



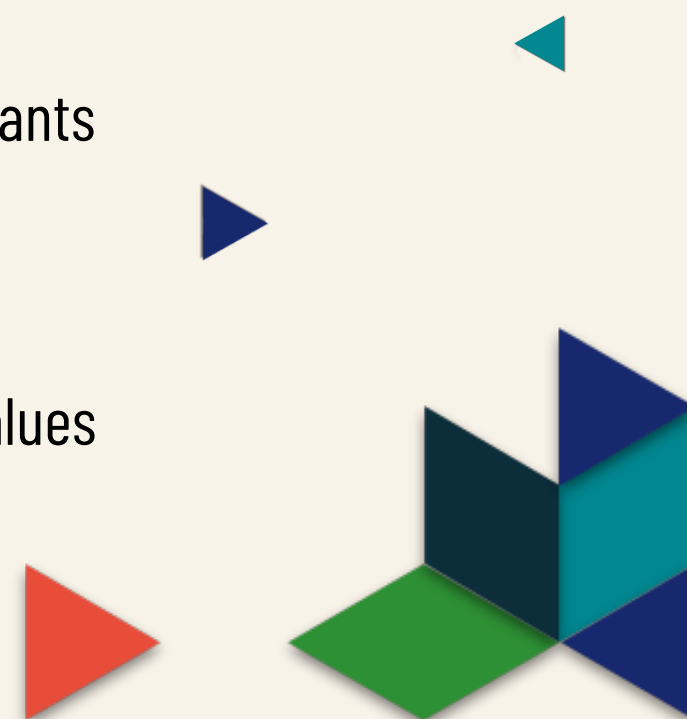
2023 Impact Report

KTISIS CAPITAL



TABLE OF CONTENTS

02	Letter to stakeholders
03	Client profiles
05	Services
07	Thought Leadership
08	Our team
09	Affiliated consultants
10	Fellows
11	Living into our values



Reflecting on the journey of the past year fills us with gratitude as we present Ktisis Capital's 2023 Impact Report—a narrative that echoes our collective dedication to fostering change. At Ktisis, our compass is set by a profound mission: to guide individual donors, families, foundations, and philanthropic collaboratives in mobilizing resources to advance racial, social, economic, and environmental justice.

Our values — Justice & Equity, Integrity & Trust, Wholeness & Complexity, Care & Kindness, and Learning & Curiosity — permeate every aspect of our work. They are the driving force behind our pursuit of a world where justice is not just an aspiration but a lived reality for all.

Navigating the work to move resources toward justice in the face of ongoing societal and environmental challenges has been both a privilege and challenge this year. We've moved critical resources to frontline fights, and reflected among our team and with our clients how the work can feel insufficient in the face of the challenges our world is facing. We're celebrating the steps forward — launching new democracy and environmental justice projects, hosting the first in-person gathering of progressive donor network leaders since COVID, welcoming new affiliated consultants, and launching our fellowship program to help change the face of philanthropic advising — even as we acknowledge how much work still lies ahead.

Our engagements with long-term clients have deepened, and new partnerships have flourished with organizations steadfast in their commitment to advancing justice in all its forms. These relationships form the core of our collective effort to address systemic challenges and build a more just and sustainable world.

As we share these stories and achievements, we embrace the responsibility that accompanies our work. Transparency, accountability, and continuous learning remain at the forefront of our ethos. The belief in collective action and the importance of amplifying the voices of those most affected by injustice continue to propel us forward.

We invite you to journey through the pages of our 2023 Impact Report, a testament to the collective dedication of our team and partners. Together, we are shaping a narrative of positive change—a narrative rooted in justice, equity, and shared humanity. We hope you'll join us on this journey in 2024 and beyond.

With gratitude and determination,

Ktisis Capital



Client Profiles

The work to advance justice, and mobilizing the resources to support this work, spans the globe and so does the work of Ktisis Capital. While a significant portion of our work is focused in the Americas, we also work with clients from Europe to Australia and beyond.

Peterffy Foundation

Ktisis Capital has supported the Peterffy Foundation for nearly a decade through advising and grants management. The foundation is structured with three funds, each led by a family member trustee. As advisors, Ktisis supports the trustees in their learning journeys and grantmaking across the globe.

For example, the Living Forest Project recognizes the deep connection between the presence of Indigenous peoples and the health of our planet. As part of our advising work, Ktisis supported the trustee through an exploration of models of philanthropy, including participatory grantmaking. Our belief in learning by doing meant part of the learning journey was funding and engagement with individual participatory funds. This led to multi-year investments in the Indigenous Women's Flow Fund (IWFF) at the Kindle Project and general operating support for the Kindle Project. The IWFF cohort consists of five Indigenous women from around the United States in a seven-year initiative. The participants are invited for their leadership, community connection, desire to learn and share, enthusiasm, and ability to demonstrate and engage with forward-thinking, solutions-oriented lenses. Over the initial three years of the fund (2020-2023) the cohort moved \$830,000 to 27 Indigenous-led groups and organizations.

As part of Ktisis' work, our staff participates in the donor learning cohort alongside one of the family members to engage together in the philanthropic learning journey. Additionally, as part of the general operating support, Ktisis staff meets monthly with Kindle Project leadership as a thought partner and coach in their organizational journey. The experience supporting the Fund and the Kindle Project has also informed the making of several additional grants from the Living Forest Project focused on shifting power and centering community wisdom.

Committee on States

Ktisis led a research into the challenges and opportunities for progressive state governance in collaboration with Committee on States (COS) and a steering committee of national and state partners. Together, we explored how to capitalize on leftward shifts in state leadership via the development of progressive state governance plans and identified funding opportunities to spur this work forward. With recent electoral victories in Michigan, Minnesota, Massachusetts, Pennsylvania, and Arizona that have secured or moved these states towards Democratic trifectas, we have an opportunity to maximize the impact of these wins and advance a more ambitious progressive agenda in the states if we attend to governance well.

During the first phase of this project, Ktisis interviewed organizers, consultants, advisors, and current and former elected leaders to document the lessons learned from governance transitions and planning processes. These insights provided a better understanding of what it takes to ensure that progressive electoral victories translate into more progressive outcomes for voters. This inquiry resulted in a published report that documents findings and lessons learned and provides a roadmap for future action.

Following this initial phase of work, we will be working with COS to explore additional needs and opportunities to support progressive state governance. Future phases will look beyond the transition planning process to build national and state infrastructure to ensure underrepresented communities have stronger influence in state governance decisions, and that both new and longtime Democratic state leaders are able to successfully advance a more progressive agenda nationwide.

W.K. Kellogg Foundation

Ktisis has held multi-year contracts with the W.K. Kellogg Foundation (WKKF) since 2021, working closely with three key portfolios in the Office of the President: the Racial Equity and Community Engagement portfolio, the Strong and Effective Sector portfolio, and the Accelerate Philanthropy portfolio.

In our role, we serve WKKF in multiple capacities – as researchers, thought partners, strategists, and advisors. Our primary responsibility is to lift up the voice and perspective of nonprofits, grassroots organizations, activists, and community leaders that are on the frontlines of the complex issues WKKF aims to address and bring insight into best practices in justice-based philanthropy that can advance WKKF's work.

The nature of our work across all three portfolios includes conducting focus groups and one-on-one interviews with WKKF grantees and field leaders to gather insights, feedback, and recommendations at various stages of strategy development. We serve as a sounding board to pressure-test ideas and strategies to ensure decisions are informed by those most proximate to the issues. Working closely with WKKF program staff, we co-develop integrated strategies centered on advancing racial equity and healing through philanthropy and provide input on strengthening partnerships, collaboration, and effectiveness across the social sector.

Services

Ktisis Capital advises individual donors, families, foundations, networks, and collaboratives to mobilize resources to advance racial, social, economic, and environmental justice. Clients come to us seeking guidance and expertise in a variety of areas from giving and grantmaking to strategy and program design, program and operational support, governance, research, and learning.

Grantmaking

We work with individuals and organizations to develop, adopt, and improve effective giving practices, drawing on expertise regarding collective giving, participatory grantmaking, and centering those most affected by the problems we aim to solve. Our work spans a range of program areas and experience levels, with expertise in grantmaking strategies from conception through implementation. This work ranges across the areas of systems change, grappling with identity and power, translating strategy to practice, due diligence, democracy building, field building, and more, all with an eye toward moving more money more effectively to advance justice.

Strategy & Program Design

We work with clients through iterative and collaborative processes to build programs and strategies to have the deepest impact. Our team of consultants help create short- and long-term strategies, articulate giving philosophies and grantmaking principles, how and when to consider various philanthropic vehicles, the role of advocacy and education, and much more. Engagements can last from periodic, virtual programs, one-day immersive strategy sessions, to ongoing and continued advising. We also work to integrate strategy and programs across organizations and enterprises, including comprehensive communications plans for internal and external audiences.

Program & Operational Support

We provide services that enable clients to start, scale-up, or streamline programs and initiatives. We regularly serve as added capacity for one-time or emerging projects not yet ready for full-time staffing and support existing teams with shifting and complex organizational management challenges. This includes developing special programs, starting and managing grantmaking programs or initiatives, refining processes and procedures, ensuring continuity by staffing a program during staff/leadership transition, and serving as sounding board and confidential advisor during planning and ideation of program development.

Research

We work with clients to develop and refine their areas of interest, with expertise in cultivating a network of field and movement leaders. We perform landscape scans and topical research, pulling together large amounts of data and information from the field and distilling it down to consumable and accessible formats, providing our clients with the information needed to make informed decisions. These audits of the current and future capacities of the field provide the data necessary to inform programmatic needs and strategic direction for our clients.

Governance

We provide experience and person-power to help develop and guide key governance structures and policies. We have expertise in navigating the dynamics entailed by the unique personal and organizational contexts, including serving as a confidential advisor and thought partner to family leaders, establishing new governance structures and policies, evolving existing structures and policies, linking governance to programming and grantmaking strategy, leadership transitions, and maintaining and refining decision-making processes. We have served clients ranging from small community foundations to multi-billion dollar international operations.

Learning

We design, develop, and deliver tailored learning opportunities and coaching for both individuals and full organizations. This work spans a range of areas and experience levels – whether you are looking to go deep on a specific topic or are looking to bring your stakeholders up to speed on the policies and practices of the field, our team of consultants can customize any learning experience to your specific needs. We collaboratively create opportunities for learning around new partnerships, areas for growth, and innovations that align with new priority areas or build upon the legacy of existing work.



Thought Leadership

Funding Change Blog

The Funding Change Blog offers behind-the-scenes insights into the work of Ktisis Capital. Through thoughtful analysis and commentary, our team shares their observations on emergent opportunities in philanthropy and social change efforts. Last year as we began to expand our blog, we covered topics including:

- Our initial “[Response to SCOTUS Affirmative Action Ruling](#)” including a statement of solidarity and first resources for funders, which has deepened into ongoing work in the months since
- Reflections from our Senior Director Estevan on “[Beyond Independence Day: A Meditation on Celebrating the 4th of July](#)” which ripple through our democracy work today
- After the Lahaina fires, we quickly put together “[Supporting Maui: Rapid Response Funding Opportunities](#)”

In the year to come, we aim to increase both the range and frequency of our posts to Funding Change, sharing insights from our client work, commentary on the field of philanthropy, and research and tools to help move resources towards just

Social Justice Donor Survey

In late 2023, we launched our inaugural survey of social justice donors which we hope will serve as the first recurring & comparative analysis of social justice donor behavior against broader philanthropic trends (contrasting with the ongoing Study of Charitable Giving by Affluent Households from Bank of America/Lilly School of Philanthropy).

- Closed in early 2024 with over 80 responses (significantly exceeding our target of 50 responses in the first year), results will be available in late spring 2024. But initial highlights include the fact that two thirds of progressive donors have a giving strategy in place that guides their giving
- The most frequent giving areas were, perhaps unsurprisingly, democracy/political activities, environment and climate justice, as well as racial justice and healing
- A large majority give to more than 20 organizations and movements annually

In Q2 of 2024, we will release the full survey results and analysis comparing social justice donor behavior to mainstream giving trends. This pioneering dataset will empower us to better understand and activate resources for the fights ahead. As we reflect on the progress of this past year, we thank our survey participants and look forward to even more groundbreaking insights to come.

Our Team



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Senior Consultant



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Jason Franklin, PhD
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Estevan Muñoz-Howard
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Senior Director

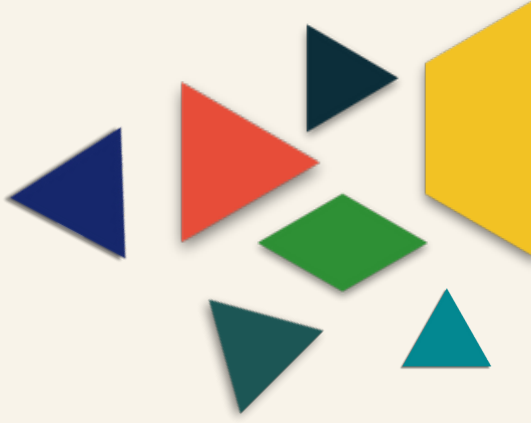


Michael Pratt
he/him
Associate Director



Alison Upton López, MA
she/her
Senior Director

Ktisis Capital prides itself on hiring a team of dedicated and innovative staff with a passion and commitment to justice in all its forms. We firmly believe that convening a team from varied backgrounds who hold diverse and intersecting identities is not only representative of the world but lends a unique set of perspectives to the way that we approach our work with clients.



Affiliated Consultants

In addition to the core Ktisis staff, we work with a range of affiliated consultants, independent consultants who bring expertise and flex capacity to our team. This program bridges the gap and removes the barriers many solo practitioners face — isolation, infrastructure needed to scale, and more. This year, our affiliate team grew by three; welcome to Ayushi, Georgia, and V!



Letarik Amare
she/her



Vanessa Daniel
she/her



Hali Lee
she/her



Mijo Lee, JD
she/her



Laura Loescher
she/her



Georgia Mathews, MA-SI
she/her



Jason McGill, PhD
he/him



Ayushi Vig
she/her



Inaugural Fellows

The Ktisis Capital Fellowship Program was launched in 2023 to support diverse young professionals with aspirations of working in philanthropy and/or social justice. Too often a field that is accessible only to those with considerable personal privilege or access to philanthropy, over time we hope our fellowship will offer another pathway for inspiring BIPOC and LGBTQ professionals to engage in philanthropic advising and ultimately help shift the very field they are joining. All fellows take part in a jointly-designed learning journey, which includes regular collective learning, collaborative projects, and opportunities to connect with a range of Ktisis staff and partners.



Mona Saidi

she/her

Communications Fellow

Mona joins our team with a strong foundation in journalism and a deep commitment to harnessing the power of storytelling to drive social change. As a fellow, she is excited to immerse herself in the world of impact-driven initiatives, leveraging her journalistic expertise to create compelling narratives that inspire action and promote positive transformation.

During her fellowship, Mona made significant contributions to [The Carmack Collective's annual report](#). Her work encompassed a wide range of responsibilities, including conducting market research to inform strategic decisions, crafting engaging content that effectively communicates the organization's mission and impact, and providing valuable design input to ensure the report's visual appeal.



Divya Seth, DO

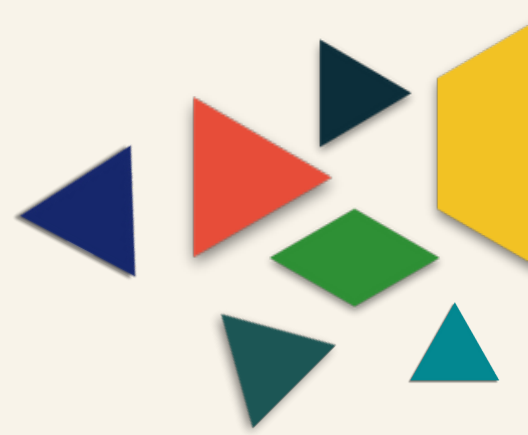
they/them

Programs & Learning Fellow

Divya's journey to this fellowship is a testament to their unwavering commitment to making a difference. After completing their doctorate of osteopathic medicine (DO) and embarking on a pediatric residency, Divya found themselves confronted with the glaring inequities deeply rooted within the healthcare system. Driven by a profound desire to address these disparities, they sought out this fellowship as an opportunity to expand their skillset in advocacy and social change, equipping themselves with the tools necessary to drive meaningful reform.

Through their fellowship, Divya made significant contributions to various learning-focused initiatives. Their invaluable feedback and support were instrumental in the development of several project proposals, ensuring that each one was well-crafted and aligned with the organization's goals. Additionally, Divya played a crucial role in conducting research for Ktisis's ongoing thought leadership work.

Living into our values



In addition to our expanding client work and field leaders, 2023 was a year of deep internal work. Beyond simply articulating a set of values, we have spent time working to intentionally implement our values across the many facets of our work, both internally and externally, considering the ways each value should impact and shape systems and processes at every level of our organization – and then developing an action and accountability plan regarding what should change, improve, shift, etc. to reflect what we have discovered during that process.

For example, throughout Q1 of 2023, we focused on our **Learning & Curiosity** value, which resulted in the adoption of a formal learning component within our standard project cycle, what we call our “Looking Forward/Looking Back” process which involves taking time both before a project begins and after it ends to ask, reflect on, and document answers to key questions regarding the work and how we can improve moving forward. Continuing with our focus on **Learning & Curiosity**, we also began organizing a regular learning club, where staff & affiliates lead conversations on a particular topic, article, or experience relevant to our work and the larger field. We kicked off in 2023 with a rich conversation around Maurice Mitchell’s piece, [Building Resilient Organizations](#), which has impacted internal work and multiple client projects throughout the year.

At our Q4 retreat, we focused on our **Care & Kindness** and **Integrity & Trust** values. Much of this work amounted to reflecting on, discussing, and documenting specific examples of behaviors and actions that evidence (or undermine) living into these values and how they regularly show up in our day-to-day work. We reaffirmed our commitments to one another as a team. In particular, we dove into the questions of how we uphold and advance justice in complicated conversations with clients and field partners, especially across differences and when those conversations may be difficult.

As we look forward to continuing this work in 2024, we realize that this is an evergreen process, and to make sure that our work and the way that we approach our work stays relevant and impactful, we commit to constantly checking our values against the wider needs of the world, and then, in turn, our daily actions against those values.

OUR VALUES...

Justice & Equity

Integrity & Trust

Wholeness & Complexity

Care & Kindness

Learning & Curiosity

Client List

Ktisis has worked with a wide range of clients since we were established in 2015. From individual donors and families to family, public and private foundations, to donor networks and funder collaboratives, our clients last year included:

Australian Communities Foundation

Australian Environmental Grantmakers Network

Australian Jewish Funders

Committee on States

Democracy Fund Voice

Fidelity Charitable

Funders' Collaborative for Youth Organizing

Global Greengrants Fund

Hidden Leaf Foundation

Impact Driven Philanthropy Collaborative

Justice Associates

Kellogg School of Management at Northwestern University

Lake County Community Foundation

Lord Mayor's Charitable Trust

Mannifera Collective

Movement Voter Project

Healthcare Foundation of Northern Lake County

Ottinger Foundation

Paul Ramsay Foundation

Peterffy Foundation

Philanthropy Australia

Port Phillip Community Foundation

Private Wealth Network

Progressive Political Power Fund

Proteus Fund

Raikes Foundation

Reichstein Foundation

Ross Trust

TEW Foundation

The Carmack Collective

West MI Progress PAC

WK Kellogg Foundation

Those marked in orange indicate new clients in 2023