

2021

Annual Report



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Carolina Kroon

Dear Colleagues and Friends,

Throughout 2021, we witnessed a proliferation of courageous conversations and sincere efforts across the philanthropic sector to promote wellbeing within communities representing diverse populations across the globe.

Since then, whether examining geopolitical dynamics or analyzing domestic inequities through the lens of their historical origins, the evolution of community needs has required grantmakers to be emergent in our work with nonprofits and communities to be effective. In the face of this trend, GEO's emphasis on collective thriving continues to resonate, and we continue to observe members operate in service of a just and connected society.

But these efforts do not come without their challenges. Over the last several years, we have noticed from the GEO community – its members, volunteers, partners – a resounding desire for meaningful connection during a time when such connection was hampered, or made impossible, in the face of a global health pandemic. In times of discomfort, when many of us experienced high levels of uncertainty and isolation, we redoubled our commitment to establish and affirm spaces where grantmakers could learn, practice and grow together, thereby sharing the burden of leading through the destabilizing impacts of societal inequities.

Additionally, GEO moved through 2021 with the understanding that we could not build a just, inclusive and connected society in one fell swoop. We found new ways to surface and deliberate critical questions together, allowing us to reimagine what is required from each of us to

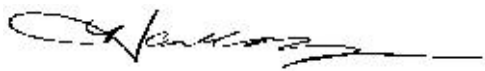


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Carolina Kroon

foster collective thriving despite the complexity of issues facing us. In our first-ever virtual Learning Conference, participants asked not just *what*, but *how* we are making leaps from theory and data to practice. In our publications, we examined how outdated models of grantmaking practice have not always considered dynamics of culture and equity. In our peer networks and interactive webinars, we saw members push themselves to shift power in collaboration with and in support of their peers.

In this report, we are excited to share examples that illustrate some of the ways GEO has continued to be a supportive, resource-rich space for grantmakers to advance social progress through transforming philanthropic culture and practice. We continue to extend our gratitude to the members, partners, supporters and staff who have facilitated, informed and led us to and through these trying years. Though there is more work to be done, the prospect for an invigorated ecosystem for change is bright! We appreciate your committed leadership and look forward to continuing along this path of transformation with you throughout the years to come.

Sincerely,



Hanh Cao Yu
Chair, GEO Board of Directors
Chief Learning Officer, California
Endowment



Denise St. Omer
Vice President of Grantmaking and
Inclusion Initiatives, Greater Kansas
City Community Foundation



Marcus Walton
President & CEO, GEO

GEO HIGHLIGHTS

Leaping Into
Transformational
Philanthropic Culture
& Practice

Walking Our Talk: Steps
Toward External & Internal
Equity

Answering the *How*
of Community-Driven
Philanthropy

◆ Photography Credit: Carolina Kroon

Leaping Into *Transformational* Philanthropic Culture & Practice

Learning and evaluation give grantmakers an opportunity to take stock of what is working – and what is not.

GEO's Learning Conferences are designed to bridge connections between learning and evaluation approaches to the wider societal landscape in which those practices exist. But it is not just *what* we learn that creates meaning and reinforces the purpose of our endeavors.



“

Everyone says, ‘Give me a tool or a checklist,’ but it’s none of that. It’s a new way of thinking, and it won’t happen overnight. You have to practice.”

– Kien Lee, Continuous Improvement in Service of Racial Equity: Linking Strategy, Evaluation and Learning

◆ Photography Credit: Carolina Kroon

At our 2021 Learning Conference, over 700 virtual attendees took the conversation one step further to ask *how* we are making those leaps from theory and data to practice:

Learning With Curiosity

Are we asking *why*? Consider the systems and practices that have been put in place. Do they meet the needs or create distance between the grantmaker and its intended impact?

Learning Responsively

Are we being agile and addressing needs at the pace of change? Community has long been telling us what they know, but we are often reluctant to pivot without outside research, information, data. How can we continue to change at the speed of community – not just in times of emergency, but always?

The 2021 Learning Conference highlighted that grantmakers are well positioned to support community needs, insofar as we are willing to conduct institutional philanthropy in a manner that reflects the best of community philanthropy practices. After the conference, participants left with the question: is philanthropy ready to move from the way we were, to the way we aspire and are being called to be?

This question does not go without its challenges. As grantmakers, we must wrestle with the uncomfortable realization that solutions and responses can shift due to the shifting challenges that nonprofits and communities face as well. Incorporating this truth takes courage: to admit that we may not always know exactly what nonprofits and communities need to thrive. But real change is possible if we commit to collaboration with partners and peers and create relationships hallmarked by trust.

Learning With Equity

Are we being emergent? The solutions we co-create with our partners must always consider the context, and history, of the communities and nonprofits we serve. The more precise we can be with the data we gather and share, the more specific our responses can be.



◆ Photography
Credit: Carolina Kroon

“

One of the things I hear from communities is oftentimes when we talk about data, it is used to show who is doing the worst, and we don't elevate what is actually working – and why it's working.”

– Bo Thao-Urabe, *You Can't Fix What You Don't See: Equity & Grantmaking Disaggregation*

GEO conferences are, at their root, spaces for grantmakers to contribute their insights to benefit a collective reimagining of how institutional philanthropy can be used as a lever for social progress. Through intimate conversation, we move toward tackling big questions together. Borrowing from Nadege Souvenir, COO for the Saint Paul & Minnesota Foundation, we may not know better, but we can do better, and the GEO Learning Conference provided the space for participants to formulate questions to take back and truly wrestle with and integrate into their work.

REFLECTIONS ON GEO'S 2021 LEARNING CONFERENCE

“

2020 showed us that philanthropy can change quickly – more general operating grants, changing application requirements, increasing flexibility. How can we continue to change at the speed of community – not just in times of emergency, but always?”

– Stephanie Boarden, *Advancing Inclusive & Equitable Learning Practices in Grantmaking*

For more reflections and a list of action items to support grantmakers' shifting philanthropic culture and practice, visit our [Perspectives blog](#) ↗

WHAT WE OFFERED IN 2021

As a home for grantmakers, we continued to provide our community with the resources and relationships needed to support thriving nonprofits and communities. Here is a snapshot of the convenings, networks and publications we offered in 2021:

- ◆ **2020-2021 Change Leaders in Philanthropy Fellowship**
- ◆ **2021 Learning Conference**
- ◆ **CEO and Senior Leader cohort series**
- ◆ **GEOList**
- ◆ **Peer Network Communities: Strategic Learners Network, Capacity-Building Champions**
- ◆ **Remote Learning Series**
- ◆ ***Shifting the Evaluation Paradigm: The Equitable Evaluation Framework™***
- ◆ ***Reimagining Capacity Building: Navigating Culture, Systems & Power***
- ◆ **Virtual peer learning webinars, member calls and workshops**

“

My CLIPF experience elevated my leadership and continues to provide me with a supportive community, reflective learning and inspiration.”

– Rebecca Cisek, Bainum Family Foundation

Walking Our Talk: Steps Toward External & Internal *Equity*

In 2021, we published *Reimagining Capacity Building: Navigating Culture, Systems & Power.* While capacity building is a critical part of our work as grantmakers, traditional models of capacity building tend not to account for culture, systems and power in their design.

The limitations of models that do not consider dynamics of power and issues of equity have never been more apparent than they are now. At the time of the publication launch, we navigated a resurgence of a global pandemic and bearing witness to continued, large-scale protests for racial justice, both of which brought renewed attention to the deep and persistent racial inequities that exist in society writ large – including within philanthropic institutions.

During those shifts, our community sought new insights into how institutions are participating in systems that perpetuate inequity, engaging in deep dialogue and reflection and adopting more equitable and transformative philanthropic practices. The capacity building publication was a particularly powerful case study of how racial inequities show up in our practices and how grantmakers can take intentional steps to mitigate those inequities.

With the proper capacity, resources and support in place, everyone has a role in shaping philanthropic culture and effectiveness.

While instilling racial equity within capacity building practice is a critical strategy for advancing systems change, the *how* is not always clear.

This publication, like much of GEO's work, offered practitioners clarity on how to shape institutional practices through actionable steps to the full range of capacity building efforts – everything from financial management to human resources to leadership development.

At GEO, we believe that change is best catalyzed through collective – and individual – action. With the proper capacity, resources and support in place, everyone has a role in shaping philanthropic culture and effectiveness, regardless of tenure, background or identity. That is why we prioritized directing this examination inward, as we continue to grapple with ways to apply equity throughout our work, including internally to our organization.

In the spirit of walking our talk, and with the help of results from an equity assessment and employee engagement survey, our operations team invested time in 2021 to actively listen, review and test equity-based policies that could better support GEO staff. While we leaned on our existing practices and competitive benefits, it was important for us to speak to staff members across the organization to find and meet their needs, rather than employ our own assumptions. Those findings led us to make a few changes to better support our stakeholders internally and externally. For example, we implemented a revised professional development fund policy with variable amounts based on level within the organization. Additionally, we redesigned our year-end raise process using an equity lens and targeted higher percentages of annual raises for bands with lower compensation ranges. Finally, regarding our hiring processes, we enacted a policy where we compensate candidates for participating in interview-related activities to honor their time and contributions to the process.

While these are a snapshot of the larger changes GEO made, the key takeaway was that “listening to what the team needed was a critical component of ensuring they can show up every day and have access to resources that allow them to thrive,” said Kelly Wise, GEO's director of people and culture.



◆ Photography Credit:
Carolina Kroon

Answering the *How* of Community-Driven Philanthropy

2021 was a period of uncertainty and growth in many ways, but especially in examining existing grantmaking practices, shifting approaches to increase grantee inclusion and a greater desire to be in deeper partnership with nonprofits and communities.

While many within our community identified *what* needed to shift, they were less clear about *how* to go about doing so.

♥ Photography Credit:
Carolina Kroon

To support the sector and our members navigating these crucial questions, GEO continued to provide resources, convenings and peer communities to help grantmakers answer the *how* of community-driven and equity-centered philanthropy. Through the Remote Learning Series – GEO’s “crash course” of our smarter grantmaking practices – participants were provided the forum to grapple with ways that a community-led, participatory lens could be applied to day-to-day grantmaking.

“

We are already in the process of shifting power, and this *program reinforced and provided more tools to do just that.*”

- Program Participant



But the series was not just about offering participants the chance to surface some deeply rooted challenges.

Core to GEO's belief in collaboration as a means of facilitating change, the series also was an opportunity for participants to brainstorm ideas to address pain points alongside colleagues. These fruitful conversations resulted in the development of new strategies that participants could implement to advance community-driven philanthropy, such as the following.

Stakeholder-created Grant Funds

Some participants pointed to specific funds that could be initiated and developed by community members and grantees. These funds were dedicated to a community-identified purpose, and the decision-making table was headed by nonprofits and community members with lived experience in the program area they are funding.

Focus Groups

The grantee experience is not monolithic, and perceptions can vary about a foundation or a foundation grantmaking process. Focus groups were identified to test assumptions, gather input and allow for an external facilitator (independent of the foundation) to gather authentic feedback from community members and grantees.

“

The connections to peers in the professional philanthropic community that this program provides by design are already the biggest help because *I don't get this anywhere else.*”

- Program Participant

Community Advisory Groups

To address the issue of maintaining a steady form of feedback throughout the grantmaking process (concept to evaluation), practitioners identified community advisory groups as a means of encouraging community members and nonprofits to advise grantmakers on several stages and components of grants.



◆ Photography Credit: Carolina Kroon

Volunteers & Committees

2021 Learning Conference Host Committee

Kara Inae Carlisle, McKnight Foundation (co-chair)
 Anita Patel, Bush Foundation (co-chair)
 Torrie Allen, Arts Midwest
 JoAnn Birkholz, Medica Foundation
 Tawanna Black, Center for Economic Inclusion
 Susie Brown, Minnesota Council on Foundations
 Imee Cambroner, The Minneapolis Foundation
 Amelia Corl, GHR Foundation
 Allison Corrado, Blue Cross and Blue Shield of Minnesota Foundation
 Maria De La Cruz, Headwaters Foundation for Justice
 Aretha Green-Rupert, Carlson Family Foundation
 Jennifer Higgins, Target Foundation
 Allie Larson, 3Mgives
 Pamela Larson Nippolt, Margaret A. Cargill Philanthropies
 Stephannie Lewis, Greater Twin Cities United Way
 Mark Lindberg, Margaret A. Cargill Philanthropies
 Denise Mayotte, The Sheltering Arms Foundation
 Ann Naithani, Northwest Area Foundation
 Gloria Perez, Women's Foundation of Minnesota
 Jon Pratt, Minnesota Council of Nonprofits
 R.T. Rybak, The Minneapolis Foundation
 Tony Sertich, Northland Foundation
 Chanda Smith Baker, The Minneapolis Foundation
 Nadege Souvenir, Saint Paul & Minnesota Foundation
 Erik Torch, Northland Foundation

2021 Learning Conference Planning Committee

Chris Chin, Robins Foundation (co-chair)
 Huilan Krenn, Ph.D., W.K. Kellogg Foundation (co-chair)
 Fatima Angeles, The California Wellness Foundation
 Hilary Cherner, Arabella Advisors
 Suzanne Koeplinger, The Minneapolis Foundation
 David Lewis, Winthrop Rockefeller Foundation
 Fontane Lo, Blue Shield of California Foundation
 Dwayne Marshall, Community Foundation of Greater Chattanooga
 Paul Masiarchin, Minnesota Council on Foundations
 Jessica Dalesandro Mindnich, Ph.D., Ewing Marion Kauffman Foundation
 Amoretta Morris, Borealis Philanthropy
 Becky Pastner, St. David's Foundation
 Melissa Sines, formerly of PEAK Grantmaking

Supporters

GEO would like to extend a special thank you to the foundations that supported us in 2021 with major grant support.

Angell Foundation
Barr Foundation
Blue Shield of California Foundation
Borealis Philanthropy
The California Wellness Foundation
Charles and Lynn Schusterman Family Philanthropies
Conrad N. Hilton Foundation
The David and Lucile Packard Foundation
Evelyn & Walter Haas, Jr. Fund
Ewing Marion Kauffman Foundation
Ford Foundation
Fund for Shared Insight
John D. and Catherine T. MacArthur Foundation
Robert Wood Johnson Foundation
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Weingart Foundation
Wellspring Philanthropic Fund
The William and Flora Hewlett Foundation
W.K. Kellogg Foundation

2021 Learning Conference Supporters

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Delta Dental of Minnesota Foundation
GHR Foundation
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James Irvine Foundation
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Margaret A. Cargill Philanthropies
McKnight Foundation
Medica Foundation
Northland Foundation
Open Society Foundations
Saint Paul & Minnesota Foundation
St. David's Foundation
Target Foundation
The California Wellness Foundation
Winthrop Rockefeller Foundation
UpMetrics
Walton Family Foundation
Women's Foundation of Minnesota

Financial Information

STATEMENT OF FINANCIAL POSITION (UNAUDITED) FOR THE YEAR ENDED DECEMBER 31, 2021

Net Assets – Unrestricted	8,953,545
Assets With Donor Restrictions	2,859,665
Total Assets	11,813,210
Total Liabilities	944,937
Selected Balances	
Cash	8,883,658
Investments	1,535,661

STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS (UNAUDITED) FOR THE YEAR ENDED DECEMBER 31, 2021

Revenue	Revenue Without Restrictions	Revenue With Restrictions	Total
Membership Contributions	2,095,876	204,659	2,300,535
Grants & Contributions	5,031,916	1,939,453	6,971,369
Conference Sponsorship	-	340,000	340,000
Earned Revenue: Conference Registration, Peer Learning, Speaking Engagements	271,970	-	271,970
Other	13,215	-	13,215
Net Assets Released From Restrictions	2,051,861	(2,051,861)	-
Total Revenue & Support Expenses	9,464,838	432,251	9,897,089
Conferences	463,323	-	463,323
Communications	282,034	-	282,034
Member Programs	1,179,420	-	1,179,420
Research & Learning	735,301	-	735,301
Core Infrastructure & Support	1,691,311	-	1,691,311
Fundraising	231,169	-	231,169
Total Expenses	4,582,558		4,582,558
Change in Net Assets	4,882,280	432,251	5,314,531
Net Assets, Beginning of the Period	4,071,265	2,427,414	6,498,678
Net Assets, Ending of the Period	8,953,545	2,859,665	11,813,209

2021 Board of Directors

Lisa Eisen

Charles and Lynn Schusterman Family
Philanthropies
(2017-2021)

Neel Hajra

Michigan Health Endowment Fund
(2020-Current)

Daniel Lee

Formerly of Levi Strauss Foundation
(2018-2021)

Philip Li

Robert Sterling Clark Foundation
(2018-Current, Treasurer 2019-2022)

Kelly D. Nowlin

Surdna Foundation
(2016-2022)

Anita Patel

Bush Foundation
(2021-Current)

Carrie Pickett-Erway

Kalamazoo Community Foundation
(2017-Current)

Dennis Quirin

Raikes Foundation
(2021-Current)

Kathy Reich

Ford Foundation
(2012-2021, Vice Chair 2017-2019, Chair
2019-2021)

Andrea Hernandez Rodriguez

Conflict Transformation Fund
(2017-2022, Governance Committee Chair
2020-2022)

Brenda Solorzano

Headwaters Foundation for Justice
(2019-Current)

Denise St. Omer

Greater Kansas City Community Foundation
(2019-Current, Vice Chair 2021-Current)

Deborah Aubert Thomas

Philanthropy Ohio
(2020-Current)

Starsky Wilson

Formerly of Deaconess Foundation
(2015-2021)

Hanh Cao Yu

The California Endowment
(2018-Current, Vice Chair 2019-2021, Chair
2021-Current)



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EFFECTIVE ORGANIZATIONS