



Strategic Direction 2024

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Introduction

Grantmakers for Effective Organizations (GEO) is pleased to share our new strategic direction as we continue the long-term work of transforming philanthropic culture and practice so that grantmakers work in service of nonprofits and communities. This new strategy carries forward our unwavering commitment to advancing racial equity, addressing the root causes of injustice, and transforming the philanthropic field. We understand that culture shapes strategy and strategy drives practice. As such, GEO seeks to shape the norms, values and behaviors of philanthropy in order to center philanthropic practice on operationalizing racial equity. Developed with the support of Frontline Solutions, this strategy is the result of deep engagement with the full GEO community.

In 2019, with the appointment of a new CEO, and in 2020, through the refinement of our mission and vision, GEO set an evolutionary course for the organization. We have spent the past several years testing and learning with our community, practicing and living our vision for change. Now, with this new strategic direction, we are taking a monumental step forward. We are mobilizing the GEO community—our members, partners, board, staff and other stakeholders—around an explicit and holistic direction that aligns us with our purpose, our commitment to racial equity and our role within the broader philanthropic ecosystem.

This strategic direction comes on the heels of a global pandemic and mass mobilization for racial justice. Yet in 2024, we find ourselves in a time of division and scapegoating, when efforts to undermine critical race theory and diversity, equity and inclusion programs stand to roll back progress. At this time, funders and individuals seek connections to a community that can support them in standing strong and challenge them to deepen their progress toward the commitments so many grantmakers made in the past several years. Grantmakers have long been challenged to close the gap between their values and their practices, and the resurgent external backlash to racial equity means that individuals and organizations need even more support now. GEO is well positioned for this work as a network with broad reach, a long history of supporting change leaders in philanthropy and a deep commitment to racial equity.

Our racial equity work is focused on closing the measurable and consistent gaps that affect people's ability to thrive based on race and other marginalized aspects of their identities. We can do restorative, healing work that brings us together and responds to the predictable patterns of systemic racism if we prioritize relationships, community experience and the need for deep transformation.

GEO sees our role as advancing intersectional racial equity by facilitating culture and practice change in the philanthropic sector at individual, organizational and system levels. Through awareness building, support for change leaders, institutional organizing and coalition building, GEO aims to shape the culture of philanthropy toward equity. We support grantmakers in developing and deepening their own equity analysis while also taking on the challenge of moving from knowledge to practice. Grantmakers come to GEO to think through and practice

following through on their commitments to the nonprofits and communities they serve. In turn, GEO provides a space for funders to explore more deeply the “why and how” of their racial equity work so that it becomes embedded in institutions long-term. GEO firmly believes that operationalizing intersectional racial equity is the key to supporting thriving nonprofits and communities.

This work cannot be done alone. GEO is honored to complement the work of many sister organizations who are also working to change how our sector operates, including philanthropic networks deeply rooted in communities of color with decades of history in racial equity as well as nonprofit and community leaders who have long spoken out about the need for grantmakers to do better and to shift power. We see ourselves as an essential part of a thriving ecosystem of changemakers. To this ecosystem, we contribute strengths in shifting grantmaker culture and practice among our far-reaching community of members and partners who share a commitment to building a just, connected and inclusive society where all can thrive.

Our strategic direction outlines transformative goals in the interconnected areas of culture, practice, learning and community. These goals underscore the imperative of grounding philanthropic culture in intersectional racial equity, advancing responsive and equitable practices, fostering a learning mindset, and effectively collaborating within a larger ecosystem to advance equity across sectors.

To ensure accountability and track progress, GEO will establish measures aligned with each goal that will name some of the changes we expect to see, such as increased engagement, adoption of equity-centered practices, and building reciprocal relationships across sectors. We will be developing a holistic learning and evaluation plan in 2024 to this end. You will also notice that we are not setting a specific time horizon for the strategic direction. Given the realities of how change happens and how context evolves, we know we will be continuously learning and adapting. We see this strategic direction as including three phases: (1) infrastructure creation and exploration, (2) implementation, practice, learning and refinement and (3) adaptation, emergence and evolution. With this emergent approach, we will assess how well the direction is still serving our community after three years and if a larger pivot would serve us.

As we embark on these next steps in a transformative journey, we invite every member of the GEO community to join us in realizing our vision of a philanthropic sector that serves as a powerful force for equity and positive social change. Together, we will shape a future where thriving nonprofits and communities are not just aspirations but also living realities.



Approach to Strategic Direction

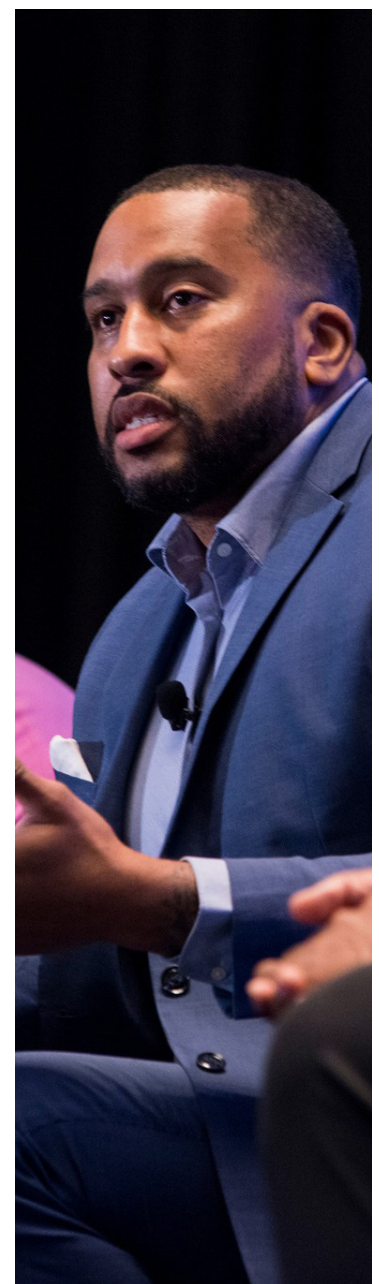
GEO's strategic planning process was a collaborative undertaking launched in early 2022 by the GEO staff and board and led by a cross-functional staff strategy team. This team gathered insights from the field to contribute to the content of the strategy through:

- staff and board interviews with over 70 stakeholders, including grantmakers, nonprofits, consultants and other field leaders to better understand the challenges experienced by grantmakers and nonprofits and how GEO can meaningfully contribute to their work;
- shared learning opportunities and conversations with the staff and board to better understand GEO's contributions to the broader philanthropy support organization ecosystem; and
- an analysis of input shared through listening sessions, programs and other conversations with grantmakers participating in GEO programming.

GEO hired Frontline Solutions in 2022 to build off the work that was completed internally. Frontline Solutions supported the GEO staff and board in the generation and development of (1) “core beliefs” that articulate the change GEO is trying to drive within philanthropy; (2) organizational values that align with GEO's mission and vision; (3) a multiyear strategic direction; and (4) implementation guidance.

Frontline employed a mixed-methods approach throughout the project, including:

- a review of 40 key documents provided by GEO's strategy team, including summaries, meetings, notes, surveys, interviews, blog posts, previous strategic plans, equity analysis reports and board documents;
- facilitation of sessions at GEO board meetings and staff retreats;
- interviews with board members;
- interviews and focus groups with staff members; and
- ongoing engagement with core GEO staff, including strategy sessions with senior staff, the strategy team and the values working groups.



Transforming Philanthropy

GEO's approach to transforming philanthropy is articulated through our vision, mission and values. These elements serve as the foundation for all components of the strategic direction.



Vision

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



Mission

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.



Values

Love: We reclaim philanthropy as expressing love for all of 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.



Core Beliefs

Behind GEO's mission, vision and values are a set of core beliefs we refined as part of this strategic planning process. These core beliefs speak to how GEO sees the field of philanthropy and our role within it. They are an invitation to members of the GEO community, as well as others in philanthropy, to embrace philanthropy as a tool for equity-centered change.

1. Institutional philanthropy needs to do more to contribute to thriving nonprofits and communities.

- a. While institutional philanthropy does create some good, the sector is not designed to facilitate change. Without supportive intervention and accountability, philanthropy alone does not generate conditions where all can thrive.
- b. The structures of institutional philanthropy require reformation and transformation to support a just, connected and inclusive society.

2. Operationalizing intersectional racial equity is the key to transforming philanthropic culture and practice.

- a. Racial equity work is inherently intersectional. Intersecting systems of oppression, such as racism, sexism, transphobia, homophobia, ableism and xenophobia, need to be addressed directly and comprehensively. We specify racial equity because (1) race remains the most durable predictor of outcomes in the U.S. context and (2) we know that people tend to allow race to drop from any analysis if not made explicit.
- b. Operationalizing intersectional racial equity requires prioritizing the removal of barriers to progress for diverse BIPOC communities as a means to thriving for all.
- c. Grantmakers need to understand our own role and impact as well as the broader context within which we are working.



3. Philanthropy's greatest contribution to achieving racial equity is through investing in communities, leaders, nonprofits, businesses and institutions historically and currently harmed by intersecting systems of oppression.

- a. These investments in common take various forms, including grantmaking, equitable investing, endowment management, policy advocacy, equity-centered learning and evaluation, racial healing and reconciliation, narrative shifting, and cultural influences.
- b. The most effective grantmakers simultaneously pursue equitable governance structures and organizational cultures as well as internal policies and practices that align our internal conditions and our external impact.
- c. Knowing is not enough; most grantmakers face a gap between the values and equity principles they espouse and their practices.

4. People within philanthropic institutions have the potential to enact equity-centered change.

- a. Organizations and systems are made up of people. Individual action is required to create system-level change, but it is insufficient to sustain it. History shows us that systemic change requires collective action by multiracial, intersectional communities.
- b. Change happens dynamically over time and occurs at the individual, structural, group and system levels. Change is most impactful when it happens at the system level.
- c. To facilitate sustainable change, grantmakers need to be welcomed and supported in learning environments and continuously challenged to enact equity-centered change.

5. GEO's role is to advance intersectional racial equity by facilitating culture and practice changes in the philanthropic sector at the individual, organizational and system levels.

- a. At the individual level, we raise awareness of equity-centered culture and practice, build community among values-aligned grantmakers and cultivate courageous leadership for those striving to create change. We provide a welcoming and supportive environment for learning and consistently challenge individuals to make equity-centered change.
- b. At the organization level, we engage in institutional organizing and coalition building among funders.
- c. At the system level, we shape the culture of philanthropy to center intersectional racial equity and increase alignment between organizations, people and the resources they need to thrive. We contribute to and partner with a broader movement of organizations and networks advancing change in philanthropy.

Goals

While our mission has always been aspirational, our new goals get us closer to fulfilling that charge. These interconnected, overlapping goals include transforming philanthropic **culture** to be grounded in intersectional racial equity, building and advancing equitable **practice**, fostering equity-centered **learning**, and ensuring the GEO **community** works within the larger change ecosystem. These goals reflect the fact that deep and continuous work grounded in equity is necessary to transform philanthropy and create lasting change. While some grantmakers may not see themselves as changemakers, GEO understands that we all have a vital role to play. That is why our core strategies embrace all willing grantmakers to join in this work regardless of where they are in their equity journeys.





Culture

Goal: Grantmakers in the GEO community develop and deepen an intersectional racial equity analysis, including understanding (1) philanthropy’s historical roots in racism and exploitation, (2) the contemporary realities created and sustained by systems of oppression and (3) the current context of the communities they serve.

Core Strategy: Provide a professional home base that meets grantmakers where they are in their racial equity journeys and offers a variety of entry points to support and challenge them to advance equity.

Actions

To achieve our vision of a just, connected and inclusive society where all can thrive, GEO made a commitment eight years ago to advance racial equity in grantmaking, which has required continuous learning and refinement of our approach. We are now embarking on a new phase of this commitment, moving from serving as a resource to serving as a professional home base where grantmakers can progress along their racial equity journeys.

Through cohorts, role-based convenings, conferences, publications and strategic communications, we will ground grantmakers in a collective understanding of overlapping systems of oppression based on race, class, gender identity, sexual orientation and disability. We will also support grantmakers to understand their work and roles within the larger historical context of wealth generation and philanthropic distribution in the United States and help grantmakers understand how and why to apply an intersectional racial equity analysis in their work. This will enable grantmakers to address past harms, adopt more equitable practices and truly transform philanthropy.

We also benefit from many partners who have long been doing this work. We will continue to amplify the work of our partners and elevate stories and examples of leaders, communities, and funders doing meaningful work to advance racial equity and racial healing.

Our greatest aspiration is to influence the culture of philanthropy by normalizing these practices not as a separate body of work but as central to how philanthropy must operate to support thriving nonprofits and communities.





Practice

Goal: Grantmakers in the GEO community advance responsive and equitable practices such as providing long-term, flexible support to communities harmed by intersecting systems of oppression; centering community and shifting power in their grantmaking, capacity building, learning, and evaluation; and fostering equity in internal operations.

Core Strategy: Support grantmakers in moving from knowledge to action by providing tailored resources, learning and practice opportunities and connections that expand their community of support.

Actions

This is what GEO does. Grantmakers come to us to learn, develop and even co-create practices to help them better partner with nonprofits and communities on complex issues. GEO is not just focused on *what* grantmakers do but also on *how* they get there. As GEO positions itself as a professional home base, we will take this work to the next level by providing more tailored resources, strategic learning opportunities and support for grantmakers in operationalizing equitable practices.

While GEO is already known for our publications and tools, we are now taking the important step of translating our vision for racial equity into resources that facilitate practice and culture changes within institutions and the broader philanthropic sector. We will deliver practical content that details how grantmaking practice can be more effective and impactful when shaped by intersectional racial equity and community-driven practices.

We will also support institutional practice change through direct support services and deeper engagements with individual grantmaking organizations, including trustee and board engagement. In addition, we will support grantmakers in navigating practice change with facilitated peer support through role-based convenings and cohorts.





Learning

Goal: Grantmakers in the GEO community have an equity-centered learning mindset and embrace vulnerability, collective learning and unlearning, and collaboration.

Core Strategy: Create supportive and challenging spaces where grantmakers in the GEO community can learn from communities, nonprofits and each other, and they are equipped to change their mindsets and practices.

Actions

We are proud of GEO's track record of creating supportive and challenging spaces for grantmakers to learn from others who are on the same journey to improve and grow. The GEO community is already filled with people dedicated to effecting change in themselves and their institutions. By taking an equity-centered approach to learning, we are asking grantmakers to be even more vulnerable, challenge themselves and their assumptions, and have grace with others. We are committed to equipping people to do the personal work necessary to listen deeply, learn, change, heal and grow. We will create collective spaces where people can show up with curiosity, vulnerability and openness. In addition, we will support the people responsible for learning within grantmaking organizations to ensure these conversations and transformation can happen institution wide.

As part of this work, we will also elevate stories of grantmakers who have navigated individual, institutional and systemic change. To model this level of vulnerability, GEO is committed to sharing our own organizational learning with the philanthropic sector and the broader public.





Community

Goal: Grantmakers in the GEO community work effectively within a larger ecosystem of people and institutions, advancing equity across sectors.

Core Strategy: Promote possibilities and opportunities for grantmakers to effectively learn and partner with community leaders, nonprofits, government agencies and businesses.

Actions

This goal is perhaps our most ambitious, as it stretches us beyond the circles GEO typically operates in and asks grantmakers to consider how our work fits into a larger ecosystem of change. For change to happen, we have to build coalitions and work toward our shared goals to ensure our solutions meet the scale of our challenges. This is particularly important as political and cultural forces are pushing back against efforts to advance equity. We are stronger when we are working together.

We will support coordination between mission-aligned philanthropy-serving organizations that center racial equity by co-hosting learning spaces, cross-amplifying partner resources, and deepening partnerships that advance strategic goals. We will also strengthen partnerships with nonprofit infrastructure organizations. Lastly, we will move beyond our sector and build deeper relationships and partnerships with institutions advancing equity in the public and private sectors to identify opportunities for mutual support.



GEO Strategic Direction

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.

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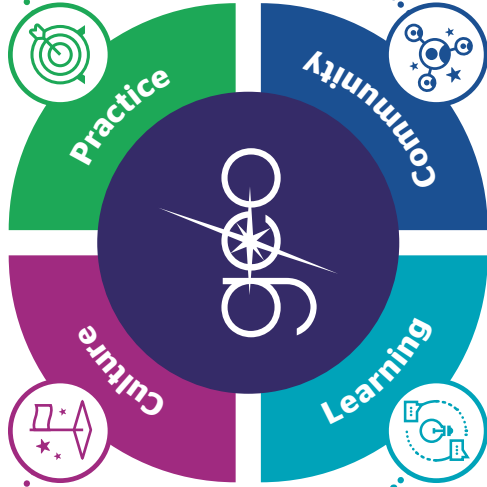
Provide a professional home base that meets grantmakers where they are and offers a variety of entry points to support and challenge them to advance equity.

- Ground organizers in a collective understanding of systems of oppression and grantmakers supply a racial equity analysis
- Support the people foundations to understand their role in the context of racial equity and philanthropic distribution
- Elevate stories and examples of leaders, communities, and practices that are advancing racial equity and healing

Grantmakers in the GEO community have an equity-centered learning mindset and embrace vulnerability, collective learning and unlearning, and collaboration.

Create supportive and challenging spaces where grantmakers in the GEO community can learn from communities, nonprofits and each other, and are equipped to change their mindsets and practices.

- Equip people to listen deeply, learn, change, heal and grow
- Support the people learning within organizations
- Elevate stories of funders who have navigated complex change
- Share GEO's learning with the sector



Grantmakers in the GEO community advance responsive and equitable practices such as providing long-term, flexible support to communities harmed by intersecting systems of oppression; centering community and shifting power in their grantmaking, capacity building, learning, and evaluation; and fostering equity in internal operations.

Support grantmakers in moving from knowledge to action by providing tailored resources, learning and practice opportunities and connections that expand their community of support.

- Detail how grantmaking practice can be more effective when shaped by community and community-led practice
- Support in practice change through direct consultation and design with individual grantmaking organizations
- Support grantmakers in navigating change with tailored peer support

Grantmakers in the GEO community work effectively within a larger ecosystem of people and institutions, advancing equity across sectors.

Promote possibilities and opportunities for grantmakers to effectively learn and partner with community leaders, nonprofits, government agencies and business.

- Co-host learning spaces, cross amplify resources, and partner with mission-aligned philanthropic infrastructure organizations
- Build deeper relationships and partnerships with organizations advancing equity in other sectors

GEO VALUES



LOVE

We reclaim philanthropy as expressing love for all of 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.



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