, the number of nonprofit

“In the past, the genetic code of the U.S. nonprofit sector was to let a thousand flowers bloom.”

— Katherine Fulton, Global Business Network

tive Director Kathleen Enright put it: “The problems that we are all trying to address are out of scale with our individual resources and ability to address them.”

Katherine Fulton pointed to two additional reasons why increasing numbers of grantmakers are aligning with their colleagues in new ways. The first is the simple fact that grantmakers and the nonprofits they support are growing rapidly in number, creating more opportunities for individuals and

organizations in the United States has doubled. Moreover, 65 percent of large foundations have come into existence in the last generation. The result: “There are more actors to align with, and therefore more chances to achieve critical mass,” she said.

The second reason Fulton cited for increased collaboration relates to the potential downside of the upsurge in nonprofit and philanthropic organizations. For a nonprofit sector that is

under increasing pressure to deliver results, reducing fragmentation and duplication of effort is essential.

“In the past, the genetic code of the U.S. nonprofit sector was to let a thousand flowers bloom,” Fulton said, noting that today’s problems demand a more coordinated response.

Looking Ahead: The Future of Collaboration

These and other forces suggest to Fulton that collaboration in philanthropy will grow even more in the years ahead. To support her prediction, Fulton cited Thomas W. Malone’s book, *The Future of Work* (Harvard University Press, 2004), which makes the case that technological and economic forces will soon make a “command-and-control” approach to management obsolete. In its place will be a more flexible “coordinate-and-cultivate” model that leads to looser organizational structures.

“It is all about the decentralization of power,” Fulton said, noting that real movement on the issues confronting the nonprofit and philanthropic sectors in the future will come not from individual institutions and organizations but from “webs of innovation and advocacy.

“Organized philanthropy will no longer be equal to foundations,” Fulton added.

But alignment cannot happen on its own, nor can collaboration automatically improve funder effectiveness. It all depends on how alignment is done.

Based on its research, GEO has identified nine critical elements of an effective funder network (see Page 19, “Recommendations for an Effective Funder Network”). Boiled down, these guidelines suggest that grantmakers need to be specific and intentional about what they are trying to accom-

plish in coming together in a network — and about how they will achieve their goals.

According to researcher LaFrance, the key to the success of both individual funder networks and the broader alignment movement is relevance.

“There is increasing market pressure on networks to be relevant and responsive,” he said. “And so the question is: ‘Are they addressing needs that are relevant and that make a difference?’”

Ben Starrett, founding executive director of the Funders’ Network for Smart Growth and Livable Communities, added that the future of networks like his consortium of 97 grantmakers depends on the members they attract.

“The impact that networks will have in the future is an unwritten story,” Starrett said. “It will depend a great deal on the leadership that gravitates to these networks and on the people they can draw in.”

Maximizing the effectiveness of networks and collaboration is not going to happen overnight, cautioned Edward Skloot, executive director of the Surdna Foundation. “The history of philanthropy is a history founded on a culture of individualism and a lack of collaboration and cooperation,” Skloot said, citing the creation of large independent foundations by Andrew Carnegie, the Rockefellers and other industrialists.

Although crediting traditional philanthropy with achieving significant gains in areas from public education to civil rights, Skloot said today’s grantmakers need to adopt a more “systematic approach” to complex social problems, working with other funders, government and communities to shape solutions. “There is a whole new kind of learning that has to go into our DNA as we move forward,” he said.

RESEARCH RESULTS: FUNDER NETWORKS IN ACTION

In 2003, GEO received funding from the David and Lucile Packard Foundation to conduct research to map the landscape of funder networks.

GEO partnered with the Council on Foundations, the Forum of Regional Associations of Grantmakers and Funders’ Network for Smart Growth and Livable Communities to build on existing research and create a broad picture of networks in philanthropy.

The research consisted of a survey of 325 funder networks, including affinity groups, regional associations, collaborative funds and less formal networks. Of the 325 identified networks, 182 responded for a 55 percent response rate.

At the outset of the study, the research advisory group developed three working criteria for including a network in the sample: network members are primarily funders; there is some formal organization to the network, however limited that might be; and the network has a stated purpose or goal for being.

Among the key findings:

- Forty-six percent of networks were organized in the 1990s, compared to just 22 percent in the 1980s and 15 percent before then.
- More than two-thirds of networks (69 percent) first formed due to the emergence of a growing number of funders interested in a common issue.
- Most funder networks define themselves around geography.
- Half of funder networks have 25 or fewer organizational members.
- For the most part, networks have small staffs, if any staff at all.
- For the vast majority of networks, the promotion of funder learning, building funder knowledge and providing networking opportunities are the most important priorities.



To gain a clearer picture of the work of funder networks, GEO also conducted case-study interviews with 16 networks nominated by survey respondents and produced five reports exploring specific topics raised in the research.

For more information on the research, see www.geofunders.org.

ONE PHILANTHROPIST'S PERSPECTIVE ON ALIGNMENT



Paul Brainerd, founder, Brainerd Foundation and Social Venture Partners Seattle

Paul Brainerd grew up in a small town in southern Oregon, where his parents owned a store. He remembers a time when the local mills closed and unemployment in the community reached 20 percent.

“My father kept accounts for many of the local families, and all of a sudden a lot of these families weren’t paying,” Brainerd recalled.

His father’s response: They’d pay when they could.

“Having that kind of connection with real people in a real community is something I have carried with me through life,” Brainerd said.

Today, Brainerd’s life is all about connection — the connection between humanity and the environment, between education and citizen action, and between philanthropy and results.

After the sale of the Aldus Corporation, which he had founded in 1982, Brainerd established the Brainerd Foundation and Social Venture Partners Seattle, as well as other charitable and philanthropic organizations.

“All these organizations revolve around my core passions: environment,

education and giving back to the community,” Brainerd explained. He added that his move from the world of business into the world of philanthropy is the story of “one man’s path to alignment.”

Brainerd’s lifelong interest in conservation issues drives the mission of the Brainerd Foundation, which has assets of \$40 million and makes grants of \$2 million to \$3 million each year to organizations working to protect the natural environment of the Pacific Northwest. Brainerd’s commitment to the environment also is the spark behind two other organizations he founded: Conservation Strategies, which recruits and trains candidates for public office based on their commitment to protecting the environment, and ONE/Northwest, a nonprofit that provides technology resources and expertise to environmental groups working in Alaska, British Columbia, Washington, Oregon, Montana and Idaho.

Although each of these organizations is independent of the others, their work is mutually reinforcing, according

to Brainerd. “At the foundation, for example, we’re working with nonprofits to pursue effective and innovative approaches to environmental problem solving, but you really can’t do that without strong public policies,” he said. “And that’s where Conservation Strategies comes in. We’re working to get people into public office who will make good decisions about these issues.”

From education and citizen action to the work of individual nonprofit organizations, Brainerd’s path to alignment continues. “As individuals, we bring values and passion to the work we do,” Brainerd said. “That’s where alignment begins.”

CONCLUSION

Today, the philanthropic sector is facing unprecedented scrutiny and pressure to demonstrate results. At GEO's 2004 National Conference, grantmakers discussed countless examples of how foundations and their nonprofit partners are responding to these pressures, as well as countless ideas for strengthening grantmaker and grantee performance. They also acknowledged the need for improved practices in areas from planning and evaluation to communications and grantee relations.

The conference theme of alignment provided a call to action for grantmakers to take a fresh and objective look at practically everything they do. It is a call to align goals, strategies and results; a call to forge stronger partnerships with nonprofit grantees; and a call to work together more effectively with other grantmakers to address the urgent issues facing communities today.

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