



# NEO.

PHILANTHROPY

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## STRATEGIC PLAN

2024 - 2027

## A NOTE FROM OUR PRESIDENT

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**Since its creation, NEO Philanthropy has been a trusted link between funders and the grassroots organizations that power movements of transformation.**

Founded in 1983, as Public Interest Projects by Donald Ross, NEO Philanthropy is celebrating its 40th year in service to the growth and health of movements by laying out a new strategic vision to further justice on the most critical issues of our day.

*Progress is made in fits and starts.*

During the lifetime of NEO we have witnessed many advances that were forged through on-the-ground coalition building, out-of-the-box thinking about what is possible on matters of policy, and steady perseverance. We have also experienced heart-wrenching setbacks as progress we thought had been advanced was rolled back. Right now, these setbacks are shifting realities for people in every community of the US with the most historically marginalized groups--

Black people, indigenous people, people of color, women, LGBTQI people, immigrants, and people with disabilities-- bearing the brunt of these painful impacts.

*More than ever it is imperative that the direction of the movements advocating for further progress and change is guided by leaders and organizations that are closest to the challenges.*

There is a role for philanthropy to play, but consistent with the values that have guided us since our founding, any efforts should be in service of the strengthening and supporting of movements. To sustain this difficult work over time it is necessary to prioritize the health and wellbeing of the leaders and organizers doing the painstaking work toward change.



On issues of gender justice and reproductive rights, immigration rights, racial justice, preservation of democracy, and climate justice, the stakes are enormous. Given the profound consequences for people’s lives now and in the future, NEO Philanthropy will continue to support the movements driving toward progress with an unwavering, courageous, and trusted approach. Doing so will further an ecosystem of strong, sustainable social justice movements.

Over the last five years, NEO Philanthropy has invested \$516 Million in direct grants to grassroots groups and core support for projects.

***We take our direction from the grassroots.***

One such example is when the Four Freedoms Fund was created as a collaborative fund focused on immigration rights 20 years ago there was a conscious decision to only give grants that were advancing the work in the field. That fund is still going strong and doing remarkable work in building networks, advancing policy wins at the state level, and investing in the leaders of the future of the immigration rights movement.

In order to continue to advance movements toward justice,

***NEO Philanthropy has committed to five pillars in its new strategic plan: Sustainability, Infrastructure, Culture, Collaboration, and Impact.***

In this document, you can learn more about how these pillars will work together to advance the work going forward.

When we work together to build and strengthen movements of justice there is nothing we can’t accomplish.

There is much more work to do to fulfill a vision of a more just and equitable world, but it’s important to take stock after four decades of what has proven to be most effective and what it will take to continue the journey toward progress.

*With gratitude,*

Michele Lord  
President of NEO Philanthropy

# NEO

AT A GLANCE

**\$140**  
MILLION BUDGET

**400+**  
GRANTEES

**300+**  
TOTAL STAFF

**50+**  
CENTRAL  
STAFF

**250+**  
PROJECT  
STAFF

**90+**  
FISCALLY  
SPONSORED  
PROJECTS

## PARTNERS

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FUNDERS

SOCIAL JUSTICE  
MOVEMENTS

PEERS IN  
PHILANTHROPY

## PROGRAMS

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FOUR  
FREEDOMS  
FUND

STATE  
INFRASTRUCTURE  
FUND

DONOR  
SERVICES

NEO CORE  
OPERATIONS

FISCAL  
SPONSORSHIPS

STRATEGIC  
PARTNERSHIPS

## VISION

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We envision a just, democratic, and equitable world where social justice movements are powerful, connected, and resourced to achieve their vision for change. In partnership with changemakers and funders we will build a more innovative, responsive, and accountable philanthropic sector that centers the wisdom and leadership of BIPOC and other marginalized communities.

# FOCUS

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IMMIGRATION



VOTING RIGHTS



REPRODUCTIVE JUSTICE



RACIAL JUSTICE



CLIMATE JUSTICE



LGBTQ RIGHTS

## MISSION

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We nurture strong, sustainable, and transformative movements for justice by connecting changemakers and funders, supporting emerging leaders and movements, and driving resources to groups accelerating change.



# STRATEGY

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Shift Philanthropy  
to Center Equity

Connect Funders  
& Changemakers



Drive Resources  
to Most Impacted

Support Emerging  
Groups & Leaders



# VALUES

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## - Community -

We value each other, honor our differences, and work together with a shared purpose. We strive for a NEO community where everyone is treated with respect, empowered to grow, and encouraged to take care of themselves and each other. As individuals, we bring commitment, passion, humor, and purpose to this community.

## - Courage -

We embrace risk-taking and vulnerability, aspire to bravery and courage, and boldly do what is right over what is easy.

## - Equity -

We hold ourselves accountable to centering diversity, equity, and inclusion as a part of our work even when that requires new ways of working and leading, re-evaluating our operating policies and practices, and building the skills of staff and leaders.

## - Justice -

We strive for justice by elevating the voices of grantees and projects among funders, donors, and intermediaries in order to share power and support movements for racial, gender, migrant, and climate justice.

## - Learning -

We value experimentation, learning, curiosity and innovation through piloting new approaches to our work and continuous improvement. We are willing to try new ideas, even when the outcome is uncertain, in the pursuit of our mission.

## - Partnership -

As a philanthropic intermediary, we value partnership and foster collective power as a force for progressive change. We strive to be responsive and transparent in addressing the needs of our partners, projects, grantees, funders, and staff. We build clear communication and trust with stakeholders in the field to shift who has access to power and resources.

# PRIORITIES

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## - Sustainability -

Growing Intentionally for the Long Term

## - Brand -

Defining NEO Philanthropy

## - Collaboration -

Sharing Goals, Strategies, and Language

## - Infrastructure -

Resourcing Teams for Opportunity

## - Impact -

Measuring and Leveraging Success

## - Culture -

Shifting Systems Toward Equity and Belonging

# NEO.

PHILANTHROPY

## LEADERSHIP

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Michele Lord, President

Erin Ballard, Chief Operating Officer and Executive VP

Su Hyun Lim, Chief Financial Officer and VP of Infrastructure

Alicia Wade, Chief of Staff

Rini Chakraborty, Vice President, Four Freedoms Fund

Erica Teasley Linnick, Vice President, State Infrastructure Fund

Shelby Geter, Director of Human Resources

Laura Henderson, Vice President of Operations & Internal Capacity Building

Sarah Motola, Director of Fiscal Sponsorship

Margarita Rubalcava, Vice President of Strategic Partnerships

Aileen Sánchez, Director of Donor Services

Rutledge Simmons, Vice President and General Counsel

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Darren Sandow

UNWAVERING, TRUSTED, MOVEMENT BUILDERS.

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[neophilanthropy.org](https://neophilanthropy.org)