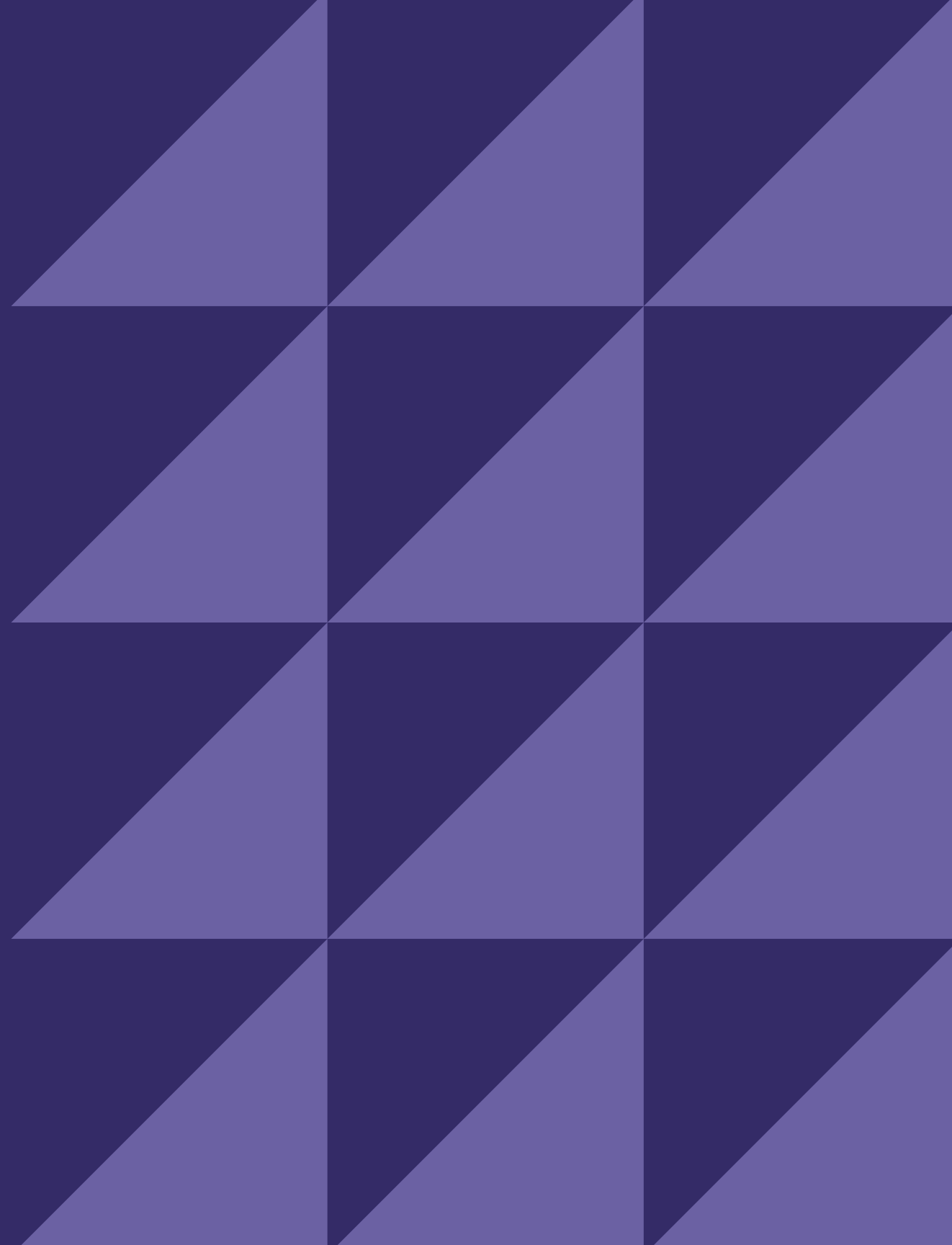




[www.geofunders.org](http://www.geofunders.org)

2022-2023

# Annual Report



# About Us

GEO is a community of funders committed to transforming philanthropic culture and practice by connecting members to the resources and relationships needed to support thriving nonprofits and communities.

We envision courageous grantmakers working in service of nonprofits and communities to create a just, connected and inclusive society where we can all thrive.

That's the power of the GEO community. With more than 6,000 grantmakers across the globe, we work together to lift up the grantmaking practices that matter most to nonprofits and that truly improve philanthropy.

## Values

In 2023, GEO refreshed our organizational values through a collaborative process.



**Love:** We reclaim philanthropy as expressing love for all humanity by building a culture that centers voices and experiences that have traditionally been exploited, invisibilized and othered. This reclamation of philanthropic culture is grounded in care, self-expression and celebration.



**Racial Equity in Practice:** We see the construction of race as central to all social issues and actively strive for a just and equitable future. This work is intersectional, data-informed and measurable and compels us to consistently put our words into practice.



**Community-Centered Collaboration:** We honor each other by building relationships, learning in partnership and resisting individualism. Working in community reminds us that our ultimate success or failure is collective.



**Trust and Accountability:** We seek to be in trusting relationships and know that accountability is necessary for us to get there. We commit to cultivating both by leveraging our power and reckoning with philanthropy's historical roots and present reality so that together we can pursue connection and wholeness.

# What does a thriving community look like to you?



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# Welcome Letter

## Dear Friends and Colleagues,

Across 2022 and 2023, the GEO community moved closer to realizing our shared vision of courageous grantmakers working in service of nonprofits and communities to create a just, connected and inclusive society where we can all thrive. These shifts in thought and practice – which do not happen overnight – require an ecosystem mindset, demand a commitment to cultivating collective genius and involve constant reimagining of the transformation that is *possible* for the philanthropic sector, not just what is practical or efficient.

These shifts were apparent at **GEO's 2022 National Conference**, our first in-person gathering since the pandemic. As communities face threatening conditions, it is critical to acknowledge that philanthropy is not always collectively committed to social progress. Yet, as we listened to workshops and engaged with practitioners from across the sector, it was clear that more grantmakers are challenging traditional beliefs about what is possible – a position of courage that is long overdue for our field. The GEO community is aware of the practices that have historically held back communities and, in forums such as GEO's National Conference, is coming together to establish a common understanding of our individual experiences.

2023 marked 25 years of our commitment to foundational practices of equitable grantmaking. While we continued the work of providing supportive and challenging spaces for grantmakers to grapple with pressing issues, we also made time for reflection and celebration. We went deep in our strategic planning process, which brought the benefit of even deeper connections with our members and broader community.

Over the last two years, the GEO staff helped to facilitate the safe return of in-person connections. GEO re-entered the field to deepen new and old relationships that, for too long, had been relegated to our computer screens. In Seattle, Washington, we reflected on how philanthropy-serving organizations had adapted during the pandemic to advance philanthropic culture and practice. In Grand Rapids, Michigan, we discussed how grantmakers can center communities in capacity-building efforts. From Arizona to Florida, Iowa to Indiana (and, of course, in the virtual panels and sessions that continue to expand access to all participants), we have tremendous gratitude for the opportunities to reconnect peers and host conversations on the issues that matter most for the GEO community.

In this report, you will see many examples that illustrate 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 committed their leadership through these two years. Though there is more work to be done, the prospect for an invigorated ecosystem for change is bright!

**Sincerely,**



**Marcus Walton**  
President & CEO, GEO  
Executive Director,  
KC People's Fund



**Denise St. Omer**  
Chair, GEO Board of Directors  
Vice President, Grantmaking,  
The Bush Foundation



**Anita Patel**  
Vice Chair, GEO Board  
of Directors

# GEO in Action

Throughout 2022 and 2023, GEO was busy providing members with many ways to connect and collaborate with those on the same journey to improve. Over the course of two years, we engaged thousands of grantmakers virtually and in person. Here are some highlights:

- **Peer Communities and Cohorts:**

- **Strategic Learners Network** – **30+** GEO members connected with peers to discuss learning and evaluation practices in philanthropy through quarterly calls, a Slack space and a listserv.
- **Equitable Operations** – **50+** practitioners in operational functions engaged to explore pathways for creating and supporting people-centered culture.
- **Capacity-Building Champions** – **20+** people engaged in this vibrant learning community of grantmakers who embrace grantee-centered capacity building as a strategy for building nonprofit resilience.
- **Race Equity Culture Fellowship** – **13** racial equity and DEI leaders in grantmaking organizations joined this peer cohort program hosted in partnership with Equity In The Center®.
- **Change Leaders in Philanthropy Fellowship** – CLIPF continued to support executives as they lead organizational change and create conditions that lead to nonprofit success and sustainability. Across

2022 and 2023, CLIPF welcomed **41** fellows. This makes a total of **119** alumni who are part of the Change Leaders Community peer group.

- **CEO and senior leadership convenings** – **76** organizational leaders came together to discuss shared experiences, innovative approaches and collective wisdom to effectively address systemic inequalities and drive impactful change within their organizations and the broader community.
- **Webinars and Partner Calls:** GEO worked with our members to host **16** webinars and partner calls to explore emerging grantmaking topics and approaches, combining in-depth information and practical examples with thought-provoking discussions.
- **Remote Learning Series:** GEO offered **3** Remote Learning Series, which provided space for members to learn with seasoned practitioners within the GEO community across multiple sessions. Topics included community-driven philanthropy and the learning mindset.
- **New-Member Orientations:** We held quarterly new-member orientations each year for a total of **six** opportunities for new members to connect and provide insight into how GEO can best serve their desired impact.
- **GEOList:** Each year led to **50** questions related to collective discussion, feedback and insights of member-led topics about equitable culture and practice in real time.



## Celebrating 25 Years of Exploring Effective Grantmaking Practices

In 2023, GEO celebrated our 25th anniversary. We honored our history by collecting stories of GEO's impact, and we looked toward the future by continuing to deepen our relationships with members and partners. Over the past 25 years, contributors to the GEO community remained steadfast in our commitment to exploring the principles and practices that **drive philanthropic effectiveness**. GEO is honored to partner with a growing community of grantmakers who are having critical conversations and facilitating changes needed to foster the most meaningful conditions for our partners to thrive. Our collective interpretations of what "effectiveness" entails are always evolving, and it is essential that our shared vision for effectiveness evolves with our practices.

Thank you to all who have supported the GEO community with your investments of time, energy and financial resources. We look forward to the next 25 years of collective efforts in creating a just, inclusive and connected society!

"When I think about how GEO relates to the evolution of my practice ... I think about the fellow travelers, the folks that I have met at GEO, not for transactional relationships, not for the next contracts, but those people who really see me and have created the space for me to grow my soul and to become more me."

**EFRAÍN GUTIÉRREZ, CO-FOUNDER, FREEDOM DREAMS IN PHILANTHROPY**



"Big milestone anniversaries like the 25th give an opportunity to reflect on what being a part of this community has meant to you and your work and what we think 'effective philanthropy' is. I started in this wild world of philanthropy 15 years ago, and I very quickly found in GEO an amazing wealth of resources, information and people with common-sense knowledge and ideas about what philanthropy could and should be. And I found a community that I have continued to learn with and from for 15 years."

**HANH LE, CO-CEO, IF, A FOUNDATION FOR RADICAL POSSIBILITY**

"After nearly a decade doing grant-funded work in the nonprofit sector, I joined my first foundation in 2010. Although we were a well-meaning foundation, I quickly observed many of the same low-impact grantmaking habits that frustrated me as a grantee. That's when I discovered GEO. It was a revelation to find a national peer group who felt like I did and were doing something about it. GEO publications became a critical source of credibility for my successful change-making efforts at my foundation. GEO's conferences gave me access to like-minded people, and its executive retreat was one of the best professional development experiences of my life. I now serve proudly on GEO's board with the knowledge that we're a critical change maker in the foundation field. We've accomplished so much in the past quarter century, and I'm excited about upping GEO's impact for the next 25 years."

**NEEL HAJRA, CEO, MICHIGAN HEALTH ENDOWMENT FUND**

## GEO Highlights

### 2022 and 2023 GEO Conferences: Moving Forward Together

Hosted in partnership with our regional partner, Forefront, GEO's 2022 National Conference marked the first time since the start of the COVID-19 pandemic that the GEO community gathered in person. It was a collective moment of celebratory reunion – for three days, 600 participants listened and collaborated to fill their cups and encourage each other to move forward, the ultimate expression of GEO's charge to transform philanthropic culture and practice *in community* with others.

“The powerful and leaderful presence of speakers ... set a tone and culture of equity-in-action, a way of being together that was truly powerful. We can do this. We can make this the world that we want and need.”

#### CONFERENCE PARTICIPANT

The 2022 National Conference also served as a restatement of GEO's commitment to racial equity. Conference plenaries, workshops and short talks explored practical ways that grantmakers can support communities deeply affected by systems of oppression. The National Conference moved attendees closer to addressing the historic, emerging and dynamic forces at work that suppress individual and communal avenues to self-actualization.

GEO conferences offer grantmakers the opportunity to meet and build relationships with peers across different disciplines, roles and experiences. Read a GEO member's perspective on why conferences are a form of collective capacity building.

[www.geofunders.org/about-us/perspectives/196](http://www.geofunders.org/about-us/perspectives/196)

Hosted in partnership with Philanthropy DMV (formerly Washington Regional Association of Grantmakers), our 2023 Learning Conference centered on the theme of courageous unlearning. The conference offered a range of perspectives and new ideas to go beyond the basics and support grantmakers in more intentional learning practices – both internal and external to their organizations – through a mix of session formats, speakers from inside and outside of philanthropy, and a virtual livestream component to engage conference participants both in person and virtually.



Across both conferences, speakers reminded us that the complexities of the human experience require us to expand our perspectives as well as our approaches to developing solutions in partnership with those most impacted by issues. Others offered concrete practices for funding place-based systems change and building power for people representing the global diaspora. As a field, we are aware of the practices that have historically held back communities, and, at GEO's 2022 National Conference and at our 2023 Learning Conference, the GEO community came together to establish a common understanding of our individual experiences. Through this process, we opened endless possibilities for nurturing and sustaining community, honoring difference and reckoning with power in ways that allow all to thrive.

Want to learn more? Read our blog that explores how GEO's conference team explores equitable and accessible conference planning.

[www.geofunders.org/about-us/perspectives/202](http://www.geofunders.org/about-us/perspectives/202)

## GEO Highlights

### GEO in the Field

After a long break from in-person engagements due to COVID, in 2022 GEO had the opportunity to safely get back into the field, leading discussions and facilitating workshops on a range of grantmaking approaches that transform philanthropic culture and practice.

At GEO, we believe that no one organization has the resources to address the complex issues facing our communities – our success as grantmakers is linked to the strength of our connections with peers and partners. By increasing our field presence, we are learning more about what works, drawing from what our members have learned about supporting thriving nonprofits and sharing that knowledge with the broader field. Throughout 2022, we were able to participate in:



13

conferences



18

learning sessions  
and workshops



4

organizational  
meetings

In November 2022, we also hosted an in-person community reception in Washington, D.C. Over 50 grantmakers and other practitioners from across the region gathered for an evening of intentional relationship building as well as the opportunity to meet (and reconnect) with peers.



Understanding the strength of leveraging our collective networks, we continued deeply collaborating with partners in different regions. Throughout 2023, we were able to contribute to:



15

conferences



9

learning sessions  
and workshops



6

organizational  
meetings





## GEO Resources

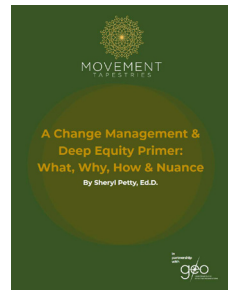
From publications to toolkits, GEO's resources highlight concrete experiences and practices that help grantmakers turn knowledge into action. 2022 and 2023 were an opportunity for GEO to partner and participate in the development of thoughtful, peer-reviewed publications to support equitable, sustainable and meaningful work.



### **CENTERING EQUITY THROUGH FLEXIBLE, RELIABLE FUNDING (2022)**

This resource equips grantmakers with the necessary data, tools and insights to adopt an equity-centered approach to flexible, reliable funding by providing unrestricted, multiyear grants to nonprofits and communities. The publication showcases real-world examples to

show the benefits of this approach to the philanthropic sector. By offering updated analysis and case studies, we aim to support the sector in becoming more equitable and community-driven.



### **A CHANGE MANAGEMENT AND DEEP EQUITY PRIMER: THE WHAT, WHY, HOW & NUANCE (2023), BY SHERYL PETTY AT MOVEMENT TAPESTRIES**

Co-released with Sheryl Petty at Movement Tapestries, this publication introduces dynamic practice leaders as well as an emerging body of work that promises to improve our effectiveness

as grantmakers, change agents, managers and organizational leaders. Organizations embarking on equity transformation processes often grapple with questions about the work they are engaging in and where they aspire to land as it relates to advancing change. These common questions can present moments of tension or stuckness, for organizations, staff, boards and equity practitioners, whether in identifying the greatest power levers or unaddressed challenges, or in navigating fear or misalignment that can impede larger transformation journeys. Through this publication, Petty supports systems to unstick and deepen their ability to advance and embody Deep Equity.



# Committees and Volunteers

## 2022 National Conference Committees

### NATIONAL CONFERENCE PROGRAM COMMITTEE

**Jamaica Maxwell**, The David and Lucile Packard Foundation (co-chair)

**Leticia Peguero**, Philanthropic Consultant and Coach (co-chair)

**Lisa May Simpson**, Forefront (conference partner)

**Andrea Anderson**, PhD, The Skillman Foundation

**Cher-Wen DeWitt**, Segal Family Foundation

**Jessyca Dudley**, Chicago African Americans in Philanthropy

**Rev. Mary “Kaki” Friskics-Warren**, Dan and Margaret Maddox Fund

**Carmen Garcia**, John D. and Catherine T. MacArthur Foundation

**Jonathan Jayes-Green**, Marguerite Casey Foundation

**Jackie Williams Kaye**, Wellspring Philanthropic Fund

**Michelle McMurray**, MSW, The Pittsburgh Foundation

**Ryan Rodriguez**, Community Foundation for Greater Atlanta

**Jillian Rosen**, Ann Arbor Area Community Foundation

**Dr. Janine Saunders**, The California Endowment

**Jamie N. Schenker**, The California Wellness Foundation

**Dr. Shao-Chee Sim**, Episcopal Health Foundation

**Isabel Sousa**, Edward W. Hazen Foundation

### NATIONAL CONFERENCE HOST COMMITTEE

**John Palfrey**, John D. and Catherine T. MacArthur Foundation (co-chair)

**Heather Parish**, The Albert Pick, Jr. Fund (co-chair)

**Monique Brunson Jones**, Forefront (conference partner)

**Kalia Abiade**, Pillars Fund

**Gayla Brockman**, Michael Reese Health Trust

**Sharon Bush**, Grand Victoria Foundation

**Gillian Darlow**, Polk Bros. Foundation

**Felicia Davis**, Chicago Foundation for Women

**Greg DiDomenico**, Community Memorial Foundation

**Liz Dozier**, Chicago Beyond

**David Farren**, Gaylord and Dorothy Donnelley Foundation

**Helene Gayle**, The Chicago Community Trust

**Heather Higgins Alderman**, Illinois Children’s Healthcare Foundation

**Evan Hochberg**, Crown Family Philanthropies

**Mae Hong**, Rockefeller Philanthropy Advisors

**Dinaz Mansuri**, The Mayer and Morris Kaplan Family Foundation

**Cindy Moelis**, Pritzker Traubert Foundation

**Michelle Morales**, Woods Fund Chicago

**ángela munguía**, AMPT: Advancing Nonprofits

**Mary O’Donnell**, RRF Foundation for Aging

**Maria Pesqueira**, Healthy Communities Foundation

**Toya Randall**, Casey Family Programs

**Darren Reisberg**, Joyce Foundation

**Kashif Shaikh**, Pillars Fund

**Unmi Song**, Lloyd A. Fry Foundation

**Dimitra Tasiouras**, Circle of Service Foundation

**Christy Uchida**, The Brinson Foundation



## Committees and Volunteers

### 2023 Learning Conference Committees

#### 2023 LEARNING CONFERENCE PROGRAM COMMITTEE

**Fontane Lo**, Blue Shield of California Foundation (chair)

**Temí Bennett**, iF, A Foundation for Radical Possibility

**Anna Cruz**, The Kresge Foundation

**Stacey Easterling**, Virginia G. Piper Charitable Trust

**Lorrie Fair Allen**, Charlize Theron Africa Outreach Project

**Efraín Gutiérrez**, Center for Evaluation Innovation

**Karris Jackson**, POISE Foundation

**Robert Medina**, Sobrato Philanthropies

**Katrina Mitchell**, United Way of Greater Atlanta

**Mary Mulcahy**, The Morris and Gwendolyn Cafritz Foundation

**Rory Neuner**, Barr Foundation

**Trish Adobea Tchume**, Robert Sterling Clark Foundation

**Brandi Yee**, ACT for Alexandria

#### 2023 LEARNING CONFERENCE HOST COMMITTEE

**Candice Jones**, Public Welfare Foundation (co-chair)

**Hanh Le**, iF, A Foundation for Radical Possibility (co-chair)

**Ruth LaToison Ifill**, Washington Regional Association of Grantmakers (conference partner)

**George Askew**, Eugene and Agnes E. Meyer Foundation

**Tamira Benitez**, Diverse City Fund

**Kimberlin Butler**, Mathematica

**Rebecca Cisek**, Bainum Family Foundation

**Rick Cruz**, Arabella Advisors

**Caitlin Duffy**, Amalgamated Bank/Foundation

**Aracelis Gray**, DC Bar Foundation

**Rella Kaplowitz**, Charles and Lynn Schusterman Family Philanthropies

**Jackie Kaye**, Wellspring Philanthropic Fund

**Mardell Moffett**, The Morris and Gwendolyn Cafritz Foundation

**alicia sanchez gill**, Emergent Fund

**Tonia Wellons**, Greater Washington Community Foundation

**Nat Williams**, Hill-Snowdon Foundation

**Leslie Wingender**, Humanity United

### 2022 and 2023 Funders

GEO is grateful to the following organizations that supported our work in 2022 and 2023:

Angell Foundation

Barr Foundation

Blue Shield of California Foundation

Borealis Philanthropy

Casey Family Programs

Charles and Lynn Schusterman Family Philanthropies

Clinton School Center on Community Philanthropy

Conrad N. Hilton Foundation

The David and Lucile Packard Foundation

Evelyn and Walter Haas, Jr. Fund

Ewing Marion Kauffman Foundation

Ford Foundation

Fund for Shared Insight

HopeLab

Humanity United

John D. and Catherine T. MacArthur Foundation

Kresge Foundation

Omidyar Network

The Priddy Foundation

Raikes Foundation

Robert Wood Johnson Foundation

Stupski Foundation

Surdna Foundation

Weingart Foundation

Wellspring Philanthropic Fund

William and Flora Hewlett Foundation

W. K. Kellogg Foundation





## 2022 and 2023 Conference Supporters

The Albert Pick, Jr. Fund  
Amalgamated Bank  
The Annie E. Casey Foundation  
AMPT: Advancing Nonprofits  
Anonymous  
Arabella Advisors  
Ascendium Education Group  
Bainum Family Foundation  
Blue Shield of California Foundation  
The Brinson Foundation  
Board.Dev  
Bush Foundation  
California Healthcare Foundation  
CareQuest Institute for Oral Health  
Casey Family Programs  
Center for Creative Leadership  
Charles and Lynn Schusterman Family Philanthropies  
Chicago Beyond  
The Chicago Community Trust  
Chicago Foundation for Women  
Community IT Innovators  
Community Memorial Foundation  
Crown Family Philanthropies

DC Bar Foundation  
The David and Lucile Packard Foundation  
Diverse City Fund  
Emergent Fund  
Eugene and Agnes E. Meyer Foundation  
Fidelity Charitable  
Gaylord and Dorothy Donnelley Foundation  
Grand Victoria Foundation  
Greater Washington Community Foundation  
Healthy Communities Foundation  
Hill-Snowdon Foundation  
Horning Family Foundation  
iF, A Foundation for Radical Possibility  
Illinois Children's Healthcare Foundation  
John D. and Catherine T. MacArthur Foundation  
The Joyce Foundation  
The Kresge Foundation  
Lloyd A. Fry Foundation  
Lumina Foundation  
Marguerite Casey Foundation  
The Mayer & Morris Kaplan Family Foundation  
Michael Reese Health Trust  
The Morris & Gwendolyn Cafritz Foundation  
Pillars Fund  
Polk Bros. Foundation  
Pritzker Traubert Foundation

Public Welfare Foundation  
Resilia  
Rockefeller Philanthropy Advisors  
RRF Foundation for Aging  
Steans Family Foundation  
United Way of Greater Atlanta  
Walton Family Foundation  
Wellspring Philanthropic Fund  
Woods Fund Chicago

# Financial Reports

GEO's financial information for 2022 and 2023 can be found [here](#).



# GEO Board Members

## 2022 Board of Directors

CHAIR

**Hanh Cao Yu (2018-2024)**

Chief Learning Officer, The California Endowment

VICE CHAIR

**Denise St. Omer (2019-Current)**

Vice President of Grantmaking and Inclusion Initiatives,  
Greater Kansas City Community Foundation

TREASURER/SECRETARY

**Neel Hajra (2020-Current)**

CEO, Michigan Health Endowment Fund

GOVERNANCE COMMITTEE CHAIR

**Brenda Solórzano (2019-Current)**

CEO, Headwaters Foundation

**Deborah Aubert Thomas (2020-Current)**

President and CEO, Philanthropy Ohio

**Andrea Hernandez Rodriguez (2017-2022)**

Partnerships, Conflict Transformation Fund

**Philip Li (2018-2024)**

President and CEO, Robert Sterling Clark Foundation

**Kelly D. Nowlin (2016-2022)**

Trustee, Surdna Foundation

**Anita Patel (2021-Current)**

Vice President, Grantmaking, The Bush Foundation

**Carrie Pickett-Erway (2017-2022)**

(Former) President and CEO of Kalamazoo Community  
Foundation

**Dennis Quirin (2021-Current)**

Executive Director, Raikes Foundation

**Marcus Walton (ex officio)**

President and CEO, Grantmakers for Effective  
Organizations

## 2023 Board of Directors

CHAIR

**Denise St. Omer (2019-Current)**

Executive Director, KC People's Fund

VICE CHAIR

**Anita Patel (2021-Current)**

Vice President, Grantmaking, The Bush Foundation

TREASURER/SECRETARY

**Neel Hajra (2020-Current)**

CEO, Michigan Health Endowment Fund

GOVERNANCE COMMITTEE CHAIR

**Brenda Solórzano (2019-Current)**

CEO, Headwaters Foundation

IMMEDIATE PAST CHAIR

**Hanh Cao Yu (2018-2024)**

(Former) Chief Learning Officer, The California  
Endowment

**Deborah Aubert Thomas (2020-Current)**

President and CEO, Philanthropy Ohio

**Ryan Easterly (2022-Current)**

Executive Director, WITH Foundation

**Regan Gruber Moffitt (2022-Current)**

Vice President of Community Investments,  
St. David's Foundation

**Joanna S. Jackson (2023-Current)**

Interim President and CEO, Weingart Foundation

**Dr. John H. Jackson (2023-Current)**

President and CEO, Schott Foundation

**Philip Li (2018-2024)**

President and CEO, Robert Sterling Clark Foundation

**Dennis Quirin (2021-Current)**

Executive Director, Raikes Foundation

**Dr. Chera Reid (2023-Current)**

Founder, Freedom Dreams in Philanthropy

**Marcus Walton (ex officio)**

President and CEO, Grantmakers for Effective  
Organizations



**Smarter grantmaking.  
Stronger nonprofits.  
Better results.**

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