

Building Our Strengths to Inform and Transform Philanthropy

Annual Report

FISCAL YEAR 2021-2022









Table of Contents

A Message From Our Executive Director
A Message From the Vice Provost for Research Administration
Highlights From 2021–2022 5
Positioning the Johnson Center for the Future
Finances and Financial Narrative 10
Donors and Grantmakers11
Clients
Leadership and Advisory Councils
Johnson Center Staff

Dorothy A. Johnson Center for Philanthropy

The Dorothy A. Johnson Center for Philanthropy at Grand Valley State University was established in 1992 with support from the W.K. Kellogg Foundation. Our mission is to be a global leader in helping individuals and organizations understand, strengthen, and advance philanthropy, resulting in a smart, adaptive sector that helps create strong, inclusive communities.

We put research to work with and for professionals across the country and the world. Through professional education offerings; research, evaluation, and consulting services; and bold thinking to advance the field, we support a philanthropic ecosystem defined by effective philanthropy, strong nonprofits, and informed community change.

A Message From Our Executive Director

As we entered a new phase of the COVID-19 pandemic over the past year, some things returned to "normal," other things settled into a new version of normal, and much is still in flux. In the face of all these changes, the need for a strong philanthropic sector remained constant. One of the biggest lessons of the recent past has been the importance of the philanthropic infrastructure. The relationships and coordination that were built over time became incredibly important to getting resources and information quickly disseminated.

The pandemic and calls for greater social justice heightened the need for data to understand the status of nonprofits and communities. That demand continues as decisions are being made about how to allocate both federal and philanthropic dollars, to ensure that these decisions are made equitably. The Johnson Center's research and tools have helped to meet this demand, and we added capacity to our data team to ensure that we can continue to meet the need for data.

Philanthropic professionals, whether they work in the funder or nonprofit segments of the sector, need ongoing professional development. The switch to online learning that occurred during the pandemic has endured, with the result that education and training opportunities became more broadly available. While much training will remain online, we also are mindful that learning is a social process and we're beginning to see an interest in in-person programs again. Under new leadership of our learning services team, these programs will continue to adapt to ensure that we continue to offer a best-in-class suite of professional development offerings.

As I write this last letter during my term as executive director — retirement beckons — my hope is that we all continue to value and invest in that infrastructure to ensure that we are ready to face the next opportunities that present themselves. I have the utmost confidence that the Johnson Center team, with Bob Smart's guidance, is well positioned to continue its leadership role in this effort.

Best wishes, and deep gratitude.



Teresa (Teri) Behrens, Ph.D. Executive Director Dorothy A. Johnson Center for Philanthropy

A Message From the Vice Provost for Research Administration

At Grand Valley State University, our mission is to empower learners in their pursuits, professions, and purpose. This mission is mirrored in that of GVSU's Dorothy A. Johnson Center for Philanthropy: to help individuals and organizations understand, strengthen, and advance philanthropy for stronger, inclusive communities. Learners come to us at every stage of their lives — fresh out of high school, or 20 years into a career. Whatever their aim, our mission is to help them achieve theirs.

The 2021-2022 academic and fiscal year marked my first with direct responsibility for the Johnson Center. In my capacity as vice provost for research administration, I have worked with Johnson Center team members and been aware of their work for years. It has been a true pleasure this year to dig in with them. I have come to know them as individuals — and as a family. Their bonds with one another and with the work they do supporting nonprofit and foundation practitioners across the country and the world is truly remarkable.

Giving is one of our most natural acts as human beings. It is the thing that builds belonging. With our neighbors, our coworkers, our family, and friends, we give and receive the gifts of time, talent, treasure, testimony, and ties every day. Each act of giving builds a new bridge, uniting us to one another and strengthening our communities.

The decision to give can be simple or complicated, burdensome, or easy. We can decide to give once or to give continuously to one person or to many. Philanthropy quickly becomes complicated. The same urge that drives us to give, drives us to give well. To have the greatest impact with our gifts.

The Johnson Center is a special place because our goal every day is to help philanthropy and the people who make up this sector maximize their impact. We provide the resources, professional development courses, capacity building services, research, and evaluation that changemakers need to build a better world. Most importantly, each person at the Johnson Center is here to support those changemakers. I am honored to be a part of the Johnson Center and its work.



Robert Smart, Ph.D. Vice Provost for Research Administration & Executive Director, Center for Scholarly and Creative Excellence Grand Valley State University

Highlights From Fiscal Year 2021-2022

AUGUST 18, 2021

The generous support of community partners and Johnson Center staff members combines to launch the **Juan Olivarez Learning Equity Endowment.** The endowment will provide professional learning opportunities and strategic services at little or no cost to small nonprofits in Michigan that have traditionally faced challenges accessing resources.

NOVEMBER 1, 2021

M. Gasby Brown, founder & principal of The Gasby Group, and Isaiah Oliver, president & CEO of the Community Foundation for Greater Flint, join the Johnson Center's Leadership Council.

DECEMBER 15, 2021

In a new report, *Time-Limited Foundations: Lessons from a CEO Peer Group,* the Johnson Center shares the experiences and reflections of an active group of philanthropy leaders in a new report, Dr. Teri Behrens provides ongoing facilitation and support to this group.

JANUARY 18, 2022

As our team researched and wrote **11 Trends in Philanthropy for 2022**, we found that many of the topics we looked into reflect the sector's grappling with a profound question: What role does philanthropy play in our national project — that of *E Pluribus Unum*?

FEBRUARY 15, 2022

After 14 years with the Johnson Center, and nearly four years as executive director, **Teri Behrens announces her intention to retire** from the Johnson Center. Teri's last day in the role was September 30, 2022.

MARCH 1, 2022

The publication of Vol. 13, Issue 4 of *The Foundation Review*, "**Community Leadership and the Sustainable Development Goals** (SDGs)," launches a series of webinars engaging nonprofits and foundations on their use of the SDGs as a framework, strategy, and evaluation tool.

MARCH 31, 2022

The Health Equity in Grand Rapids' "Neighborhoods of Focus" Social Determinants of Health Report, produced with support from the W.K. Kellogg Foundation, investigates how health-promoting resources like education, transportation, and homeownership are distributed across the west and southeast portions of the city.

APRIL 5, 2022

The Johnson Center partners with the Aspen Institute's Program on Philanthropy and Social Innovation to publish *Stories from the Frontier: Breakthroughs, Challenges, and Recommendations from the First Five Years of Open 990 Data.* The report explores how making 990 data searchable and available for free to the public has revolutionized nonprofit information and scholarship by massively reducing costs and increasing efficiency.

APRIL 20, 2022

Frey Foundation Chair for Family Philanthropy Dr. Michael Moody, graduate assistant Holly Honig, and 21/64 publish **Next Gen Donor Learning**, a guide to designing learning journeys for next gen philanthropists. The report was supported by the Greater Houston Community Foundation and is a resource for the field.

MAY 6, 2022

Aimée Laramore joins the Johnson Center as director of learning services. With more than two decades of experience in the nonprofit sector, her specialities include faith-based and cultural philanthropy, fundraising best practices, and capacity building.

JUNE 16, 2022

The Johnson Center hosts its first-ever Spanish-language webinar for philanthropic leaders in Mexico and Latin America, facilitated by W.K. Kellogg Community Philanthropy Chair Dr. Michael Layton with support from the C.S. Mott Foundation and in partnership with Comunalia, the alliance of Mexico's community foundations.

JUNE 28, 2022

The Foundation Review editorial team publishes a special double issue examining philanthropy's response to the crises of 2020.

Positioning the Johnson Center for the Future

The individuals who make up the Johnson Center at GVSU are all members of many communities — including the community that is the Johnson Center. Each of these communities continued to experience its own uncertainty and resilience as we moved through another year of a pandemic in fiscal year 2022 (July 1, 2021–June 30, 2022), the delta variant, the omicron variant, and continued political and social tensions.

Together, we navigated these shifts in our daily lives and in the interests, needs, and capacities of the field of philanthropy. While continuing to grow our existing lines of work, FY 2022 was a year of transition for us — forward and up. A significant focus of our work this year was to anticipate and position ourselves effectively for the work of FY 2023 (July 1, 2022–June 30, 2023), to build on our strengths to inform and transform the field of philanthropy.

- A strategic expansion of the Johnson Center's staff. Our rapidly expanding portfolio of major research and evaluation projects, professional development and capacity building services, and available resources and products required additional staff. With support from GVSU's Office of the President, the Johnson Center added two new staff positions this year, a digital marketing associate and a data analyst. Three other open positions were also filled.
- **Celebrating the Johnson Center's 30th anniversary.** The Johnson Center was first established at GVSU in 1992. This year, Tory Martin, director of communications and strategic partnerships, and an internal task force including Trish Abalo, Kallie Bauer, Tiana Hawver, Karen Hoekstra, Michael Moody, and Mandy Sharp Eizinger designed and prepared a series of research projects, events, fundraising efforts, and storytelling to celebrate this milestone year. Those activities will be shared publicly in FY 2023.
- Identifying the next inspiring sector leader to head the Johnson Center. In February 2022, Teri Behrens announced her intention to retire as executive director of the Johnson Center after four years in the role and 14 years at the center. The second half of the fiscal year, therefore, included a major effort with staff and GVSU colleagues to engage and prepare an executive recruiting firm to conduct a national search for a new executive director.

The Juan Olivarez Learning Equity Endowment

The Johnson Center hosted Juan Olivarez, Ph.D., for a three-year term as distinguished scholar in residence for diversity, equity, and inclusion, from 2018–2021. Juan's work at the center was dedicated to advancing inclusion and equity in philanthropy, with a focus on inclusive growth strategies and equitable talent development. In early 2021, the Johnson Center and many long-time partners of Juan's sought a way to honor his work to support learning and resources for smaller nonprofits.

In August 2021, the Johnson Center announced the Juan Olivarez Learning Equity Endowment (JOLEE). JOLEE's goal is to provide the Johnson Center's professional learning opportunities and strategic services at little or no cost to small nonprofits that have traditionally had challenges accessing resources.

The endowment was launched with the generous support of many Johnson Center staff members, GVSU staff and faculty, community members, and several local foundations. Through shared classrooms and unique programs, this endowment will touch the lives and missions of many nonprofit leaders at once — encouraging a community that strives together and thrives together.

Expanding and Investing in Our Talented Team

The Johnson Center's staff and Leadership Council expanded in key ways this year.

In November, we were delighted to welcome Isaiah Oliver, president & CEO of the Community Foundation of Greater Flint, and M. Gasby Brown, founder & principal of The Gasby Group, to our Leadership Council. Isaiah brings his experience as a groundbreaking, next-generation leader in Michigan's philanthropic ecosystem to our team, while Gasby's expertise in fundraising and network-building are critical capacities as we enter out 30th anniversary year.

In FY 2022, the Johnson Center onboarded five new staff members.

- Two new data analysts, Alexandra Akaakar, M.S., and Emily Dorn Jex, M.S., joined the Johnson Center in the first week of January 2022.
- Our communications & engagement team added a digital marketing associate position to enhance our ability to reach national and international audiences with our products and services. Angie Vuyst joined the Johnson Center in this role in March.
- Aimée Laramore, M.B.A., brings more than two decades of experience and expertise in nonprofit capacity building, cultural and faith-based philanthropy, and fundraising best practices and success in annual fund, major gift, and campaign fundraising to her role as director of learning services. She joined out team in May.
- Jackie Smith, Ph.D., joined the Johnson Center as research manager at the end of the fiscal year.

This year also saw significant investments in our existing staff.

- Kevin Peterson was promoted to senior program associate.
- Tamela Spicer was promoted to senior program manager.
- Tory Martin was promoted to director of communications and strategic partnerships.

Increasing our Fundraising and Business Development Capacity and Activities

In August 2021, the Johnson Center informally adopted two strategies to guide our fundraising and business development efforts, in alignment with our current business plan:

Think BIG. To *inform* and *transform* the field of philanthropy, our research and initiatives must be broad enough in scope and applicability to merit significant, multi-year investments and to be of interest to nonprofits and funders everywhere.

Bring friends. The Johnson Center benefits from close working relationships with many in-state and out-ofstate partners. These partners bring unique expertise, networks, perspectives, and capacities. By developing projects and approaching potential funders and audiences together, we make the work and the case for support even stronger. We have seen this approach bear fruit in 2021-2022. Examples of our major collaborations include:

- Partnering with the Aspen Institute's Program on Philanthropy and Social Innovation to produce a new report for the field on the value of open 990s, further promoted through the publication of a supporting article in the *Stanford Social Innovation Review*.
- Working with over a dozen organizations to produce a special issue of *The Foundation Review* on the Sustainable Development Goals, with four webinars and several blog posts all supported by the C.S. Mott Foundation.

This year, the Johnson Center has also developed a close working relationship with GVSU's new vice president for university development, Laura Aikens. Vice President Aikens and the university development team are working with Tory Martin, director of communications and strategic partnerships, to increase contributed revenues at the center.

Expanding Our Professional Development Portfolio to Meet the Needs of Diverse Audiences

Throughout FY 2022, the Johnson Center's learning services team continued to advance courses to meet the needs of grantmaking institutions and nonprofit organizations, inclusive of new content, pilot workshops, and advanced curriculum development. Our professional development programs were still offered in a primarily virtual environment this year. As in the previous two years, going virtual has enabled us to continue increasing both the number of programs we offer and the geographic diversity of our audience. For instance:

- Nearly 2,000 practitioners from around the world registered for our public, online events.
- U.S.-based registrations are now evenly split between Michigan and all other U.S. states, illustrating our expanding reputation and reach beyond our home state.
- January to June, we offered 43 online sessions, setting a record for any six-month timeframe.

As we look to FY 2023, Aimée Laramore and her team are tasked with envisioning and filling several key roles within learning services. This process will include collectively imagining how the team can best meet the increasing demand for hybrid professional development opportunities. While our global audience benefits from the accessibility and affordability of virtual programming, more and more clients and potential clients are requesting a return to in-person engagements. Successfully meeting this transition will include expanding and deepening our bench of expert instructors and streamlining logistical processes.

Major Research Accomplishments

Community Data and Research Lab

In FY 2022, Western Michigan University was awarded a five-year, \$29.5 million Promise Neighborhoods grant from the federal government. The Johnson Center's Community Data and Research Lab was included as an evaluator on the project, ensuring a substantial body of work for the team through 2027. The scale of this commitment reflects the Johnson Center's growing number of multi-year, multi-million-dollar research and evaluation projects.

Much of our research and evaluation focus in FY 2022 spotlights diversity, equity, and inclusion learnings for the state of Michigan.

- In March 2022, the Johnson Center and Just Solutions produced the *Health Equity in Grand Rapids' "Neighborhoods of Promise" Social Determinants of Health* report with support from the W.K. Kellogg Foundation. The report offers demographic and baseline data on the social determinants of health in several Grand Rapids neighborhoods.
- With support from the Michigan Nonprofit Association, and in collaboration with Data Driven Detroit, the Johnson Center conducted the first-ever statewide survey of nonprofit leadership demographics in Michigan. The findings from this survey will be released in FY 2023.

Frey Foundation Chair for Family Philanthropy

This year, Michael Moody, Ph.D. — together with his graduate assistant, Holly Honig, and a research partner, Robyn Schein from 21/64 — completed a significant study of the next-gen donor engagement and learning programs at the Greater Houston Community Foundation. Based on this study they published an expansive case study and generated a detailed list of good practices meant to help improve the work of next-genoriented organizations across the nation. The case study is a major product coming out of the Frey Chair's ongoing Donor Journeys Initiative.

Moody was also a significant contributor to the Johnson Center's 30th anniversary planning committee. He undertook a unique project to compare the field of philanthropy from 1992, when the center first opened, to 2022, exploring how the sector has changed, how it has stayed the same, and questioning whether the ambitions of philanthropy's leaders in the early 1990s have been realized or not. This narrative will be published in FY 2023.

W.K. Kellogg Community Philanthropy Chair

Throughout the year, Michael Layton, Ph.D., strengthened critical partnerships with organizations in the United States and Latin America, such as Philanthropy Together (an initiative to advance the giving circles movement); Centro Mexicano para la Filantropía (CEMEFI); Comunalia in Monterey, Mexico; and the Worldwide Initiative for Grantmaker Support (WINGS) Research and Data Enthusiasts (RADE) committee.

These relationships are driving an expanding research, advocacy, and teaching agenda into giving circles, the Sustainable Development Goals, and the intersections of family and community philanthropy in Latin America. Layton will continue to pursue these projects in FY 2023.

Learning Services

In May 2021, the Johnson Center released a preliminary version of our Nonprofit Competency Model for Inclusive Leadership. The model was intentionally unfinished; we wanted to engage with the broader nonprofit community to incorporate their experiences, perspectives, and expertise into the final product. In FY 2022, Mandy Sharp Eizinger and Kevin Peterson conducted many interviews and follow-up conversations with nonprofit leaders to inform the competency model's evolution. The final version of the model will be released in FY 2023.

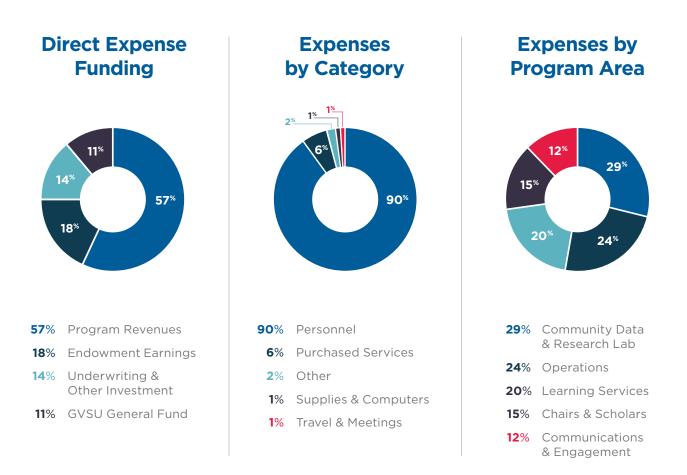
Finances and Financial Narrative

We are committed to ensuring our organizational sustainability by securing and stewarding the human, financial, and intellectual resources necessary to support our mission. As an academic center of GVSU, the university provides significant support for our operations in the form of administrative and facility costs and allocations from the GVSU general fund. The Johnson Center is responsible for raising the earned and contributed revenue necessary to cover our remaining annual budget of approximately \$3.5 million.

Our expenses are covered by a diverse funding mix that includes program revenues, general operating support, and earnings from several endowments. In the coming year, the Johnson Center will continue to pursue project-based opportunities and general endowment support that will enable us to contribute to a thriving university environment and secure our future.

We believe that a university's strength relies on the success and resilience of its many people and programs. We deeply value our relationships with the many passionate donors, partners, and clients who empower our work. Together, we are building a world that is shaped by smart, adaptive, and effective philanthropy.

Funding and Expenses for Fiscal Year 2021-22 (July 1, 2021-June 30, 2022)



Donors & Grantmakers, 2021-2022

Individual Donors

Robert Collier Dr. Priscilla Kimboko Arend D. Lubbers Pat Robinson J. Michael Schultz Dr. Mark Sidel

Institutional Donors & Grantmakers

Arts, Equity, and Education Fund Frey Foundation Max M. & Marjorie S. Fisher Foundation F. Martin and Dorothy A. Johnson Family Fund The Kresge Foundation The Lumina Foundation Open Society Foundations Plante Moran Nina Mason Pulliam Charitable Trust Raikes Foundation Stupski Foundation Ralph C. Wilson, Jr. Foundation Kate and Richard Wolters Foundation

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Juan Olivarez Learning Equity Endowment

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Clients, 2021-2022

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Our Leadership and Advisory Councils

Meet Our Leadership Council

The Johnson Center's Leadership Council advises on our strategic direction. We would like to thank the members for providing their time and expertise to help shape the center's direction.

David Egner, Co-Chair President & CEO Ralph C. Wilson, Jr. Foundation Kate Pew Wolters, Co-Chair President Kate and Richard Wolters Foundation

M. Gasby Brown Founder & CEO The Gasby Group, Inc.

Dan Cardinali President & CEO Independent Sector

Robert Collier Trustee Russell and Annabelle Woodard Family Fund

Mae Hong Vice President Rockefeller Philanthropy Advisors

Dorothy A. Johnson President Emeritus Council of Michigan Foundations

Arend D. Lubbers President Emeritus Grand Valley State University **Donna Murray-Brown** President & CEO Michigan Nonprofit Association

Isaiah Oliver President & CEO Community Foundation for Greater Flint

Joel J. Orosz, Ph.D. Distinguished Professor of Philanthropic Studies Emeritus Grand Valley State University

Diana R. Sieger President Grand Rapids Community Foundation

Robert Smart, Ph.D. Vice Provost for Research Administration & Executive Director, Center for Scholarly and Creative Excellence Grand Valley State University

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Patricia Patrizi Patrizi Associates

Michael Quinn Patton, Ph.D. Utilization-Focused Evaluation Hallie Preskill, Ph.D. FSG Social Impact Consultants

Patrick Rooney, Ph.D. Lilly Family School of Philanthropy Indiana University

Johnson Center Staff, 2021-2022

Trish Abalo Research Associate

Alexandra Akaakar, M.S. Data Analyst

Kallie Bauer, M.B.A. Project Manager

Teri Behrens, Ph.D. Executive Director

Emily Brenner Program Associate

Sherry Collver Unit Coordinator

Julie Couturier, CPA Director of Operations

Jamie DeLeeuw, Ph.D. Research Manager

Emily Dorn Jex, M.S. Data Analyst

Carol Glanville, M.A.Ed. Program Manager

Tiana Hawver, M.S. Office Coordinator

> **Brian Herron** Web Developer

Karen Hoekstra Marketing and Communications Manager

> Aimée Laramore, M.B.A. Director of Learning Services (May 2022–Present)

Michael Layton, Ph.D. W.K. Kellogg Community Philanthropy Chair

> **Tory Martin, M.A.** Director of Communications and Strategic Partnerships

Michael Moody, Ph.D. Frey Foundation Chair for Family Philanthropy

> Adriana Paz, M.S.C.I.S. Senior Database Administrator

Kevin Peterson, M.P.A. Senior Program Associate

Pat Robinson, M.P.A. Associate Director of Special Projects

> Mandy Sharp Eizinger, M.S. Program Manager

> > Jackie Smith, Ph.D. Research Manager

Tamela Spicer, M.A. Senior Program Manager

Leslie Starsoneck, M.S.W. Director of Learning Services (April 2020–November 2021)

Melyssa Tsai O'Brien, M.P.H. Research Manager

Angie Vuyst Digital Marketing Associate

Jeff Williams, M.A., M.B.A. Director, Community Data and Research Lab

> Aaron Yore-VanOosterhout, Ph.D. Research Manager