





*IDEX is a San Francisco-based non-profit organization that partners with grassroots organizations in seven countries in Africa, Asia, and Latin America, while actively engaging and educating North Americans in the challenges facing communities in these regions.*

*Since 1985, IDEX has channeled over \$2.4 million to fund more than 500 self-help community projects working for social change and economic independence for people, particularly women, indigenous peoples, and youth who earn less than \$1 a day.*

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# From the Chair

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Our work at IDEX during 2003 has been exciting and promising. Our partnerships in Asia, Africa, and Latin America are very solid. Fundraising has been more successful than ever in spite of a flat economic climate, and the impact of our grassroots efforts is clearly being felt.

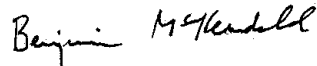
Here are some highlights:

- Ten of our partners have completed a three-year cycle of funding and are moving into a second three-year commitment;
- IDEX provided over \$216,000 in grants to partners – up 5.3% from last year – and facilitated over \$43,000 in direct grants to partners from other sources;
- In February and March, IDEX organized regional meetings in Guatemala, Zimbabwe, and Bangladesh for our partners to meet, share experiences, and develop common strategies. These gatherings not only benefited the partners, but also deepened and added greater transparency to our relationships with them;
- IDEX facilitated three partner visits to the U.S. As guests of leading U.S. institutions, Betty Makoni from Zimbabwe, Elvira Sanchez from Guatemala, and Prakash Tyagi from India were invited to speak at conferences, attend training programs, meet with funders and build connections with other NGOs;
- IDEX made significant progress on a review - funded by a Ford Foundation grant - of democratic principles in our partnership model. We presented our preliminary findings to the Grantmakers without Borders conference in October, and the results have already led to more democratic methods in IDEX's partner selection and participation;
- Contributions from donors to IDEX have continued to increase each month, with individuals and groups providing almost 40% of IDEX's income; more foundations have been attracted to the IDEX partnership model and have made grants, including some which were unsolicited!

2003 saw a leadership change at IDEX. Co-Directors Sarah Hobson and Anne Schonfield are stepping down at the year's end, Sarah to become Executive Director of San Francisco based New Field Foundation, and Anne to devote more time to her expanded family while continuing as a consultant for IDEX. Collectively Anne and Sarah represent seven years of dedicated work at IDEX. Peter Stanga will be taking over as Executive Director in January 2004.

In spite of the leadership change, morale and productivity at IDEX are very high. Indeed, in my nearly dozen years of association with IDEX, I have never seen such stability, professionalism, and commitment as the staff, board, and volunteers have exhibited these past months.

We are immensely grateful to the individuals, foundations, groups, and corporations who have supported IDEX and our partners during the year.



Benjamin McKendall, Chair

December 2003

# Program Overview 2003

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The purpose of our programs is to support long-lasting social change at the grassroots for communities that are disadvantaged for reasons beyond their control. These communities include indigenous people who have suffered from years of military occupation or civil war, rural people dependent upon farming who face ongoing drought or loss of their land, girls facing sexual violence in a region with one of the highest rates of HIV/AIDS in the world, and young people trapped by unemployment in their shanty-town or township.

To ensure that resources reach the people who most need them, and who will use them most effectively, IDEX works with highly successful grassroots groups that are working to solve problems of poverty and injustice in their own communities. A fundamental principle of our work is to support the vision and priorities of our partners through long-term partnerships. We work collaboratively with our partners, as equals, using democratic processes that promote shared decision making, mutual accountability, and open communication.

In 2003, IDEX supported the cutting-edge work of 13 partner organizations based in Bangladesh, Guatemala, India, Mexico, Nicaragua, the Philippines, and Zimbabwe. Through women's and girls' empowerment, youth education and training, sustainable agriculture, and micro-credit lending, our partners bring benefit to more than 1,000,000 people across three continents.

During 2003, our program work had three main components:

## Grant Making

IDEX distributed over \$216,000 in grants to our 13 partners to support their grassroots economic empowerment work. IDEX provides grants to each partner for at least 3-6 years, understanding that regular, long-term funding helps secure the success of our partner's work. IDEX grants are significant since they fund cutting-edge social change work that our partners cannot find support for from mainstream funding agencies. (See pp. 7-11 for specific details of our Partnership Grants.)

## Alliance Building

IDEX provides a variety of services and resources to partners to help them build alliances with each other, with U.S. funders, and with NGOs throughout the world that are working on similar issues. This year, IDEX organized partner meetings in Zimbabwe, Guatemala, and Bangladesh (which a Zimbabwe partner attended through an IDEX sponsored partner exchange) where our partners gathered to share strategies and develop regional plans. IDEX also organized visits to the U.S. by partners from Zimbabwe, India, and Guatemala that helped our partners network with funders, journalists, and community-based organizations in the Bay Area and New York. In addition, IDEX facilitated the participation of two partners in the first-ever international Fair Trade Expo and Symposium in Cancun, helping partners to market their crafts and Fair Trade products. These activities resulted in an additional \$43,580 in grants that were sent directly from U.S. funders to partners.

## U.S. Public Education

Through our bi-annual newsletter (5,000+ recipients), monthly eUpdate report (currently 1,790 subscribers per month), website (over 75,000 visitors each month), and IDEX community events, we are able to bring the voices of our partners and their communities to the U.S. public. In 2003, IDEX also made presentations at eight conferences, reaching 2,000 people. This interaction helps to create a network of people and institutions in the U.S. with long-term commitments to the work of our partners and their communities.

# Program Objectives 2004

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## A F R I C A

1. Provide \$39,000 in grants to three partners.
2. Provide \$12,000 in Catalyst Grants to four new grantees in South Africa.
3. Facilitate one partner visit to the U.S., and one Africa Regional meeting.
4. Ensure the appointment of an African partner representative to the IDEX board.
5. With a dynamic core team of interns, increase exposure of diverse U.S. audiences to the community work of Africa partners and the challenges they face.

## A S I A

1. Support five partnerships in Bangladesh, India, and the Philippines with grants of \$13,000 each.
2. Start Catalyst Grant Program with grants of \$3,000-\$5,000 each, to groups in Nepal, India, and Bangladesh.
3. Conduct research, exchange best practices, and work jointly on projects related to food security through sustainable resource management and women's rights.
4. Increase IDEX connections with U.S. foundations and individuals to share information about the work our partners are doing and to increase resources.

## L A T I N A M E R I C A

1. Increase Partnership Grants by 15% over last year.
2. Support three new groups with Catalyst Grants of \$3,000 - \$5,000 each, to be selected in consultation with existing partners.
3. Obtain commitments from U.S. distributors to carry Fair Trade coffee or crafts from at least two of our partners.
4. Conduct public education about alternative development strategies in Mexico and Central America through donor potlucks, presentations at schools and businesses, partner speaking tours, new web content, and eUpdates.
5. Launch Spanish-language content on our website, with direct input from our partners.



# Partnership Grants 2003

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## AFRICA

### Credit Against Poverty (CAP), Zimbabwe

Located in the rural district of Masvingo, CAP provides micro-loans and basic business trainings in leadership, budgeting, costing, marketing, buying, and pricing to rural women so that they may launch their own income-producing projects. Since 1996, CAP has lent more than 100 million Zimbabwe dollars to more than 7,000 clients.

- **\$11,000** Distributed 110 loans, at an average loan size of US\$100, to 110 rural women. Each woman is charged a \$3 loan fee that pays for all processing and administration costs associated with the loan, as well as insurance in case the loan can not be repaid due to death, illness, or other causes.
- **\$2,000** Salaries of CAP's loan officers. Annual salaries range from \$250-\$320 per year and account for rising inflation.

### Girl Child Network Trust (GCN), Zimbabwe

GCN was founded in 1998 as a club for girls facing problems such as forced early marriage, genital mutilation, virginity testing, pre-marital sex, rape, and limited economic options that force the girls into prostitution. Now with over 100 clubs and more than 10,000 members throughout Zimbabwe, GCN projects include education and scholarships, HIV/AIDS prevention, skills training, advocacy, and peer counseling.

- **\$6,250** Construction of the Hwange Empowerment Village for Girls (EV). The village operates as a safe house for thousands of girls in the Hwange area and includes four hostels, two kitchens, classrooms, a museum, and a crafts center. The EV provides education, training and skills development, and income generating opportunities for young girls who face violence and/or are orphans of HIV/AIDS victims.
- **\$3,763** Administration and salaries for the EV administrator and matron.
- **\$2,987** Leadership training for 40 clubs (100 girls in each club), two sexual abuse awareness campaigns in Hwange reaching thousands of girls, abuse counseling for 500 girls, and the reinstatement of 100 girls in school through scholarships.

### Youth Ahead Zimbabwe (YAZ), Zimbabwe

YAZ (formerly KUIYSAP) provides unemployed young women and men with technical training in welding, knitting and dressmaking, as well as skills training in product planning, marketing, quality control, and accounting. YAZ also assists their students with micro-loans to launch their own small businesses after they have completed the trainings.

- **\$6,500** Rent, salaries, and staff training to cover administration costs and increase organizational capacity.
- **\$4,875** Equipment and materials for technical skills training in the welding, knitting, and dressmaking classes offered to 190 unemployed youth in Kuwadzana and surrounding areas.
- **\$1,625** Development of Youth Information Café where area youth can access the Internet and participate in educational workshops about gender, HIV/AIDS, drug and child abuse, reproductive health, and assertive communication.



## Partnership Grants 2003

# ASIA

### Center for Development Services (CDS), Bangladesh

CDS partners with over 200 NGOs throughout Bangladesh to work for the human and socio-economic development of both the urban and rural poor. CDS advocates for the legal, economic, and human rights of women and children, safe water and sanitation, family planning, HIV/AIDS prevention, health and nutrition, and flood preparedness. IDEX primarily supports CDS in the areas of women's rights and economic empowerment.

- \$7,000 Training and project development for 100 indigenous people and their families to start up new businesses and continue income generating activities, such as animal husbandry, agriculture, and handicrafts.
- \$4,000 Salaries, training, travel, and organizing costs for community workers.
- \$2,000 Entrepreneurship training to enhance the capacity of women.

### Gramin Vigyan Vikas Samiti (Gravis), India

Gravis promotes self-reliance to improve the social, economic and political futures of poor desert communities in Rajasthan, India. Gravis programs include education, health, women's empowerment and income generation, water resources development, agriculture, forestry and land development, and campaigning for the labor rights of mineworkers.

- \$4,800 Promoting the rights of sandstone and marble workers and their families, educating them of their rights and safety laws, and providing legal aid. Launched a newsletter for mineworkers, published educational pamphlets as well as a study and report about child labor in the mines.
- \$4,200 Salaries, training, and travel costs for community workers.
- \$4,000 Construction of a school for the children of mineworkers, a cooperative grocery shop, and medical camps that provide access to medical care and medicine, including the detection and treatment of TB and silicosis, to over 3,000 mineworkers.

### Philippines Partnership for the Development of Human Resources in Rural Areas (PhilDHRRA), Philippines

PhilDHRRA is a national network of social development organizations (SDOs) that seeks to build the capacity of its members to become more effective and self-reliant in order to address agrarian reform and rural development in the countryside. It is composed of 65 SDOs working across two thousand villages in 70 provinces. PhilDHRRA members share the commitment to empower marginalized farmers, fishers, indigenous people, women, and youth through projects that address the issues of livelihood, food security, and community control over local resources.

- \$7,750 Grassroots community support through micro-credit and development of people's organizations (POs) to take over management of the micro-credit fund.
- \$5,250 Build and enhance the capacity of POs in the areas of natural resource management, local governance, gender and reproductive health, and sustainability of social services through advocacy campaigns.



### **Social Advancement Through Unity (SATU), Bangladesh**

SATU promotes women's social and economic empowerment in poor and marginalized communities in Bangladesh through trainings, education, and micro-credit lending. SATU stresses people oriented, sustainable development with a bottom-up and participatory approach. SATU's programs include non-formal education for children, food security and nutrition improvement for the poorest, prevention and elimination of child labor, and agricultural development. SATU reaches over 15,000 women in 400 villages.

- **\$6,053** Funding for SATU's micro-credit program, supporting 100 women to purchase and rear cows and poultry, as well as vegetable production and vending.
- **\$4,578** Program administration including salaries, staff training, loan processing, and site visits.
- **\$2,369** Training for 250 women in crop production, women and children's health, and general nutrition.

### **Women's Empowerment and Leadership Development (Manavi), India**

Manavi is a grassroots organization with programs in Bihar and Jharkand that focuses primarily on reducing poverty and promoting women's self-sufficiency. Manavi works with over 2,000 women in 40 villages on issues such as women's empowerment, micro-credit, skills training, and education. Manavi is also pioneering work on sustainable agriculture and in the area of flood preparedness and management.

- **\$6,000** Micro-credit for various women's groups to launch small income-generating projects in sustainable agriculture. Education campaigns to increase food security and access to public health and education.
- **\$4,000** Salaries, training, and travel costs for community workers.
- **\$3,000** Regional and state level initiatives and educational networks that promote sustainable agriculture, food security, and flood preparedness.



## Partnership Grants 2003 LATIN AMERICA

### **Institute for Overcoming Urban Poverty (ISMU), Guatemala**

ISMU is a coalition of grassroots groups working in 22 squatter settlements in and around Guatemala City that lack many basic necessities, such as decent housing, a sewage system, and potable water. ISMU works to engage and empower these urban groups by providing funds for income-generating projects, credit to build homes, advocacy and skills training. Its primary focus is to develop leadership skills, especially amongst low-income women and youth.

- **\$6,000** Seed funding for micro-credit banks run by low-income women in the neighborhoods of Tecún Umán, Plaza de Toros, and Palín. The funding provides credit to over 50 women as well as entrepreneurship and skills training so the women can open their own small businesses.
- **\$3,000** Scholarships and leadership training to 30 youth to finish high school and carry out their own community improvement initiatives. Vocational training for 35 youth in carpentry, electrical engineering, and nursing. Enrollment of 35 youth in a weekend schooling program to finish primary and secondary school.
- **\$3,000** Training for women leaders of the ISMU member organization in word processing and database management. Training for an additional 10 women leaders in labor rights, family violence prevention, and child development in order to increase women's leadership capacity and ability to create effective community-based services and advocacy programs.
- **\$1,000** Communication and administrative costs for ISMU programs.



### **K'inal Antzetik, Mexico**

Meaning "Land of Women" in the Mayan language Tzeltal, K'inal Antzetik promotes gender equity, social justice democracy, and political and economic autonomy in Chiapas, Mexico. The organization supports indigenous women's collectives and cooperatives, promotes community-led education, provides training in health and women's empowerment, and promotes the development of a strong civil society.

- **\$3,200** Women's skills-sharing gathering in the Canyons region. Women from 6 municipalities (over 1,200 women) attended to share information about, and skills training in health promotion, bread-baking, candle-making, embroidery, chicken-raising, cooking, and craft-making.
- **\$3,700** Construction of a cooperatively-run and women-owned restaurant, sewing collective, and crafts store. Funds to purchase supplies for the restaurant, a small fund to help stock the crafts store, and seven new sewing machines for the collective.
- **\$4,200** Start-up fund for a coffee and agriculture cooperative where locals can purchase and sell corn, beans, honey, coffee, and seeds. The cooperative is also used as an educational space with sustainable agriculture demonstrations in composting and vermiculture, soil conservation, green manures, and natural pesticides. The funds were also used to build a boot-making workshop and a small recording studio for a musician's collective to record, edit, and reproduce traditional indigenous music for use in local schools and sale in cities.
- **\$1,900** Communication and administrative costs for K'inal's community projects.



### **María Elena Cuadra Movement of Working and Unemployed Women (MEC), Nicaragua**

MEC seeks to empower women in all sectors of Nicaraguan society, particularly factory workers, domestic workers, mineworkers, and unemployed women, and has over 40,000 members. Over 2,000 of MEC's members have been trained as labor rights promoters and have successfully lobbied for changes in the national minimum wage and labor standards. MEC provides scholarships and training programs to women to gain career skills so that they can move out of the assembly lines in the "Free Trade Zones" and gain economic self-sufficiency. MEC also provides loans for women to build their own homes and start their own businesses.

- **\$6,500** Self-Employment Fund for the women of Estelí. Providing credit to 25 women to start their own small businesses, improving the local economy and women's economic independence.
- **\$5,500** Maintenance of a legal clinic that serves over 4,000 women tobacco and garment factory workers in the region of Estelí and Sébaco. The clinic was initiated two years ago with IDEX funds, and handles 200 cases per year, providing low-cost advice and legal help concerning workers' rights violations, domestic violence, and family law.
- **\$1,000** Training in business administration and financial management skills for the women involved with Self-Employment Fund.

### **Social and Economic Development for Indigenous Mexicans (DESMI), Mexico**

Since 1969, DESMI has helped rural, indigenous community groups in Chiapas, Mexico to run their own economic development programs by providing financial, organizational, and technical assistance. DESMI promotes the construction of a Solidarity Economy in Chiapas, the adoption of sustainable agriculture and trade, gender equality, autonomous education, and citizen participation.

- **\$6,000** Revolving loan fund that provides credit to three organic coffee and livestock cooperatives to lease land and purchase necessary agricultural inputs.
- **\$4,000** 20 training workshops for all participating cooperatives in the Northern zone on sustainable agriculture, project administration, and women's leadership. Funds for DESMI staff to conduct site visits to the cooperatives to provide technical assistance and help facilitate problem-solving.
- **\$3,000** Quarterly meetings for cooperative members in the region and bi-monthly leaders' meetings to share information and conduct joint decision-making.

### **Women in Action (MEAi), Guatemala**

Founded by local indigenous women in Chimaltenango, MEAi provides credit and advisory services in order to develop community agriculture, animal husbandry, and artisan projects. MEAi also offers training in business administration, sustainable agriculture, and women's empowerment.

- **\$10,250** Establishment of a revolving loan fund for 30 women in the community of Chichoy to grow organic vegetables to sell in the local markets. Profits are reinvested in materials to make and sell baby clothes.
- **\$2,000** Training for 27 women's groups, reaching over 700 women, in literacy, project management, civic participation, and women's rights.
- **\$750** Training in sustainable agriculture for over 60 women in 10 communities.



# Alliance Building and U.S. Public Education

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## A F R I C A

IDEX has partnerships with three organizations in Zimbabwe, and we are planning to expand to South Africa next summer. Our partner organizations in Zimbabwe provide leadership and micro-enterprise development skills to disenfranchised youth in townships, micro-credit to working poor women in rural areas, and support to students through school clubs, payment of school fees, and leadership training to girls.

### Alliance Building

#### Regional Meeting

In February 2003, all Africa partners attended a three-day Africa Regional Meeting held in Mutare, Zimbabwe. The meeting offered time to review IDEX policy, including the partnership selection criteria, partnership model and process for electing a representative from the Africa region to the international board. Since this was the first time that all of the Zimbabwe partners had come together, the meeting provided a unique opportunity for partners to network and share strategies.

As part of the meeting, partners shared information on how to open legal bank accounts outside Zimbabwe in order to overcome the effects of hyper-inflation. Since that time, CAP has implemented the process and is now able to get nearly ten times the official exchange rate in Zimbabwe.

The gathering spawned two subsequent meetings that helped partners to exchange ideas about best practices, information about office systems, organizational capacity building, and confidentiality. This is particularly important in the current economic and political environment in Zimbabwe, where it is difficult for NGOs to share detailed information.

#### Site Visit by the Program Director

In February, the Africa Program Director Kisha Montgomery and African Program intern Yuri Futamura visited all of our Zimbabwe partners and wit-

nessed firsthand the harsh realities in which our partners work. The Africa Program Director spent substantive time rebuilding the connection between IDEX and our partners through in depth conversations, visits to main office and branch locations, meetings with clients, and the development of joint plans for 2003 and 2004.

During 2003, our partners experienced a severe petrol crisis and shortage of food staples that resulted from a lack of foreign currency and inflation that reached 250%. Inflation made it hard for our partners to commensurate staff with livable salaries since prices for basic goods often climb daily. The



petrol crisis has also made it increasingly difficult for our partners serving rural communities since project sites are often spread apart and difficult to reach. The economic crisis in Zimbabwe placed increasing demands on community organizations and our partners are struggling to keep up with the rising need for their vital services.

The most tangible result of our site visit was IDEX's decision to discontinue the partnership with CHIYSAP in October 2003 as a result of serious organizational, governance, and financial accountability problems that were beyond remedy by IDEX. While there has never been a discontinuation of an IDEX partner before the end of the three-year partnership, the Africa Program feels that this discontinuation has strengthened our partnership model by making IDEX and our partners more accountable to each other and our supporters.



#### **Partner Visit to the U.S.**

Betty Makoni of the Girl Child Network (GCN) visited the U.S. in June 2003, to speak at the Global Philanthropy Forum's conference on Borderless Giving. As a keynote speaker at a plenary on Health, Education and Human Development Betty spoke eloquently about the plight of young girls in Southern Africa. Her talk inspired a

renewed connection with the Three Guineas Fund, who, after an extensive application process, recently awarded \$40,000 to support the IDEX/GCN partnership for the next two years.

During her visit, Betty connected with other GCN supporters in the Bay Area, attended IDEX organized meetings with potential funders, met with local organizations and schools, and conducted a radio interview at KPFA. Betty was also the key speaker at IDEX's community dinner celebrating our work in Africa. Most recently, IDEX received \$10,000 from Flora Foundation as a result of one of the IDEX organized meetings.

## **U.S. Public Education**

### **Exposure, Expansion, Rejuvenation-Outreach, and Fundraising**

During 2003, the Africa Program Director focused on increased outreach to past and potential Africa Program supporters and integrating a team of seven consistent and talented volunteers who assisted with grant making, alliance building, and education activities. Because there is less awareness in the U.S. about the plight of people in Africa than in other parts of the world, the Africa team has focused on raising awareness through public education, including

sending an Africa Program update to over 100 past and present supporters of IDEX.

The Africa Program Director also participated in numerous conferences and public meetings (including Young Donor Organizing Association, Emerging Professionals In Philanthropy, National Student Committee Against Hunger and Homelessness, and the World Affairs Council) to raise awareness about the unique work of our Zimbabwe partners.

In addition, the Africa Program Director helped to form a new network of 14 Bay Area organizations working to support Africa. Priority Africa Network (PAN) is the first collaboration between Bay Area organizations such as Global Fund for Women, Global Exchange, Health GAP, and American Friends Service Committee. PAN is working to promote dialogue, information, advocacy, and media coverage on issues related to Africa, including debt cancellation, gender inequality, and HIV/AIDS. PAN creates a wonderful opportunity for IDEX to promote the work of our Zimbabwe partners and network with like-minded organizations.

## Alliance Building and U.S. Public Education

# ASIA

During 2003, IDEX partners in Bangladesh, India, and the Philippines worked to improve the social and economic rights of mineworkers, promote sustainable resource management in farmland and coastal areas, and assist individuals and groups with successful income generating activities. While the Asia partners' work is varied, all work to improve the livelihoods of those living in marginalized communities in an equitable manner.

### Alliance Building

#### Regional Meeting

SATU, our partner in Bangladesh, hosted an Asia Regional Meeting at their offices in February. The meeting was attended by all regional partners, the IDEX Asia Program Director, an IDEX volunteer from the U.S., and a partner from Zimbabwe.

The first two days of the Asia Regional Meeting focused on partnership issues and the third day was devoted to a field visit to the SATU project area. Through a consultative process, partners nominated Shashi Tyagi from Gravis as the Asia regional representative to the IDEX board, taking over from Hosneara



Ahmed in October 2003. A discussion on common issues led partners to identify "Food Security Through Sustainable Resource Management" and "Women's Rights" as the two most important issues for regional partners to work on together. Luz Angeles Blanco of PhilDHERRA said she felt that, "The discussion on regional issues successfully brought partners to work for a common front." The field visit to the SATU project area enabled all partners to see SATU's innovative work and meet community members. SATU also arranged for our partners to visit other NGOs (BRAC, ASA, and SSS) that are conducting innovative micro-credit work.

#### Democratic Principles of Partnership

The Asia Program Director coordinated a review among all IDEX partners of the democratic principles and practices of partnership. Funded by the Ford Foundation, this very useful study included a detailed questionnaire, discussions with international board members, and in-depth discussions at the three regional partner meetings. The work deepened the relationship between partners, provided important feedback to IDEX, and resulted in significant changes in the way partners are elected to the IDEX board, new partners are selected, and existing partners communicate with each other. As part of the review, IDEX conducted a detailed survey of 23 U.S. based organizations working in partnership with grassroots groups in Asia, Africa, and Latin America, to compare ways of working and key lessons. The findings of the review are to be published in Spring 2004, but initial findings were presented at the Grantmakers Without Borders Conference (GWOB) in October 2003 and a copy of the report will be distributed to all GWOB members.

#### Partner Visit to the U.S.

Dr. Prakash Tyagi, of Gravis visited the Bay Area prior to going to New York to take part in the Ford Motor Company International Fellowship Program of the 92nd Street Y. Dr. Prakash was one of 25 fellows selected to participate in this year's program, aimed at enhancing the efforts of emerging leaders in communities throughout the world. This year's theme was 'Creating a Safer World.' The fellowship enabled Dr. Prakash to attend classes at Columbia University, and meet community leaders from around the world, including India, Pakistan, Israel, Palestine, Algeria, Rwanda, and Poland. While participating in the fellowship, Dr. Prakash made connections with foundations, corporations, and NGOs in the U.S. such as Open Society Institute/PEACE WORKS, Common Grounds, GE, and Ford Motor Company.

While in the U.S., Dr. Prakash had individual and group meetings with major individual donors. He also developed contacts with a number of foundations and NGOs, including the End-Poverty Foundation, Global Catalyst Foundation, Hesperian Foundation, International Rivers Network, and American Jewish World Service. Additionally, Dr. Prakash met with members of Sviz, the Silicon Valley Roundtable on International Development and Information Technology, and Stanford Business School students working on the Stanford LED Lighting Project. LED stands for light emitting diodes, which are solar powered lamps that provide safe, affordable lighting to people in China, India, and Mexico.



## U.S. Public Education

### Outreach in the Bay Area

Asia Program Director Balu Iyer made personal contact with more than 100 people interested in grassroots community development, through a series of lectures and presentations as speaker and panelist. These included a community event in the Mission district of San Francisco on the micro-credit programs of IDEX partners in Bangladesh, India, and the Philippines; the 2003 Stanford Association for International Development (SAID) Conference; the International Career panel at the Goldman School of Public Policy; the annual nonprofits fair of the First Congregational Church at Palo Alto and the annual meeting of the Indian Muslim Relief Committee.

### Focus on Bangladesh

The visit of the Asia Program Director to Bangladesh resulted in the detailed documentation (both narrative and visual) of partnership work for presentation to U.S audiences. In addition to visiting SATU in Tangail, the Asia Program Director visited the Chittagong project area of Center for Development Services (CDS). Chittagong is the second largest city in Bangladesh. The lure of higher incomes attracts large numbers of rural poor who live as squatters with few rights. Their shantytowns are characterized by crowded living conditions, poor housing, and poor access to health services, clean water, and sanitary facilities. CDS works with women in the informal sector and provides them with micro-credit for such activities as small trade, home-based poultry farming, fishing, and backyard agriculture. CDS also identifies group members for intensive entrepreneurial training and business skills development. According to Rehana Begum, a member of the savings and credit group, "The women's group gives me a sense of solidarity. We get together and talk about issues which we can't talk to others... The credit program gives me the opportunity to bring additional money home which helps supplement our income." These projects are now featured by GlobalGiving ([www.globalgiving.com](http://www.globalgiving.com)) and have attracted significant new funding from Bay Area foundations.

## Alliance Building and U.S. Public Education LATIN AMERICA

In addition to our Partnership Grants of \$65,000 (*see pp. 10-11*), we provided \$2,000 in travel grants to support the participation of partners from Guatemala and Chiapas in the Fair Trade Expo and Symposium, and the Solidarity Economics Gathering (*see below*).

Between the fall of 2002 and 2003, IDEX introductions of partners to U.S. funders resulted in an additional \$68,000 in grants sent directly to our partners from such allies as the Tides Foundation, Whole Child Initiative, and Global Fund for Children. IDEX also provided fiscal sponsorship and translation for various partner grant proposals, with a high rate of success.

### Alliance Building

#### Regional Meeting

Ten representatives of DESMI, K'in al Antzetik, ISMU, MEAi, and IDEX came together for a three-day gathering in Antigua, Guatemala in late February, during which we shared information about our work, evaluated our activities, and talked about our strategic direction as a group (Nicaraguan partner MEC was unable to attend). During one day of the gathering, ten Guatemalan community leaders and twelve staff from our partner NGOs attended two workshops: one on the Plan Puebla Panama and another on Solidarity Economics. Guatemalan partner ISMU organized a site visit to the community of Balcones de Palín, where we met with refugees of Hurricane Mitch who, with the support of ISMU, have organized themselves to build their own schools, homes, banks, and job training programs.

#### Partner Visit to the U.S.

In July 2003, three women affiliated with Guatemalan partner ISMU visited San Francisco for three days to attend the Doctors for Global Health Annual Conference. IDEX made all logistical arrangements for the trip, arranging a packed schedule of alliance-building meetings and public education opportunities, including: speaking events at the Global Fund for Women, the Women's Building, and the IDEX office; interviews on KPOO radio and with El

Mensajero newspaper; and meetings with Mujeres Unidas y Activas, Health GAP, the Hesperian Foundation, and the Tides Foundation.

Last year's visit by ISMU General Coordinator Elvira Sanchez resulted in her invitation to join the Global South Advisory Board of Grantmakers without Borders. As an expert in women's human rights and community development, she will provide valuable input to the funders' network in their strategic planning process.

#### Plan Puebla Panama

Since November of 2001, IDEX has been active in the Network Opposed to the Plan Puebla Panama (NoPPP), an association of 20 U.S. and Canadian organizations opposed to the imposition of 28 massive infrastructure projects throughout Southern Mexico and Central America sponsored by the InterAmerican Development Bank. We distributed throughout North and Central America an educational booklet about the PPP, whose production we had coordinated.

During site visits to Chiapas this year, we found that the booklet is being used as an educational tool by a wide variety of community groups. NGO staff and community leaders told us that the booklet filled a gap in available information when the communities were first beginning to organize against the plan, which has now, for the most part, come to a standstill, in part thanks to resistance from organized civil society groups. NoPPP is now considering updating and reprinting the booklet in conjunction with a campaign that targets the InterAmerican Development Bank, which is still pushing implementation of the projects.

#### Fair Trade Expo and Symposium

In September, the Latin America Program Director accompanied representatives of K'in al Antzetik and MEAi to the Fair Trade Expo and Symposium in Cancun, Mexico, an



event parallel to the World Trade Organization negotiations. Organized primarily by IDEX Board member Kari Hamerschlag (through the Institute for Agriculture and Trade Policy), the event brought together over 200 producer groups and NGOs from the Americas, Asia, and Africa to share their successes and discuss how Fair Trade presents a viable alternative to the current inequitable model of global commerce. MEAi sold over \$700 in crafts and made many useful contacts during their visit. IDEX will place an intern with MEAi in 2004 to help establish greater opportunities for distributing their crafts in Fair Trade networks.

### Solidarity Economics Gathering

In November, our Chiapas partner DESMI organized its Third Annual Solidarity Economics Gathering in Chiapas. Each year, the gathering brings together community leaders and NGO staff to discuss community-based models for economic development based on mutual solidarity, Fair Trade, and ecological sustainability. Most of the participants were members of local agricultural and crafts cooperatives. IDEX provided travel funding to facilitate the participation of 40 indigenous leaders from remote areas of Chiapas as well as community leaders from affiliates of our Guatemalan partner ISMU.

## U.S. Public Education

Throughout the year, the Latin America Program Director gave slide shows about Guatemala and Chiapas in a variety of venues, including New College of California, the Parsons Brinkerhoff engineering firm, the IDEX office, at a donor-organized potluck, and on Spanish-language radio. The ISMU partner visit in July also provided opportunities to organize various public speaking engagements.

Site visits to Guatemala and Southern Mexico greatly improved our connection to the grassroots



community groups supported by our partners and provided stories and photos for U.S. Public Education. In March 2003, the Latin America Program Director and Outreach Director were accompanied by our partners ISMU and MEAi to five communities in Guatemala that are organizing to challenge the conditions that cause poverty, illness, and malnutrition in their communities. Women leaders shared their struggles and successes with us, and told us how organizing themselves with the support of our partners has changed their lives. In August, the Latin America Program Director visited five communities in Chiapas, Mexico, accompanied by our partners DESMI and K'in al Antzetik. She was impressed with the success of the organic coffee, crafts, and vegetable-growing cooperatives, community centers, and clinics that have been built there. The stories and photos gathered during these visits formed the backbone of our U.S. Public Education this year.

### U.S. PUBLIC INTEREST IN IDEX AND PARTNERS

*eUpdate Subscribers:* 1,790 currently

*Website Traffic:* 75,000+ visitors each month

*Workshop and Seminar Presentations:* 2,000 participants annually

#### Media Coverage:

4/2003: **Marin Independent Journal**,  
"Unconventional Explorer", by Beth Ashley

7/2003: **KPOO Radio**, Pajaro Latinoamericano Radio Show,  
ISMU partners

8/2003: **El Mensajero**, "Guatemalan Women Stop By for a Visit",  
by Fernanda Albarracin

9/2003: **KPOO Radio**, Pajaro Latinoamericano Radio Show,  
Visit to Chiapas

12/2003: Feature on IDEX democratic partnerships  
in **Alliance magazine**

# Financials

## STATEMENT OF FINANCIAL POSITION

(Audited)

Year ended June 30, 2003

1. Grants to partners were \$216,045, an increase of 5.3% over last year. They represented 38% of total expenses this year and were 39% last year.
2. Administration and fundraising represented 16.6% of total expenses, compared with 18.8% last year. The decrease is attributable to exceptionally effective volunteer contributions in these functions.
3. Net assets increased substantially (by \$91,000) over last year in both restricted and unrestricted categories equally through realization of deferred revenue and growth in unrestricted donations from individuals and groups.
4. Not noted in these accounts, an additional \$43,580 was sent direct to partners in grants facilitated by IDEX from other sources.

<u>CURRENT</u>	<u>\$</u>
Cash	206,472
Grants receivable	41,125
Employee advances	1,004
Prepaid expenses	1,518
<i>total current assets</i>	250,119
 <u>PROPERTY AND EQUIPMENT, at cost</u>	
Equipment less accumulated depreciation	9,152
	259,271
 <u>LIABILITIES</u>	
<u>CURRENT</u>	
Accounts payable	5,221
Grants payable	1,000
Accrued payroll	14,449
Note payable	50,000
<i>total liabilities (all current)</i>	70,670
 <u>NET ASSETS:</u>	
Unrestricted	62,609
Temporarily restricted	125,992
 TOTAL LIABILITIES & NET ASSETS	 259,271



# Organizational Budget

## Fiscal Year '04

ACCOUNT BUDGET AMOUNT  
FY04 (July 03-June 04)

REVENUE AND SUPPORT	\$
Foundations	337,480
Individual	244,447
Corporations	16,600
Consortium for Global Development	57,125
Groups	19,500
Events/Other	3,428
<i>total revenue and support</i>	678,580

EXPENSES

PARTNERSHIP PROGRAM	\$
Grants	
Partnership Grants	198,000
Supporting Grants*	43,580
<i>Alliance Building &amp; U.S. Public Education</i>	
Regional meetings	4,000
Partner visits	5,625
Site visits	14,075
Production & distribution of publications	17,790
<i>total partnership program</i>	283,070
PERSONNEL	
Salaries	245,506
Payroll taxes	22,340
Benefits	35,784
Worker's comp insurance	3,000
Staff travel and conference attendance	9,150
Staff training	2,500
<i>total personnel</i>	318,280
CONSULTANTS, VOLUNTEER PROGRAM	15,600

OCCUPANCY	\$
Rent	29,900
Office maintenance	7,680
<i>total occupancy</i>	37,580
OFFICE, LEGAL, ETC.	
Telecommunications	6,400
Insurance, legal	3,150
Audit, banking, payroll	5,600
Membership fees	1,000
Other office	4,900
<i>total office, legal, etc.</i>	21,050
TOTAL EXPENSES	675,580
CAPITAL EQUIPMENT	
Computers and peripherals	2,500
Furniture and equipment	500
<i>total capital equipment</i>	3,000
TOTAL BUDGET	678,580
TOTAL DEPRECIATION	5,800

\*as of December 2003

# Institutional Donors

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Our grateful thanks to the following for their support during FY03:

## Foundations:

Arntz Family Foundation  
Atkinson Foundation  
Blossom Fund  
Calvert Social Investment Foundation  
Changemakers  
East Bay Community Foundation  
Constans Culver Foundation  
El Norte Foundation  
Food For All  
Ford Foundation  
Global Catalyst Foundation  
The Holder Family Trust  
Lang Foundation  
Levi Strauss Foundation  
Mazon: A Jewish Response to Hunger  
Milagro Foundation  
Nathan & Lena Seiler Family Foundation  
David and Lucille Packard Foundation\*

Peace Through Justice Fund of the  
Tides Foundation  
Peninsula Community Foundation  
The Pittsburgh Foundation  
Robert Field Bullock Foundation  
San Francisco Foundation  
Scott Raymond Evans Foundation  
Skoll Community Foundation  
Share Our Strength  
The Peninsula Community Foundation  
Theodore A. Von Der Ahe, Jr. Trust  
The Catalyst Foundation  
The Tides Foundation  
Threshold Endowment  
TOSA Foundation  
Underdog Fund of the Tides  
Whittier Trust Company  
Zeigler Family Fund

## Groups:

Consortium for Global Development  
End Abuse Family Violence Prevention Fund  
First Congregational Church of Palo Alto  
First Presbyterian Church of Palo Alto  
Gualala Rotary  
IF/W.H.E.N.  
National Student Campaign Against  
Hunger and Homelessness

Smith College African and Caribbean  
Student Association  
St. Mary's College, Feminist Majority  
Leadership Alliance  
United Way\*  
University of Notre Dame  
Third World Relief Fund  
Yale Hunger & Homelessness Action Project

## Corporations:

BD\*  
Charles and Helen Schwab Corporation\*  
CMP Media LLC  
Hewlett Packard\*  
India Arts  
MetaFoods  
Monterey Pasta Co.

*\*through matching gift program*



# Board, Staff, and Volunteers

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## Staff

Lauren Bartlett *Development Fellow*

Yael Falicov *Program Director, Latin America*

Albert Fong *Finance Director*

Sarah Hobson *Co-Director, Organization*

Balu Iyer *Program Director, Asia*

Nathan Joblin *Operations Manager*

Heather Mansfield *Outreach and Communications Director*

Kisha Montgomery *Program Director, Africa*

Anne Schonfield *Co-Director, Program*



## Board Members

Hosneera Ahmed

Alex-Handrah Aimé

Denise Dunning

Albert Fong

Yuri Futamura

Kari Hamerschlag

Sarah Hobson

Jennifer Holthaus

Betty Makoni

Ayesha Mattu

Benjamin McKendall

Betsy Rix

Anne Schonfield

Shashi Tyagi

Yasmina Zaidman

## Volunteers

### *Organization*

Madelyn Chatton

Rachel Kanewski

Judy Lin

Liz Rumsey

Orit Rumstein

Andrew Sargent

Ariel Schindewolf

Deborah Stewart

Gillian Wilson

### *Asia Program*

Julie Chapell

Assem Das

Nalini Negi

Thalika Oum

Beth Rabinowitz

Anuradha Srikantan

Laura Viggiano

### *Africa Program*

Kelly Bradley

Rebecca Chase

Jennifer Chin

Connelly Murphy

Derek Fears

Frances Fontanilla

Yuri Futamura

Robin E. Whittaker-Martin

### *Latin America*

Lily Bartlett Abood

Erin Camarena

Elizabeth Dougherty

Iris Carmelita Garcia

Maria Herbruger

Raquel Hermosilla

Ryan Hofrichter

Stephanie Lindquist

Christian Poirier

Jessica Rhodes



### *Development and Outreach*

Walter Canas

Laura Dodge

Angela Hook

Matthew Perault

Russell Scheil

Anna Shoop

Matthew Wyndham

### *Volunteer Program*

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Lori Saltveit

Carla Sarvis

Deanna Sverdlov

### *Publications Design*

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