

Laying the Groundwork for **Change**



TABLE OF CONTENTS

- 04** About Independent Sector
- 05** Message from Our Chair & President
- 07** Highlights & Accomplishments
- 09** Independent Sector by the Numbers
- 10** Financials
- 12** 2022 Board, Committees, & Advisory Groups
- 17** 2022 Contributors
- 18** 2022 Independent Sector Members
- 22** Independent Sector Staff

ABOUT INDEPENDENT SECTOR

Independent Sector is the only national membership organization that brings together a diverse community of changemakers, nonprofits, foundations, and corporations working to strengthen civil society and ensure all people in the United States thrive.

As the vital meeting ground, we advance our mission by fostering a sense of belonging, catalyzing action, and providing policy leadership across the full breadth of the charitable sector. Our organizational strategies are results-centered and racial-equity focused.

We believe the country's charitable nonprofits and foundations should be healthy and equitable, and have a targeted focus on Native, Black, Latinx, Asian, and other communities of color.

OUR STRATEGIC DRIVERS



COMMUNITY BUILDING

We build community among changemakers who work and volunteer in the social sector in order to build trust, bridge divides toward belonging, improve wellness, and create a healthy and racially just society to ensure all people thrive.



SECTOR HEALTH

We create, share knowledge, and research to understand and accelerate the impact of the nonprofit sector. By assessing the health of the nonprofit and philanthropic sector as a whole, we can map out a clearer path toward driving more health and equity in our communities.



PUBLIC POLICY

We advocate for public policies that strengthen nonprofits, foundations, and diverse communities nationwide – and help social sector organizations fulfill missions. We serve as a unified voice and information source on pressing legislative and economic issues in our sector.

MESSAGE FROM OUR CHAIR & PRESIDENT

2022 was a watershed year of reflection, change, and transition – for our nation, for the charitable sector, and for Independent Sector.

Our entire world has shifted since the onslaught of the coronavirus three years ago. Independent Sector supported the charitable sector and sector leaders throughout the pandemic. We made robust, online resources available to bolster organizations' COVID-19 response. We also fought for inclusion in federal provisions important to our sector in the American Rescue Plan Act, as well as Paycheck Protection Program (PPP) relief for organizations that provided essential services to communities nationwide.

The “pandemic part” of COVID-19 has subsided. But our sector and nation continue to wrestle with the loss of more than one million Americans and the devastating personal impact on families and the adverse economic ripples on the communities we serve.

The commitment and resilience of our sector, our members, and volunteers have never been more evident than during the pandemic – with our people often putting their own lives at risk. Our workforce is exhausted, having often put aside their own self-care to help and support others. And our workforce continues to struggle under the weight of our “new normal” by balancing the desire to meet their own personal and family needs, while continuing to serve our nation’s families and communities.

As the third largest private employer and nearly six percent of the country’s GDP, the charitable sector is vital to the nation’s economy and the welfare of those we serve – especially people most marginalized in our society. And as the vital meeting ground of the U.S. charitable sector, Independent Sector plays a key leadership role in lifting up and promoting the well-being and care of the nonprofit workforce.

In 2022, we focused our efforts on building the capacity of sector leaders and organizations through our **Community Building** work; assessing sector trends and data in our **Sector Health** work; and advocating on behalf of our leaders, organizations, and communities through our **Public Policy** efforts.

What we are most proud of in 2022:

- We advanced our “Seat at the Table” initiative, which would create structures like a White House office on the nonprofit sector and an advisory board of nonprofit leaders. Such structures would ensure that nonprofit expertise is “at the table” by implementing mechanisms that leverage the mission, knowledge, and impact of nonprofits to help government and the sector work together more effectively in pursuit of shared goals. While a bipartisan bill in Congress did not pass in 2022, more than 700 organizations across all 50 states endorsed the initiative. And we are pleased to have played a major role in the bipartisan reintroduction of the legislation in 2023 by Representatives Nancy Mace (R-SC) and Betty McCollum (D-MN).
- We launched our inaugural Bridging Fellows program, bringing together 40 emerging leaders from Pittsburgh, Dallas, and Chicago to socialize and embed bridging as a core competency in their organizations and communities to help overcome areas of division.

- We released and disseminated quarterly Health of the U.S. Nonprofit Sector reports, an evolving and growing resource of data, analysis, and recommendations about key areas powering our nation’s more than 1.8 million nonprofits. Our suggested actions to improve the overall health of the sector included calling for timely government data on the nonprofit workforce and a better understanding of workforce disparities, asking Congress to reinstate the Nonitemizer Charitable Deduction to make it more affordable for donors to give, and prioritizing the well-being of the nonprofit workforce.
- We issued our third annual Trust in Civil Society report on survey findings that explored the nuances of trust in American nonprofit and philanthropic organizations. Key findings revealed that while there is room for our nation’s institutions to increase public trust, a majority of respondents continue to believe that nonprofits do what is right for society.
- We maintained and strengthened engagement with 1,500 sector leaders through three virtual Upswell Pop-Ups and through our virtual Upswell Summit to build leaders’ networks, focus on self and community care, and wrestle with what it would take to build a healthy and just nation.

Among our biggest changes in 2022 was the transition of leadership at the top of our organization. After boldly leading Independent Sector for six years, including through the pandemic – certainly among the most trying times for our organization and sector – Daniel J. Cardinali announced he would step down from the position during 2022 to take a sabbatical and ponder the next phase of his work. Following a national search by our Board of Directors for a new leader for the next era of IS, Dr. Akilah Watkins, a national expert on equity, policy, and community development, was named Independent Sector’s next president and CEO – the first Black woman to lead Independent Sector in its 43-year history.

FROM DR. AKILAH WATKINS

“I want to thank our Chair, Fred Blackwell, for allowing me to make a small departure from our first joint Annual Report message to personally say how humbling and gratifying it is to lead Independent Sector in strengthening and enhancing our strategic role as the nexus between civil society and our diverse community of changemakers, nonprofits, foundations, and corporations.

“I am holding space for the renewal of energy for the sector and American civic life, and spending most of my first year at Independent Sector laying the groundwork for this change – but I cannot do it alone. So I am conducting a Listening Tour in 2023 to hear directly from our members, partners, and community leaders about what is working well, what we can do better, and how, together, we can reimagine a sector that executes our missions to advance the nonprofit workforce and our institutions.

“I look forward to your insights and to working in lockstep with our membership to better serve our communities and make real a healthy and equitable future for us all.”

Sincerely,



Fred Blackwell
Chair



Dr. Akilah Watkins
President and CEO

HIGHLIGHTS & ACCOMPLISHMENTS



January 2022

After serving six years as President and CEO of Independent Sector, Daniel J. Cardinali announced he would leave the position in 2022 to take a sabbatical to focus on interrogating philosophical and theological questions that have guided his life and work.

April 2022

- Announced, in collaboration with the University of Maryland’s Do Good Institute, the latest value of a volunteer hour estimated at \$29.95, a 4.9% increase from the previous year. The figure shows the value of contributions made by volunteers to our communities and country.
- Oversaw the bipartisan introduction of “Seat at the Table” legislation, by Reps. Betty McCollum (D-MN) and Fred Upton (R-MI), to create permanent, structural mechanisms to enable the sector to help shape and improve federal policy and to expand opportunities for government to work more effectively with the sector to achieve shared goals.
- Hosted Upswell Pop-Up titled, “Recharge, Refuel, Refocus,” the first of three Pop-Ups held during 2022, which engaged 250 changemakers.



March 2022

- Released the first 2022 Health of the U.S. Nonprofit Sector quarterly review, providing IS recommendations and analysis of recent data on the sector’s economic contribution, charitable giving trends, and characteristics of sector employment.
- IS CEO and President Dan Cardinali represented the sector in testifying before the U.S. Senate Committee on Finance in support of the charitable deduction and other key sector priorities.

June 2022



- Launched “It’s On Us: The Nonprofit Voter Empowerment Project,” a nonpartisan pledge campaign developed in partnership with Nonprofit VOTE to help nonprofits increase voter participation among their staff, grantees, volunteers, and constituents in 2022 and beyond.
- Hosted Upswell Pop-Up titled, “Transforming Society through Bridging,” the second of three Upswell Pop-Ups held during 2022, which engaged 320 changemakers.

May 2022

- Released our third annual Trust in Civil Society survey, in partnership with Edelman Data & Intelligence, which found while there is room for U.S. institutions to increase public trust, a majority of respondents believe nonprofits will still do what is right for society.
- Announced the inaugural 2022 cohort of our Bridging Fellows program – a two-year program, generously supported by Walmart, designed to give Fellows the space, skill-building opportunities, and resources to socialize and embed bridging as a core competency in their organizations and communities.



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September 2022

- Announced Dr. Akilah Watkins – a national expert on equity, policy, and community development – as the next President and CEO of Independent Sector. Dr. Watkins is the first African American to lead IS. She joined the organization in January 2023.
- Hosted Upswell Pop-Up titled, “Transforming Systems Is the Only Way Forward,” the third and final Pop-Up held in 2022, which engaged 390 changemakers.



August 2022

- Launched strategic digital transformation including a new logo, website redesign, and Salesforce implementation, making it easier for changemakers to locate content and resources, drive greater user engagement and impact, and make donations and event registration easier than ever.
- Named William J. (Bill) Bynum the 2022 recipient of Independent Sector's John W. Gardner Leadership Award in recognition of his extraordinary leadership as President and CEO of the HOPE family of organizations.



October 2022

- Announced two new board directors – Dr. John Brothers, president of T. Rowe Price Foundation and president of T. Rowe Price Charitable; and Dr. Carmen Rojas, president and CEO of Marguerite Casey Foundation, to serve a three-year term. Additionally, Stacey D. Stewart, CEO, Mothers Against Drunk Driving (MADD), was re-elected to a second term.
- Partnered with the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), and Nonprofit Policy Forum, to host the 11th annual Nonprofit Public Policy Symposium. The theme was “Nonprofits 9 to 5: What a Way to Make a Livin.’”



November 2022

- Held the virtual 2022 Upswell Summit, attended by hundreds of changemakers, to engage, network, and collaborate on innovative strategies to collectively build a healthy and just nation.

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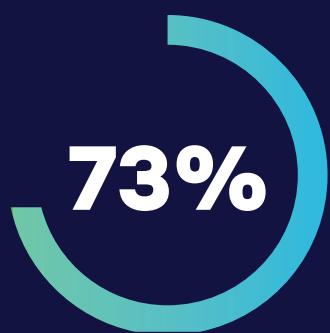
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INDEPENDENT SECTOR BY THE NUMBERS



3401

PEOPLE engaged at IS and Upswell Events



**OF UPSWELL POP-UP
SPEAKERS** were
Black, Indigenous, or
People of Color



**OF SURVEYED POP-UP
ATTENDEES REPORTED**
receiving useful information
during Pop-Ups about building
a healthy and equitable
sector or country



**OF SURVEYED POP-UP
ATTENDEES REPORTED**
feeling a sense of
community with Upswell
community members
during Pop-Ups



464

IS MEMBER ORGANIZATIONS



508,132

TOTAL WEBSITE PAGE VIEWS



54,644

**TOTAL SOCIAL MEDIA
FOLLOWERS**



1,029,629

SOCIAL MEDIA IMPRESSIONS

FINANCIALS

CONSOLIDATED STATEMENT OF FINANCIAL POSITION December 31, 2022 (With Comparative Totals for 2021)

	2022	2021
Assets		
Cash	\$ 3,536,660	\$ 7,567,510
Investments	9,309,255	11,237,703
Accounts and other receivables	47,565	72,551
Grants receivable and promises to give, net	166,000	802,000
Prepaid expenses and other assets	235,171	253,600
Deferred compensation plan assets	163,313	173,210
Deferred rent receivable	224,012	245,492
Leasing commission costs, net	39,669	64,162
Asset held for sale	15,977,300	-
Property and equipment, net	84,736	23,548,514
Total assets	\$ 29,783,681	\$ 43,964,742
Liabilities and Net Assets		
Liabilities:		
Accounts payable and accrued expenses	\$ 855,829	\$ 740,608
Deferred compensation plan liability	163,313	173,210
Notes payable	8,060,228	8,460,561
Deposits held in escrow	74,718	74,718
Total liabilities	9,154,088	9,449,097
Net assets:		
Total without donor restrictions:		
Undesignated	10,532,556	21,261,667
Board designated	7,155,192	8,950,733
	17,687,748	30,212,400
Total with donor restrictions	2,941,845	4,303,245
Total net assets	20,629,593	34,515,645
Total liabilities and net assets	\$ 29,783,681	\$ 43,964,742

Note: In 2022 the Board approved offering for sale a commercial office building that IS owns, and the related assets were reclassified and valued accordingly.

CONSOLIDATED STATEMENT OF ACTIVITIES Year Ended December 31, 2022 (With Comparative Totals for 2021)

	2022			2021
	Without Donor Restrictions	With Donor Restrictions	Total	Total
Revenue and support				
Grants and contributions	\$ 2,370,657	\$ 1,230,000	\$ 3,600,657	\$ 6,076,345
Membership contributions	1,363,259	–	1,363,259	1,760,650
Rental income	696,691	–	696,691	859,698
Conference fees	11,979	–	11,979	42,916
Investment return designated for current operations	372,000	–	372,000	350,000
Publication sales and other	80,356	–	80,356	87,632
Net assets released from restrictions:				
Satisfaction of program restrictions	1,409,217	(1,409,217)	–	–
Satisfaction of time restrictions	1,182,183	(1,182,183)	–	–
Total revenue and support	7,486,342	(1,361,400)	6,124,942	9,177,241
Expenses				
Program services:				
Community building	2,081,740	–	2,081,740	2,239,121
Policy leadership	2,328,358	–	2,328,358	2,040,795
Sector health	753,506	–	753,506	425,028
Membership engagement	170,527	–	170,527	209,654
Communications and marketing	2,035,784	–	2,035,784	1,795,324
Total program services	7,369,915	–	7,369,915	6,709,922
Supporting services:				
Fundraising	1,069,415	–	1,069,415	963,549
Finance and operations	798,794	–	798,794	340,054
Executive offices	890,982	–	890,982	1,235,413
Total supporting services	2,759,191	–	2,759,191	2,539,016
Building services:				
Tenant operations	577,755	–	577,755	907,251
Building operations	248,566	–	248,566	446,855
Total building services	862,321	–	862,321	1,354,106
Total expenses	10,991,427	–	10,991,427	10,603,044
Change in net assets before other items	(3,505,085)	(1,361,400)	(4,866,485)	(1,425,803)
Investment (loss) gain in excess of amount for current operations	(1,937,741)	–	(1,937,741)	535,975
Impairment loss	(7,081,826)	–	(7,081,826)	–
Change in net assets	(12,524,652)	(1,361,400)	(13,886,052)	(889,828)
Net assets				
Beginning	30,212,400	4,303,245	34,515,645	35,405,473
Ending	\$ 17,687,748	\$ 2,941,845	\$ 20,629,593	\$ 34,515,645

Note: Change in net assets was primarily impacted by two non-operating accounting adjustments: a value impairment related to the commercial office building owned by IS, and decline in market value of investments.

2022 BOARD, COMMITTEES, & ADVISORY GROUPS

OFFICERS

Fred Blackwell, Chair
Chief Executive Officer
The San Francisco Foundation

Sarah Kastelic, Vice Chair
Executive Director
National Indian Child Welfare Association

Michael McAfee, Secretary
President and CEO
PolicyLink

Jennifer Ford Reedy, Treasurer
President
Bush Foundation

Phoebe Boyer, At-Large
President and CEO
Children's Aid

BOARD MEMBERS

Nicole Anderson
AVP Social Innovation and President
AT&T Foundation

Fred Blackwell, Chair
Chief Executive Officer
The San Francisco Foundation

Phoebe Boyer
President and CEO
Children's Aid

Dr. John Brothers
President
T. Rowe Price Foundation and President
of T. Rowe Price Charitable

Sonya Campion
President
Campion Advocacy Fund

Ann Mei Chang
CEO
Candid

Jim Clark
President and CEO
Boys & Girls Clubs of America

Jennifer Ford Reedy, Treasurer
President
Bush Foundation

Sarah Kastelic, Vice Chair
Executive Director
National Indian Child Welfare Association

Janine Lee
President and CEO
Philanthropy Southeast

Michael McAfee, Secretary
President and CEO
PolicyLink

Suzanne McCormick
President and CEO
YMCA of the USA

Dr. Manuel Pastor
Distinguished Professor
Equity Research Institute, University of
Southern California

Adam Russell Taylor
President
Sojourners

Stacey Stewart
CEO
Mothers Against Drunk Driving

David Williams
Principal
Deloitte LLP

AUDIT COMMITTEE

David Williams, Chair
Principal
Deloitte LLP

Ann Mei Chang
CEO
Candid

Suzanne McCormick
President and CEO
YMCA of the USA

GOVERNANCE AND NOMINATING COMMITTEE

Janine Lee, Chair
President and CEO
Philanthropy Southeast

Nicole Anderson
AVP Social Innovation and President
AT&T Foundation

Fred Blackwell
Chief Executive Officer
The San Francisco Foundation

Dr. John Brothers
President
T. Rowe Price Foundation and President
of T. Rowe Price Charitable

COMMUNITY BUILDING COMMITTEE

Michael McAfee, Chair
President and CEO
PolicyLink

Nicole Anderson
AVP Social Innovation and President
AT&T Foundation

Dr. John Brothers
President
T. Rowe Price Foundation and President
of T. Rowe Price Charitable

Jim Clark
President and CEO
Boys & Girls Clubs of America

Suzanne McCormick
President and CEO
YMCA of the USA

Dr. Manuel Pastor
Distinguished Professor
Equity Research Institute, University of
Southern California

Stacey Stewart
CEO
Mothers Against Drunk Driving

FINANCE COMMITTEE

Jennifer Ford Reedy, Chair
President
Bush Foundation

Phoebe Boyer
President and CEO
Children's Aid

Stacey Stewart
CEO
Mothers Against Drunk Driving

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Sonya Campion, Chair

President
Campion Advocacy Fund

Ivy Allen

President
Foundation for the Mid South

Jennifer Blatz

President and CEO
StriveTogether

John Damon

Chief Executive Officer
Canopy Children's Solutions

Carol Emig

President
Child Trends

Jennifer Hoos Rothberg

Executive Director
Einhorn Collaborative

Virginia Kase Solomón

Chief Executive Officer
League of Women Voters of the
United States

Tulaine Montgomery

Co-CEO
New Profit Inc.

Michael Nyenhuis

President and Chief Executive Officer
United States Fund for UNICEF

Sonia Pérez

Acting CEO and Chief Operating Officer
UnidosUS

Rhea Suh

President and CEO
Marin Community Foundation

Maria Yuan

Founder and CEO
IssueVoter

PUBLIC POLICY COMMITTEE

Sarah Kastelic, Chair

Executive Director
National Indian Child Welfare Association

David Williams, Vice Chair

Principal
Deloitte LLP

Kalia Abiade

Vice President, Programs
Pillars Fund

Ana Marie Argilagos

President and CEO
Hispanics in Philanthropy

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Partner
Holland & Knight Law Firm

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and Public Policy
Council of Michigan Foundations

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Vice President of Member Engagement
Philanthropy Southeast

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Vice President, Advocacy
UNCF

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Executive Director
Native Ways Federation

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Upbring

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Fidelity Charitable

Janeen Comenote

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Native CDFI Network

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Congressional Hispanic Caucus Institute

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StriveTogether

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Conrad N. Hilton Foundation

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Nonprofit Leadership and Director, Do
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Brownstein Hyatt Farber Schreck

Kristen Harper

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Michigan Nonprofit Association

Noam Unger

Vice President for Global Development
Policy and Learning
InterAction

Maria Yuan

Founder and CEO
IssueVoter

**NONPROFIT
INFRASTRUCTURE
COALITION (formerly
Nonprofit Infrastructure
Investment Advocacy
Group, or NIIAG)****Ronda Jackson, Chair**

Vice President of Policy, Advocacy and
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Jeffrey Moore, Chair

Chief Strategy Officer
Independent Sector

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Carly Bad Heart Bull

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Native Ways Federation

Greg Baldwin

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VolunteerMatch

Lindsay Barsky

Director of Congressional Affairs
Orthodox Union Advocacy Center

Catherine Beane

Vice President, Advocacy and Public
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Regina Bell

Director of Government Relations and
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MENTOR

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Raising A Village Foundation

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JFNA

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Nonprofit Vote

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The Henry Ford

Heather Noonan

Vice President for Advocacy
League of American Orchestras

Jude O'Reilly

Chief Executive Officer
VolunteerMatch

Nina Ozlu Tunceli

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Affairs, Executive Director, Americans
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Americans for the Arts

Laura Plato

CEO
VolunteerMatch

Janay Queen Nazaire

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National Council of Urban Indian Health

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GivingTuesday

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PolicyLink

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Consultant
American Heart Association

Cynthia Schuman Ottinger

Deputy Director for Philanthropy
Programs
Program on Philanthropy and Social
Innovation (PSI) - The Aspen Institute

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League of California Community
Foundations

David Shapiro

CEO
MENTOR

James Siegal

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Rusty Stahl

President and CEO
Fund the People

Tooshar Swain

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Americans for the Arts

Philip Tabas

Vice President, General Counsel
The Nature Conservancy

Steve Taylor

Manager, Public Policy
United Way Worldwide

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Engagement, American Bankers
Association; Executive Director, ABA
Foundation

Mark Turner

Chief Solutions Officer
Colorado Nonprofit Association

Christopher Vincent

Vice President of Government Relations
and Advocacy
Habitat for Humanity International

Laura Walling

Vice President of Government Affairs
Goodwill Industries International, Inc.

Julie Waterman

Advocacy Director
City Parks Alliance

Nancy Wolanski

Executive Director
Grantmakers Council of Rhode Island

Christopher Worman

Vice President, Alliances and Program
Development
TechSoup

Elizabeth Youngling

Humanities Policy Fellow
American Academy of Arts & Sciences

2022 CONTRIBUTORS

GENERAL SUPPORT

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as of September 2023

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