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Form **990**

Department of the Treasury
Internal Revenue Service

# Return of Organization Exempt From Income Tax

**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)**

▶ Do not enter social security numbers on this form as it may be made public.

▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

**A For the 2022 calendar year, or tax year beginning 01-01-2022 , and ending 12-31-2022**

**B** Check if applicable:
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/terminated
- ☐ Amended return
- ☐ Application pending

**C** Name of organization
NATIONAL GEOGRAPHIC SOCIETY

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) 1145 17TH ST NW
Room/suite

City or town, state or province, country, and ZIP or foreign postal code
WASHINGTON, DC 200364688

**D Employer identification number**
53-0193519

E Telephone number
(202) 857-7000

**G** Gross receipts $ 510,915,755

**F** Name and address of principal officer:
Jill Tiefenthaler
1145 17TH ST NW
WASHINGTON, DC 200364688

**H(a)** Is this a group return for subordinates? ☐ Yes ☑ No

**H(b)** Are all subordinates included? ☐ Yes ☐ No
If "No," attach a list. See instructions.

**H(c)** Group exemption number ▶

**I** Tax-exempt status: ☑ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

**J Website:** ▶ nationalgeographic.org

**K** Form of organization: ☑ Corporation ☐ Trust ☐ Association ☐ Other ▶

**L** Year of formation: 1888

**M** State of legal domicile: DC

## Part I Summary

**Activities & Governance**

1 Briefly describe the organization's mission or most significant activities:
The purpose of the Society shall be to increase and diffuse geographic knowledge and use the power of science, exploration, education and storytelling to illuminate and protect the wonder of the world.

2 Check this box ▶ ☐

| | | | |
|---|---|---|---|
| 3 | Number of voting members of the governing body (Part VI, line 1a) | 3 | 22 |
| 4 | Number of independent voting members of the governing body (Part VI, line 1b) | 4 | 21 |
| 5 | Total number of individuals employed in calendar year 2022 (Part V, line 2a) | 5 | 662 |
| 6 | Total number of volunteers (estimate if necessary) | 6 | 23 |
| 7a | Total unrelated business revenue from Part VIII, column (C), line 12 | 7a | 147,631 |
| b | Net unrelated business taxable income from Form 990-T, Part I, line 11 | 7b | 0 |

| | | | Prior Year | Current Year |
|---|---|---|---|---|
| Revenue | 8 | Contributions and grants (Part VIII, line 1h) | 52,344,649 | 74,952,274 |
| | 9 | Program service revenue (Part VIII, line 2g) | 1,430,405 | 4,506,060 |
| | 10 | Investment income (Part VIII, column (A), lines 3, 4, and 7d ) | 124,158,205 | 63,617,377 |
| | 11 | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | 25,943,245 | 14,484,735 |
| | 12 | Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 203,876,504 | 157,560,446 |
| Expenses | 13 | Grants and similar amounts paid (Part IX, column (A), lines 1–3 ) | 18,047,105 | 29,687,875 |
| | 14 | Benefits paid to or for members (Part IX, column (A), line 4) | | 0 |
| | 15 | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10) | 54,764,301 | 69,879,911 |
| | 16a | Professional fundraising fees (Part IX, column (A), line 11e) | 1,573,469 | 4,104,880 |
| | b | Total fundraising expenses (Part IX, column (D), line 25) ▶7,868,492 | | |
| | 17 | Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e) | 66,801,731 | 85,248,479 |
| | 18 | Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) | 141,186,606 | 188,921,145 |
| | 19 | Revenue less expenses. Subtract line 18 from line 12 | 62,689,898 | -31,360,699 |

| | | | Beginning of Current Year | End of Year |
|---|---|---|---|---|
| Net Assets or Fund Balances | 20 | Total assets (Part X, line 16) | 2,037,588,957 | 1,790,673,716 |
| | 21 | Total liabilities (Part X, line 26) | 314,759,361 | 322,857,288 |
| | 22 | Net assets or fund balances. Subtract line 21 from line 20 | 1,722,829,596 | 1,467,816,428 |

## Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

| | | |
|---|---|---|
| **Sign Here** | Signature of officer | 2023-05-15<br>Date |
| | Michael Ulica President CFO<br>Type or print name and title | |

| | | | | | |
|---|---|---|---|---|---|
| **Paid Preparer Use Only** | Print/Type preparer's name | Preparer's signature | Date<br>2021-11-12 | Check ☐ if self-employed | PTIN<br>P01871563 |
| | Firm's name ▶ BDO LLP | | | Firm's EIN ▶ 13-5381590 | |
| | Firm's address ▶ 12505 Park Potomac Ave<br>Potomac, MD 20854 | | | Phone no. (301) 385-2516 | |

May the IRS discuss this return with the preparer shown above? See Instructions. . . . . . . . . . . . . . ☑ Yes ☐ No

**For Paperwork Reduction Act Notice, see the separate instructions.** Cat. No. 11282Y Form **990** (2022)



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## Part III **Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III . . . . . . . . . . . . . . ☑

**1** Briefly describe the organization's mission:

To increase and diffuse geographic knowledge in the broadest sense, using the power of science, exploration, education and storytelling to illuminate and protect the wonder of the world.

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . . . . . . . . . . . . . . . . . ☐ Yes ☑ No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? . . . . . . . . . . . . . . . . . . . . . . . . . . ☐ Yes ☑ No

If "Yes," describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses $ 62,409,549 including grants of $ 21,512,294 ) (Revenue $ 188,961 )

Science Innovation The Science Innovation team oversees the Society's grantmaking efforts in science, conservation and technology, develops and manages major programs, and establishes programmatic partnerships with like-minded non-governmental organizations (NGOs). Science Innovation Program descriptions continued on Sch. O

**4b** (Code: ) (Expenses $ 59,391,718 including grants of $ 6,245,976 ) (Revenue $ 3,982,406 )

STORYTELLING AND OUTREACH The Storytelling team oversees the Society's grant making efforts in photography, journalism, film, immersive media, podcasts and other media. Its programs also support capacity building, ambitious media projects for impact and efforts to amplify voices historically underrepresented in the media. Storytelling and Outreach program descriptions continued on Sch. O.

**4c** (Code: ) (Expenses $ 20,561,674 including grants of $ 1,929,605 ) (Revenue $ 271,931 )

NATIONAL GEOGRAPHIC EDUCATION PROGRAMS NATIONAL GEOGRAPHIC'S EDUCATION DIVISION AMPLIFIES AND EXTENDS THE WORK OF EXPLORERS INTO CLASSROOMS, COMMUNITIES, AND WITH YOUNG PEOPLE TO ILLUMINATE AND PROTECT THE WONDER OF OUR WORLD BY OFFERING A SUITE OF PROGRAMS AND EXPERIENCES FOR EDUCATORS AND YOUTH INCLUDING EXTERNSHIPS, ONLINE COURSES, AND LEADERSHIP OPPORTUNITIES. WE ALSO PROVIDE CLASSROOM MATERIALS THROUGH THE FREE EDUCATIONAL WEBSITE NATGEOED.ORG AS WELL AS FUND EDUCATORS THROUGH OUR GRANTS PROGRAM. Continued on Sch. O Education Program Descriptions

(Code: ) (Expenses $ including grants of $ ) (Revenue $ 62,762 )

In 2022, miscellaneous program activity included an impact investing directive, continuing sustainability initiatives, and a reading room and library. Continued on Sch. O Other Miscellaneous Programs.

**4d** Other program services (Describe in Schedule O.)
(Expenses $ including grants of $ ) (Revenue $ 62,762 )

**4e** **Total program service expenses** ▶ 142,362,941

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## Part IV **Checklist of Required Schedules**

| | | Yes | No |
|---|---|---|---|
| **1** | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete | Yes | |

| | | Line | Yes | No |
|---|---|---|---|---|
| 1 | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A* | 1 | Yes | |
| 2 | Is the organization required to complete *Schedule B, Schedule of Contributors*? See instructions. | 2 | Yes | |
| 3 | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I* | 3 | | No |
| 4 | **Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II* | 4 | | No |
| 5 | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? *If "Yes," complete Schedule C, Part III* | 5 | | |
| 6 | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D,* Part I | 6 | | No |
| 7 | Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II* | 7 | | No |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D,* Part III | 8 | Yes | |
| 9 | Did the organization report an amount in Part X, line 21 for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV* | 9 | | No |
| 10 | Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi endowments? *If "Yes," complete Schedule D, Part V* | 10 | Yes | |
| 11 | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable. | | | |
| a | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D,* Part VI. | 11a | Yes | |
| b | Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII* | 11b | Yes | |
| c | Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII* | 11c | | No |
| d | Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX* | 11d | | No |
| e | Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X* | 11e | Yes | |
| f | Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X* | 11f | Yes | |
| 12a | Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII* | 12a | | No |
| b | Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional* | 12b | Yes | |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E* | 13 | | No |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States? | 14a | Yes | |
| b | Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV* | 14b | Yes | |
| 15 | Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV* | 15 | Yes | |
| 16 | Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? *If "Yes," complete Schedule F, Parts III and IV* | 16 | Yes | |
| 17 | Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I.* See instructions. | 17 | Yes | |
| 18 | Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II* | 18 | | No |
| 19 | Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III* | 19 | | No |
| 20a | Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H* | 20a | | No |
| b | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? | 20b | | |
| 21 | Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II* | 21 | Yes | |

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Part IV **Checklist of Required Schedules** *(continued)*

| | | | Yes | No |
|---|---|---|---|---|

| | | | Yes | No |
|---|---|---|---|---|
| 22 | Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III* | 22 | Yes | |
| 23 | Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J* | 23 | Yes | |
| 24a | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a* | 24a | | No |
| b | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | 24b | | |
| c | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? | 24c | | |
| d | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? | 24d | | |
| 25a | **Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L,* Part I | 25a | | No |
| b | Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L,* Part I | 25b | | No |
| 26 | Did the organization report any amount on Part X, line 5 or 22 for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part II* | 26 | | No |
| 27 | Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? *If "Yes," complete Schedule L,*Part III | 27 | | No |
| 28 | Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): | | | |
| a | A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? *If "Yes," complete Schedule L, Part IV* | 28a | | No |
| b | A family member of any individual described in line 28a? *If "Yes," complete Schedule L, Part IV* | 28b | | No |
| c | A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? *If "Yes," complete Schedule L, Part IV* | 28c | | No |
| 29 | Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M* | 29 | Yes | |
| 30 | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M* | 30 | | No |
| 31 | Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I* | 31 | | No |
| 32 | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II* | 32 | | No |
| 33 | Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? *If "Yes," complete Schedule R, Part I* | 33 | Yes | |
| 34 | Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1* | 34 | Yes | |
| 35a | Did the organization have a controlled entity within the meaning of section 512(b)(13)? | 35a | Yes | |
| b | If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2* | 35b | Yes | |
| 36 | **Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2* | 36 | | No |
| 37 | Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI* | 37 | | No |
| 38 | Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? **Note.** All Form 990 filers are required to complete Schedule O. | 38 | Yes | |

Part V **Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response or note to any line in this Part V ☑

| | | | | | Yes | No |
|---|---|---|---|---|---|---|
| 1a | Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable | 1a | 415 | | | |
| b | Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable | 1b | 0 | | | |
| c | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? | | | 1c | Yes | |

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Part V **Statements Regarding Other IRS Filings and Tax Compliance** *(continued)*

| | | | | | Yes | No |
|---|---|---|---|---|---|---|
| **2a** | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return | 2a | 662 | | | |
| **b** | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? | | | 2b | Yes | |
| **3a** | Did the organization have unrelated business gross income of $1,000 or more during the year? | | | 3a | Yes | |
| **b** | If "Yes," has it filed a Form 990-T for this year?*If "No" to line 3b, provide an explanation in Schedule O* | | | 3b | | No |
| **4a** | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | | | 4a | Yes | |
| **b** | If "Yes," enter the name of the foreign country: ▶NL , BE<br>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). | | | | | |
| **5a** | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | | | 5a | | No |
| **b** | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | | | 5b | | No |
| **c** | If "Yes," to line 5a or 5b, did the organization file Form 8886-T? | | | 5c | | |
| **6a** | Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? | | | 6a | | No |
| **b** | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? | | | 6b | | |
| **7** | **Organizations that may receive deductible contributions under section 170(c).** | | | | | |
| **a** | Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor? | | | 7a | Yes | |
| **b** | If "Yes," did the organization notify the donor of the value of the goods or services provided? | | | 7b | Yes | |
| **c** | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? | | | 7c | | No |
| **d** | If "Yes," indicate the number of Forms 8282 filed during the year | 7d | | | | |
| **e** | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | | | 7e | | No |
| **f** | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | | 7f | | No |
| **g** | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? | | | 7g | | |
| **h** | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? | | | 7h | | |
| **8** | **Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? | | | 8 | | |
| **9** | **Sponsoring organizations maintaining donor advised funds.** | | | | | |
| **a** | Did the sponsoring organization make any taxable distributions under section 4966? | | | 9a | | |
| **b** | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | | | 9b | | |
| **10** | **Section 501(c)(7) organizations.** Enter: | | | | | |
| **a** | Initiation fees and capital contributions included on Part VIII, line 12 | 10a | | | | |
| **b** | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities | 10b | | | | |
| **11** | **Section 501(c)(12) organizations.** Enter: | | | | | |
| **a** | Gross income from members or shareholders | 11a | | | | |
| **b** | Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) | 11b | | | | |
| **12a** | **Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041? | | | 12a | | |
| **b** | If "Yes," enter the amount of tax-exempt interest received or accrued during the year. | 12b | | | | |
| **13** | **Section 501(c)(29) qualified nonprofit health insurance issuers.** | | | | | |
| **a** | Is the organization licensed to issue qualified health plans in more than one state?<br>**Note.** See the instructions for additional information the organization must report on Schedule O. | | | 13a | | |
| **b** | Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans | 13b | | | | |
| **c** | Enter the amount of reserves on hand | 13c | | | | |
| **14a** | Did the organization receive any payments for indoor tanning services during the tax year? | | | 14a | | No |
| **b** | If "Yes," has it filed a Form 720 to report these payments?*If "No," provide an explanation in Schedule O* | | | 14b | | |
| **15** | Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?<br>If "Yes," see the instructions and file Form 4720, Schedule N. | | | 15 | Yes | |
| **16** | Is the organization an educational institution subject to the section 4968 excise tax on net investment income?<br>If "Yes," complete Form 4720, Schedule O. | | | 16 | | No |
| **17** | **Section 501(c)(21) organizations.** Did the trust, or any disqualified or other person engage in any activities that | | | 17 | | |

would result in the imposition of an excise tax under section 4951, 4952, or 4953? . .
If "Yes," complete Form 6069.

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Part VI **Governance, Management, and Disclosure.** *For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.*

Check if Schedule O contains a response or note to any line in this Part VI . . . . ☑

**Section A. Governing Body and Management**

| | | | Yes | No |
|---|---|---|---|---|
| **1a** | Enter the number of voting members of the governing body at the end of the tax year | **1a** 22 | | |
| | If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O. | | | |
| **b** | Enter the number of voting members included in line 1a, above, who are independent | **1b** 21 | | |
| **2** | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? | **2** | | No |
| **3** | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? | **3** | | No |
| **4** | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? | **4** | | No |
| **5** | Did the organization become aware during the year of a significant diversion of the organization's assets? | **5** | | No |
| **6** | Did the organization have members or stockholders? | **6** | | No |
| **7a** | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? | **7a** | | No |
| **b** | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? | **7b** | | No |
| **8** | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: | | | |
| **a** | The governing body? | **8a** | Yes | |
| **b** | Each committee with authority to act on behalf of the governing body? | **8b** | Yes | |
| **9** | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O* | **9** | | No |

**Section B. Policies** (*This Section B requests information about policies not required by the Internal Revenue Code.*)

| | | | Yes | No |
|---|---|---|---|---|
| **10a** | Did the organization have local chapters, branches, or affiliates? | **10a** | | No |
| **b** | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? | **10b** | | |
| **11a** | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? | **11a** | Yes | |
| **b** | Describe on Schedule O the process, if any, used by the organization to review this Form 990. | | | |
| **12a** | Did the organization have a written conflict of interest policy? *If "No," go to line 13* | **12a** | Yes | |
| **b** | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? | **12b** | Yes | |
| **c** | Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe on Schedule O how this was done* | **12c** | Yes | |
| **13** | Did the organization have a written whistleblower policy? | **13** | Yes | |
| **14** | Did the organization have a written document retention and destruction policy? | **14** | Yes | |
| **15** | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? | | | |
| **a** | The organization's CEO, Executive Director, or top management official | **15a** | Yes | |
| **b** | Other officers or key employees of the organization | **15b** | Yes | |
| | If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions. | | | |
| **16a** | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? | **16a** | | No |
| **b** | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? | **16b** | | |

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed▶
AL , AK , AZ , AR , CA , CO , CT , DE , FL , GA , HI , ID , IL , IN , IA , KS , KY , LA , ME , MD , MA , MI , MN , MS , MO , MT , NE , NV , NH , NJ , NM , NY , NC , ND , OH , OK , OR , PA , RI , SC , SD , TN , TX , UT , VT , VA , WA , WV , WI , WY

18 Section 6104 requires an organization to make its Form 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☑ Upon request ☐ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records:
▶Michael Ulica 1145 17TH ST NW WASHINGTON, DC 200364688 (202) 807-7000

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Part VII **Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII . . . . . . . . . . . . . . . . . ☐

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

| **(A)** Name and title | **(B)** Average hours per week (list any hours for related organizations below dotted line) | **(C)** Position (do not check more than one box, unless person is both an officer and a director/trustee) | | | | | | **(D)** Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | **(E)** Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | **(F)** Estimated amount of other compensation from the organization and related organizations |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | | | |
| (1) Jill Tiefenthaler<br>CEO | 45.0 | X | | X | | | | 1,327,097 | 0 | 34,528 |
| (2) Afsaneh Beschloss<br>Trustee | 4.0 | X | | | | | | 0 | 0 | 0 |
| (3) ALEXANDRA GROSVENOR ELLER<br>TRUSTEE | 4.0 | X | | | | | | 6,121 | 0 | 0 |
| (4) Angel Cabrera<br>TRUSTEE | 4.0 | X | | | | | | 18,905 | 0 | 0 |
| (5) ANTHONY A WILLIAMS<br>TRUSTEE | 4.0 | X | | | | | | 6,770 | 0 | 0 |
| (6) Beth Comstock<br>Trustee | 4.0 | X | | | | | | 0 | 0 | 0 |
| (7) BRENDAN P BECHTEL<br>TRUSTEE | 4.0 | X | | | | | | 0 | 0 | 0 |
| (8) Claudia Madrazo<br>Trustee | 4.0 | X | | | | | | 0 | 0 | 0 |
| (9) Deborah Lehr<br>Trustee | 4.0 | X | | | | | | 0 | 0 | 0 |
| (10) Dina Powell McCormick | 4.0 | | | | | | | | | |

| (A) Name and title | (B) Average hours per week | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | (D) | (E) | (F) |
|---|---|---|---|---|---|---|---|---|---|---|
| Trustee | | X | | | | | | 0 | 0 | 0 |
| (11) ELLEN R STOFAN<br>TRUSTEE | 4.0 | X | | | | | | 1,036 | 0 | 0 |
| (12) FREDERICK J RYAN JR<br>TRUSTEE | 4.0 | X | | | | | | 1,036 | 0 | 0 |
| (13) GEORGE MUNOZ<br>TRUSTEE | 4.0 | X | | | | | | 10,431 | 0 | 0 |
| (14) JEAN CASE<br>Chairman | 4.0 | X | | | | | | 0 | 0 | 0 |
| (15) JOSEPH M DESIMONE<br>TRUSTEE | 4.0 | X | | | | | | 1,036 | 0 | 0 |
| (16) Katherine Bradley<br>Vice Chairman | 4.0 | X | | | | | | 1,036 | 0 | 0 |
| (17) Kevin J Maroni<br>Trustee | 4.0 | X | | | | | | 0 | 0 | 0 |

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Part VII **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

| (A) Name and title | (B) Average hours per week (list any hours for related organizations below dotted line) | (C) Position (do not check more than one box, unless person is both an officer and a director/trustee): Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | (D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | (E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | (F) Estimated amount of other compensation from the organization and related organizations |
|---|---|---|---|---|---|---|---|---|---|---|
| (18) Lyndon Rive<br>Trustee | 4.0 | X | | | | | | 0 | 0 | 0 |
| (19) Mark Moore<br>Trustee | 4.0 | X | | | | | | 1,036 | 0 | 0 |
| (20) Nancy Pfund<br>Trustee | 4.0 | X | | | | | | 14,462 | 0 | 0 |
| (21) Paula Kahumbu<br>Trustee | 4.0 | X | | | | | | 0 | 0 | 0 |
| (22) RAJIV SHAH<br>TRUSTEE | 4.0 | X | | | | | | 0 | 0 | 0 |
| (23) Strive Masiyiwa<br>TRUSTEE | 4.0 | X | | | | | | 0 | 0 | 0 |
| (24) MICHAEL ULICA<br>PRESIDENT/COO/TREASURER | 45.0 | | | X | | | | 837,263 | 0 | 27,724 |
| (25) Robert Young<br>CFO | 45.0 | | | X | | | | 383,837 | 0 | 31,220 |
| (26) Sumeet Seam<br>Chief Legal Officer | 45.0 | | | X | | | | 551,096 | 0 | 33,023 |
| (27) Crystal Brown<br>Chief Communications Officer | 45.0 | | | | X | | | 523,370 | 0 | 13,134 |
| (28) Ian Miller<br>Chief Science Innovation Officer | 45.0 | | | | X | | | 527,879 | 0 | 28,111 |
| (29) Jason Southern | 45.0 | | | | | | | | | |

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Chief Technology Officer | 45.0 | | | | X | | | 357,044 | 0 | 32,189 |
| (30) Kara Ramirez Mullins<br>Chief Advancement Officer | 45.0 | | | | X | | | 562,392 | 0 | 31,757 |
| (31) Kim Waldron<br>Chief of Staff Program Alignment | 45.0 | | | | X | | | 361,161 | 0 | 25,332 |
| (32) Mara Dell<br>Chief Human Resources Officer | 45.0 | | | | X | | | 413,188 | 0 | 23,258 |
| (33) Shannon Bartlett<br>Chief Diversity, Equity, Inclusion Officer | 45.0 | | | | X | | | 305,059 | 0 | 31,123 |
| (34) Vicki Phillips<br>EVP Chief Education Officer | 45.0 | | | | X | | | 498,774 | 0 | 0 |
| (35) Alex Moen<br>Chief Explorer Engagement Officer | 45.0 | | | | | X | | 347,363 | 0 | 32,900 |
| (36) Anthony Luckett<br>VP, Business Development | 45.0 | | | | | X | | 283,123 | 0 | 19,298 |
| (37) Enric Sala<br>Explorer in Residence | 45.0 | | | | | X | | 397,331 | 0 | 19,564 |
| (38) Kaitlin Yarnall<br>Chief Storytelling Officer SVP | 45.0 | | | | | X | | 342,227 | 0 | 32,903 |
| (39) Kristi Craig<br>Chief Investment Officer | 45.0 | | | | | X | | 582,911 | 0 | 20,760 |
| (40) FRANK BORMAN<br>TRUSTEE EMERITUS | | | | | | | X | 13,000 | 0 | 0 |
| (41) Gary E Knell<br>CEO President | 0.0 | | | | | | X | 22,700 | 0 | 0 |
| (42) TARA BUNCH<br>Chief Administrative Officer | 0.0 | | | | | | X | 295,394 | 0 | 0 |
| (43) Valerie Craig<br>VP, Operating Programs | | | | | | | X | 110,304 | 0 | 0 |
| **1b Sub-Total** | | | | | | | | | | |
| **c Total from continuation sheets to Part VII, Section A** | | | | | | | | | | |
| **d Total (add lines 1b and 1c)** | | | | | | | | 9,104,382 | 0 | 436,824 |

**2** Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 220

| | | | Yes | No |
|---|---|---|---|---|
| **3** | Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual* | 3 | Yes | |
| **4** | For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual* | 4 | Yes | |
| **5** | Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization?*If "Yes," complete Schedule J for such person* | 5 | | No |

## Section B. Independent Contractors

**1** Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| **(A)**<br>Name and business address | **(B)**<br>Description of services | **(C)**<br>Compensation |
|---|---|---|
| Digital Velocity Partners LLC<br><br>10 Glebe Place<br>London SW35LB<br>AE | IT SERVICES/CONSULTING | 4,289,214 |
| Hickok Cole Architects Inc<br><br>301 N St NE<br>Suite 300<br>Washington, DC 20002 | ARCHITECTURE | 3,317,765 |
| HBP Inc<br><br>952 Frederick St<br>Hagerstown, MD 21740 | FUNDRAISING | 2,562,176 |
| The Production Management Group LTD<br><br>7160 COLUMBIA GATEWAY DR<br>COLUMBIA, MD 21046 | FUNDRAISING | 2,435,318 |
| EPAM Systems Inc | IT SERVICES/CONSULTING | 2,117,739 |

41 University Dr
Newtown, PA 18940

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 151

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Part VIII **Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII . . . . . . . . . . . . . ☐

| Contributions, Gifts, Grants and Other Similar Amounts | | | (A) Total revenue | (B) Related or exempt function revenue | (C) Unrelated business revenue | (D) Revenue excluded from tax under sections 512 - 514 |
|---|---|---|---|---|---|---|
| 1a Federated campaigns | 1a | | | | | |
| b Membership dues | 1b | | | | | |
| c Fundraising events | 1c | | | | | |
| d Related organizations | 1d | | | | | |
| e Government grants (contributions) | 1e | 198,822 | | | | |
| f All other contributions, gifts, grants, and similar amounts not included above | 1f | 74,753,452 | | | | |
| g Noncash contributions included in lines 1a - 1f:$ | 1g | 1,283,028 | | | | |
| h **Total.** Add lines 1a-1f . . . . . . . ▶ | | | 74,952,274 | | | |

| Program Service Revenue | Business Code | (A) | (B) | (C) | (D) |
|---|---|---|---|---|---|
| 2a Storytelling Outreach | 900004 | 3,982,406 | 3,982,406 | | |
| b Education | 900004 | 271,931 | 271,931 | | |
| c Science Innovation | 900004 | 188,961 | 188,961 | | |
| d Other misc. programs | 900004 | 62,762 | 62,762 | | |
| e | | | | | |
| f All other program service revenue. | | 0 | 0 | 0 | 0 |
| g **Total.** Add lines 2a–2f. . . . . ▶ | | 4,506,060 | | | |

| | (i) Real | (ii) Personal | (A) | (B) | (C) | (D) |
|---|---|---|---|---|---|---|
| 3 Investment income (including dividends, interest, and other similar amounts) . . . . . . ▶ | | | 16,621,823 | | 147,631 | 16,474,192 |
| 4 Income from investment of tax-exempt bond proceeds ▶ | | | | | | |
| 5 Royalties . . . . . . . . . . . . . ▶ | | | 18,601,011 | | | 18,601,011 |
| 6a Gross rents (6a) | 18,184,088 | | | | | |
| b Less: rental expenses (6b) | 22,300,364 | | | | | |
| c Rental income or (loss) (6c) | -4,116,276 | 0 | | | | |
| d Net rental income or (loss) . . . . . . . . ▶ | | | -4,116,276 | | | -4,116,276 |

| | (i) Securities | (ii) Other | (A) | (B) | (C) | (D) |
|---|---|---|---|---|---|---|
| 7a Gross amount from sales of assets other (7a) | 378,050,499 | | | | | |

Other Revenue

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | assets other than inventory | | | | | | | |
| | Less: cost or other basis and sales expenses | 7b | 331,054,945 | | | | | |
| | Gain or (loss) | 7c | 46,995,554 | 0 | | | | |
| d | Net gain or (loss) ▶ | | | | 46,995,554 | | | 46,995,554 |
| 8a | Gross income from fundraising events (not including $ ______ of contributions reported on line 1c). See Part IV, line 18 | 8a | | | | | | |
| b | Less: direct expenses | 8b | | | | | | |
| c | Net income or (loss) from fundraising events ▶ | | | | | | | |
| 9a | Gross income from gaming activities. See Part IV, line 19 | 9a | | | | | | |
| b | Less: direct expenses | 9b | | | | | | |
| c | Net income or (loss) from gaming activities ▶ | | | | | | | |
| 10a | Gross sales of inventory, less returns and allowances | 10a | | | | | | |
| b | Less: cost of goods sold | 10b | | | | | | |
| c | Net income or (loss) from sales of inventory ▶ | | | | | | | |
| | | | Business Code | | | | | |
| 11a | | | | | | | | |
| b | | | | | | | | |
| c | OtherRevenueMiscAmt | | | | | | | |
| d | All other revenue | | | | 0 | 0 | 0 | 0 |
| e | **Total.** Add lines 11a–11d ▶ | | | | 0 | | | |
| 12 | **Total revenue.** See instructions ▶ | | | | 157,560,446 | 4,506,060 | 147,631 | 77,954,481 |

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## Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☑

| **Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.** | **(A)** Total expenses | **(B)** Program service expenses | **(C)** Management and general expenses | **(D)** Fundraising expenses |
|---|---|---|---|---|
| **1** Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 | 5,446,855 | 5,446,855 | | |
| **2** Grants and other assistance to domestic individuals. See Part IV, line 22 | 5,100,000 | 5,100,000 | | |
| **3** Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16. | 19,141,020 | 19,141,020 | | |
| **4** Benefits paid to or for members | | | | |
| **5** Compensation of current officers, directors, trustees, and key employees | 7,521,853 | 5,264,501 | 2,145,098 | 112,254 |
| **6** Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | | | | |
| **7** Other salaries and wages | 48,693,215 | 34,080,099 | 13,886,435 | 726,681 |
| **8** Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) | 1,612,963 | 1,128,904 | 459,988 | 24,071 |
| **9** Other employee benefits | 7,683,424 | 5,377,584 | 2,191,175 | 114,665 |
| **10** Payroll taxes | 4,368,456 | 3,057,457 | 1,245,806 | 65,193 |

| | (A) | (B) | (C) | (D) |
|---|---|---|---|---|
| **11** Fees for services (non-employees): | | | | |
| **a** Management | | | | |
| **b** Legal | 851,405 | | 851,405 | |
| **c** Accounting | 634,000 | | 634,000 | |
| **d** Lobbying | | | | |
| **e** Professional fundraising services. See Part IV, line 17 | 4,104,880 | | | 4,104,880 |
| **f** Investment management fees | 13,155,165 | 9,995,294 | 2,607,354 | 552,517 |
| **g** Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O) | 33,050,858 | 30,473,439 | 2,577,419 | 0 |
| **12** Advertising and promotion | 2,335,476 | 2,335,476 | | |
| **13** Office expenses | | | | |
| **14** Information technology | 1,020,081 | 149,071 | 866,647 | 4,363 |
| **15** Royalties | | | | |
| **16** Occupancy | 854,457 | 721,275 | 80,011 | 53,171 |
| **17** Travel | 6,155,392 | 4,169,133 | 540,086 | 1,446,173 |
| **18** Payments of travel or entertainment expenses for any federal, state, or local public officials | | | | |
| **19** Conferences, conventions, and meetings | 156,697 | 97,557 | 33,483 | 25,657 |
| **20** Interest | | | | |
| **21** Payments to affiliates | | | | |
| **22** Depreciation, depletion, and amortization | 2,678,516 | 1,715,694 | 876,472 | 86,350 |
| **23** Insurance | 1,916,627 | 705,888 | 1,210,739 | |
| **24** Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.) | | | | |
| **a** Programming and Marketing Costs | 15,810,178 | 11,895,516 | 3,362,145 | 552,517 |
| **b** Professional Fees | | | | |
| **c** Other | | | | |
| **d** | | | | |
| **e** All other expenses | 6,629,627 | 1,508,178 | 5,121,449 | 0 |
| **25** **Total functional expenses.** Add lines 1 through 24e | 188,921,145 | 142,362,941 | 38,689,712 | 7,868,492 |
| **26** **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☑ if following SOP 98-2 (ASC 958-720). | 12,888,716 | 7,390,081 | 3,872,770 | 1,625,865 |

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Part X **Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part IX ☐

| | | | (A) Beginning of year | | (B) End of year |
|---|---|---|---|---|---|
| Assets | **1** | Cash–non-interest-bearing | 80,976,635 | 1 | 74,546,829 |
| | **2** | Savings and temporary cash investments | | 2 | |
| | **3** | Pledges and grants receivable, net | 13,166,118 | 3 | 32,384,454 |
| | **4** | Accounts receivable, net | 12,951,150 | 4 | 10,244,615 |
| | **5** | Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons | 0 | 5 | 0 |
| | **6** | Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) | 0 | 6 | 0 |
| | **7** | Notes and loans receivable, net | 20,595,000 | 7 | 17,795,000 |
| | **8** | Inventories for sale or use | 231,603 | 8 | 162,929 |
| | **9** | Prepaid expenses and deferred charges | 6,185,130 | 9 | 7,501,225 |
| | **10a** | Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D — **10a** 184,131,457 | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| | b | Less: accumulated depreciation | 10b 95,056,825 | 78,043,007 | 10c | 89,074,632 |
| | 11 | Investments—publicly traded securities | | 675,651,000 | 11 | 518,927,000 |
| | 12 | Investments—other securities. See Part IV, line 11 | | 1,126,798,403 | 12 | 1,030,479,540 |
| | 13 | Investments—program-related. See Part IV, line 11 | | 0 | 13 | |
| | 14 | Intangible assets | | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | | 22,990,911 | 15 | 9,557,492 |
| | 16 | **Total assets.** Add lines 1 through 15 (must equal line 33) | | 2,037,588,957 | 16 | 1,790,673,716 |
| Liabilities | 17 | Accounts payable and accrued expenses | | 16,667,938 | 17 | 25,248,074 |
| | 18 | Grants payable | | 3,923,580 | 18 | 3,923,580 |
| | 19 | Deferred revenue | | 2,320,750 | 19 | 2,473,511 |
| | 20 | Tax-exempt bond liabilities | | | 20 | |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D | | | 21 | |
| | 22 | Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons | | 0 | 22 | 0 |
| | 23 | Secured mortgages and notes payable to unrelated third parties | | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated third parties | | 250,000,000 | 24 | 250,000,000 |
| | 25 | Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D | | 41,847,093 | 25 | 41,212,123 |
| | 26 | **Total liabilities.** Add lines 17 through 25 | | 314,759,361 | 26 | 322,857,288 |
| Net Assets or Fund Balances | | **Organizations that follow FASB ASC 958, check here ▶ ☐ and complete lines 27, 28, 32, and 33.** | | | | |
| | 27 | Net assets without donor restrictions | | 1,525,115,547 | 27 | 1,258,742,419 |
| | 28 | Net assets with donor restrictions | | 197,714,049 | 28 | 209,074,009 |
| | | **Organizations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 29 through 33.** | | | | |
| | 29 | Capital stock or trust principal, or current funds | | | 29 | |
| | 30 | Paid-in or capital surplus, or land, building or equipment fund | | | 30 | |
| | 31 | Retained earnings, endowment, accumulated income, or other funds | | | 31 | |
| | 32 | Total net assets or fund balances | | 1,722,829,596 | 32 | 1,467,816,428 |
| | 33 | Total liabilities and net assets/fund balances | | 2,037,588,957 | 33 | 1,790,673,716 |

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Part XI **Reconcilliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI ☑

| | | | |
|---|---|---|---|
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | 157,560,446 |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 188,921,145 |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | -31,360,699 |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A)) | 4 | 1,722,829,596 |
| 5 | Net unrealized gains (losses) on investments | 5 | -211,617,459 |
| 6 | Donated services and use of facilities | 6 | 100,000 |
| 7 | Investment expenses | 7 | |
| 8 | Prior period adjustments | 8 | |
| 9 | Other changes in net assets or fund balances (explain in Schedule O) | 9 | -12,135,010 |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | 10 | 1,467,816,428 |

Part XII **Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII ☐

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Accounting method used to prepare the Form 990: ☐ Cash ☑ Accrual ☐ Other ______ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O. | | | |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant? | 2a | | No |
| | If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: | | | |

☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis

| | | | | |
|---|---|---|---|---|
| **b** | Were the organization's financial statements audited by an independent accountant? | **2b** | Yes | |
| | If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:<br>☐ Separate basis ☑ Consolidated basis ☐ Both consolidated and separate basis | | | |
| **c** | If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? | **2c** | Yes | |
| | If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O. | | | |
| **3a** | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? | **3a** | | No |
| **b** | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits. | **3b** | | |

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Form 990 (2022)

## Additional Data

Return to Form

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**SCHEDULE A**
**(Form 990)**

Department of the Treasury
Internal Revenue Service

# Public Charity Status and Public Support

**Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.**
**▶ Attach to Form 990 or Form 990-EZ.**
**▶ Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

**Name of the organization**
NATIONAL GEOGRAPHIC SOCIETY

**Employer identification number**
53-0193519

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state:

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☑ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)

9 ☐ An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture. See instructions. Enter the name, city, and state of the college or university:

10 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**

12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**

b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**

c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**

d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**

e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

g Provide the following information about the supported organization(s).

| **(i)** Name of supported organization | **(ii)** EIN | **(iii)** Type of organization (described on lines 1- 10 above (see instructions)) | **(iv)** Is the organization listed in your governing document? | | **(v)** Amount of monetary support (see instructions) | **(vi)** Amount of other support (see instructions) |
|---|---|---|---|---|---|---|
| | | | **Yes** | **No** | | |
| | | | | | | |
| | | | | | | |
| **Total** | | | | | | |

**For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.** Cat. No. 11285F **Schedule A (Form 990) 2022**

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**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization failed to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year

| Calendar year (or fiscal year beginning in) ▶ | (a) 2018 | (b) 2019 | (c) 2020 | (d) 2021 | (e) 2022 | (f) Total |
|---|---|---|---|---|---|---|
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . . | 30,724,235 | 33,502,124 | 20,599,591 | 52,344,649 | 74,952,274 | 212,122,873 |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . | | | | | | 0 |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge.. | | | | | | 0 |
| 4 **Total.** Add lines 1 through 3 | 30,724,235 | 33,502,124 | 20,599,591 | 52,344,649 | 74,952,274 | 212,122,873 |
| 5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . | | | | | | 0 |
| 6 **Public support.** Subtract line 5 from line 4. | | | | | | 212,122,873 |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ▶ | (a) 2018 | (b) 2019 | (c) 2020 | (d) 2021 | (e) 2022 | (f) Total |
|---|---|---|---|---|---|---|
| 7 Amounts from line 4. . | 30,724,235 | 33,502,124 | 20,599,591 | 52,344,649 | 74,952,274 | 212,122,873 |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . | 93,695,389 | 87,112,402 | 79,279,835 | 96,292,362 | 98,188,558 | 454,568,546 |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on . . | 273,756 | 0 | 0 | 0 | 0 | 273,756 |
| 10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). . | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 **Total support.** Add lines 7 through 10 | | | | | | 666,965,175 |

12 Gross receipts from related activities, etc. (see instructions) . . . . . . . . . . . . . . . . . . **12** 33,885,521

13 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . . . . . . . ▶ ☐

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2022 (line 6, column (f) divided by line 11, column (f)) . . . . . . . . . **14** 31.80 %

15 Public support percentage for 2021 Schedule A, Part II, line 14 . . . . . . . . . . . . . . . . **15** 27.27 %

16a **33 1/3% support test—2022.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . . . . ▶ ☐

b **33 1/3% support test—2021.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . . . . ▶ ☐

17a **10%-facts-and-circumstances test—2022.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ ☑

b **10%-facts-and-circumstances test—2021.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . . . . ▶ ☐

**Schedule A (Form 990) 2022**

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**Part III Support Schedule for Organizations Described in Section 509(a)(2)**
(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in) ▶ | (a) 2018 | (b) 2019 | (c) 2020 | (d) 2021 | (e) 2022 | (f) Total |
|---|---|---|---|---|---|---|
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . | | | | | | |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose | | | | | | |
| 3 Gross receipts from activities that are | | | | | | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| | not an unrelated trade or business under section 513 . . . . . | | | | | | |
| 4 | Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. . . | | | | | | |
| 5 | The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| 6 | **Total.** Add lines 1 through 5 | | | | | | |
| 7a | Amounts included on lines 1, 2, and 3 received from disqualified persons | | | | | | |
| b | Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year. | | | | | | |
| c | Add lines 7a and 7b. . | | | | | | |
| 8 | **Public support.** (Subtract line 7c from line 6.) | | | | | | |

**Section B. Total Support**

| | **Calendar year (or fiscal year beginning in)** ▶ | **(a)** 2018 | **(b)** 2019 | **(c)** 2020 | **(d)** 2021 | **(e)** 2022 | **(f)** Total |
|---|---|---|---|---|---|---|---|
| 9 | Amounts from line 6. . . | | | | | | |
| 10a | Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. . | | | | | | |
| b | Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. | | | | | | |
| c | Add lines 10a and 10b. | | | | | | |
| 11 | Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on. | | | | | | |
| 12 | Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . | | | | | | |
| 13 | **Total support.** (Add lines 9, 10c, 11, and 12.). . | | | | | | |

14 **First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**. . . . . . ▶ ☐

**Section C. Computation of Public Support Percentage**

| | | | |
|---|---|---|---|
| 15 | Public support percentage for 2022 (line 8, column (f) divided by line 13, column (f)) . . . . . . . . . | 15 | |
| 16 | Public support percentage from 2021 Schedule A, Part III, line 15 . . . . . . . . . . . . . . . | 16 | |

**Section D. Computation of Investment Income Percentage**

| | | | |
|---|---|---|---|
| 17 | Investment income percentage for **2022** (line 10c, column (f) divided by line 13, column (f)) . . . . . . | 17 | |
| 18 | Investment income percentage from **2021** Schedule A, Part III, line 17 . . . . . . . . . . . . . | 18 | |

19a **33 1/3% support tests-2022.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . . . ▶ ☐

b **33 1/3% support tests—2021.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization . . . . . ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions . . . . ▶ ☐

**Schedule A (Form 990) 2022**

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**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, of Part I, complete Sections A and B. If you checked box 12b, of Part I, complete Sections A and C. If you checked box 12c, of Part I, complete Sections A, D, and E. If you checked box 12d, of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

| | | | **Yes** | **No** |
|---|---|---|---|---|
| 1 | Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in* ***Part VI*** *how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.* | 1 | | |
| 2 | Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *how the organization determined that the supported organization was described in section 509(a)(1) or (2).* | 2 | | |
| 3a | Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer lines 3b and 3c below.* | 3a | | |
| b | Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? *If "Yes," describe in* ***Part VI*** *when and how the organization made the* | | | |

| | | | Yes | No |
|---|---|---|---|---|
| | *determination.* | 3b | | |
| c | Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in* ***Part VI*** *what controls the organization put in place to ensure such use*. | 3c | | |
| 4a | Was any supported organization not organized in the United States ("foreign supported organization")? *If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.* | 4a | | |
| b | Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? *If "Yes," describe in* ***Part VI*** *how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.* | 4b | | |
| c | Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.* | 4c | | |
| 5a | Did the organization add, substitute, or remove any supported organizations during the tax year? *If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in* ***Part VI,*** *including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).* | 5a | | |
| b | **Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document? | 5b | | |
| c | **Substitutions only.** Was the substitution the result of an event beyond the organization's control? | 5c | | |
| 6 | Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? *If "Yes," provide detail in* ***Part VI.*** | 6 | | |
| 7 | Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990) .* | 7 | | |
| 8 | Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? *If "Yes," complete Part I of Schedule L (Form 990).* | 8 | | |
| 9a | Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? *If "Yes," provide detail in* ***Part VI.*** | 9a | | |
| b | Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If "Yes," provide detail in* ***Part VI.*** | 9b | | |
| c | Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? *If "Yes," provide detail in* ***Part VI.*** | 9c | | |
| 10a | Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If "Yes," answer line 10b below.* | 10a | | |
| b | Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings).* | 10b | | |

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**Part IV Supporting Organizations** (continued)

| | | | Yes | No |
|---|---|---|---|---|
| 11 | Has the organization accepted a gift or contribution from any of the following persons? | | | |
| a | A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization? | 11a | | |
| b | A family member of a person described on 11a above? | 11b | | |
| c | A 35% controlled entity of a person described on line 11a or 11b above? *If "Yes" to 11a, 11b, or 11c, provide detail in* ***Part VI***. | 11c | | |

**Section B. Type I Supporting Organizations**

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Did the officers, directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? *If "No," describe in* ***Part VI*** *how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.* | 1 | | |
| 2 | Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in* ***Part VI*** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.* | 2 | | |

**Section C. Type II Supporting Organizations**

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describe in **Part VI** how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).* | 1 | | |

**Section D. All Type III Supporting Organizations**

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? | 1 | | |
| 2 | Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? *If "No," explain in **Part VI** how the organization maintained a close and continuous working relationship with the supported organization(s).* | 2 | | |
| 3 | By reason of the relationship described in line 2 above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in **Part VI** the role the organization's supported organizations played in this regard.* | 3 | | |

**Section E. Type III Functionally-Integrated Supporting Organizations**

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year **(see instructions)**:

- **a** ☐ The organization satisfied the Activities Test. Complete **line 2** below.
- **b** ☐ The organization is the parent of each of its supported organizations. Complete **line 3** below.
- **c** ☐ The organization supported a governmental entity. Describe in **Part VI** how you supported a government entity (see instructions)

| | | | Yes | No |
|---|---|---|---|---|
| 2 | Activities Test. **Answer lines 2a and 2b below.** | | | |
| a | Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in **Part VI identify those supported organizations and explain** how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.* | 2a | | |
| b | Did the activities described on line 2a, above constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in **Part VI** the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.* | 2b | | |
| 3 | Parent of Supported Organizations. **Answer lines 3a and 3b below.** | | | |
| a | Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations?*If "Yes" or "No", provide details in **Part VI.*** | 3a | | |
| b | Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? *If "Yes," describe in **Part VI.** the role played by the organization in this regard.* | 3b | | |

**Schedule A (Form 990) 2022**





**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 *(explain in **Part VI**)*. **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

| | **Section A - Adjusted Net Income** | | (A) Prior Year | (B) Current Year (optional) |
|---|---|---|---|---|
| 1 | Net short-term capital gain | 1 | | |
| 2 | Recoveries of prior-year distributions | 2 | | |
| 3 | Other gross income (see instructions) | 3 | | |
| 4 | Add lines 1 through 3 | 4 | | |
| 5 | Depreciation and depletion | 5 | | |
| 6 | Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | 6 | | |
| 7 | Other expenses (see instructions) | 7 | | |
| 8 | **Adjusted Net Income** (subtract lines 5, 6 and 7 from line 4) | 8 | | |

| | **Section B - Minimum Asset Amount** | | (A) Prior Year | (B) Current Year (optional) |
|---|---|---|---|---|
| 1 | Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year): | 1 | | |
| a | Average monthly value of securities | 1a | | |
| b | Average monthly cash balances | 1b | | |
| c | Fair market value of other non-exempt-use assets | 1c | | |

| | | | | |
|---|---|---|---|---|
| d | **Total** (add lines 1a, 1b, and 1c) | 1d | | |
| e | **Discount** claimed for blockage or other factors (*explain in detail in* ***Part VI***): | | | |
| 2 | Acquisition indebtedness applicable to non-exempt use assets | 2 | | |
| 3 | Subtract line 2 from line 1d | 3 | | |
| 4 | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions). | 4 | | |
| 5 | Net value of non-exempt-use assets (subtract line 4 from line 3) | 5 | | |
| 6 | Multiply line 5 by 0.035 | 6 | | |
| 7 | Recoveries of prior-year distributions | 7 | | |
| 8 | **Minimum Asset Amount** (add line 7 to line 6) | 8 | | |

| | **Section C - Distributable Amount** | | | Current Year |
|---|---|---|---|---|
| 1 | Adjusted net income for prior year (from Section A, line 8, Column A) | 1 | | |
| 2 | Enter 85% of line 1 | 2 | | |
| 3 | Minimum asset amount for prior year (from Section B, line 8, Column A) | 3 | | |
| 4 | Enter greater of line 2 or line 3 | 4 | | |
| 5 | Income tax imposed in prior year | 5 | | |
| 6 | **Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions) | 6 | | |

7 ☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)

**Schedule A (Form 990) 2022**

Page 7

Schedule A (Form 990) 2022 Page **7**

**Part V** **Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)

| | **Section D - Distributions** | | **Current Year** |
|---|---|---|---|
| 1 | Amounts paid to supported organizations to accomplish exempt purposes | 1 | |
| 2 | Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity | 2 | |
| 3 | Administrative expenses paid to accomplish exempt purposes of supported organizations | 3 | |
| 4 | Amounts paid to acquire exempt-use assets | 4 | |
| 5 | Qualified set-aside amounts (*prior IRS approval required - provide details in* ***Part VI***) | 5 | |
| 6 | Other distributions (*describe in* ***Part VI***). See instructions | 6 | |
| 7 | **Total annual distributions.** Add lines 1 through 6. | 7 | |
| 8 | Distributions to attentive supported organizations to which the organization is responsive (*provide details in* ***Part VI***). See instructions | 8 | |
| 9 | Distributable amount for 2022 from Section C, line 6 | 9 | |
| 10 | Line 8 amount divided by Line 9 amount | 10 | |

| **Section E - Distribution Allocations** (see instructions) | **(i)** **Excess Distributions** | **(ii)** **Underdistributions Pre-2022** | **(iii)** **Distributable Amount for 2022** |
|---|---|---|---|
| **1** Distributable amount for 2022 from Section C, line 6 | | | |
| **2** Underdistributions, if any, for years prior to 2022 (reasonable cause required-- *explain in* ***Part VI***). See instructions. | | | |
| **3** Excess distributions carryover, if any, to 2022: | | | |
| **a** From 2017. . . . . . . . | | | |
| **b** From 2018. . . . . . . . | | | |
| **c** From 2019. . . . . . . . | | | |
| **d** From 2020. . . . . . . . | | | |
| **e** From 2021. . . . . . . . | | | |
| **f** **Total** of lines 3a through e | | | |
| **g** Applied to underdistributions of prior years | | | |
| **h** Applied to 2022 distributable amount | | | |
| **i** Carryover from 2017 not applied (see instructions) | | | |
| **j** Remainder. Subtract lines 3g, 3h, and 3i from line 3f. | | | |
| **4** Distributions for 2022 from Section D, line 7: | | | |

| | | | |
|---|---|---|---|
| **a** Applied to underdistributions of prior years | | | |
| **b** Applied to 2022 distributable amount | | | |
| **c** Remainder. Subtract lines 4a and 4b from line 4. | | | |
| **5** Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, *explain in **Part VI***. See instructions. | | | |
| **6** Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, *explain in **Part VI***. See instructions. | | | |
| **7** **Excess distributions carryover to 2023.** Add lines 3j and 4c. | | | |
| **8** Breakdown of line 7: | | | |
| **a** Excess from 2018. . . . . | | | |
| **b** Excess from 2019. . . . . | | | |
| **c** Excess from 2020. . . . . | | | |
| **d** Excess from 2021. . . . . | | | |
| **e** Excess from 2022. . . . . | | | |

**Schedule A (Form 990)** (2022)

Page 8

Schedule A (Form 990) 2022 Page **8**

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

**Facts And Circumstances Test**

| Return Reference | Explanation |
|---|---|
| Schedule A, Part II, Line 17a 10% Facts-and-Circumstances Test | The National Geographic Society continues to qualify as a public charity demonstrated by the fact that it had over 109,000 different donors in 2022 representing a broad base of public support. It continues to have a comprehensive fundraising plan to solicit donations from the public, including other public charities, private foundations, government agencies, and corporations. In 2022, the Society's new Chief of Advancement and CEO helped increase donations by over 80%, raising the Society's support test percentage to over 31%. In addition, the Society's board is representative of a broad base of the public, including a formerly elected public official and experts in the field. No one on the board has family ties to any officer or other trustee. Except during campus renovations, the Society's museum is open to the public year-round and its library is open to the public by appointment. The Society's public lecture series in Grosvenor Auditorium offers numerous opportunities for the public to learn from, and interact with, National Geographic explorers and presenters. The Society also hosts educational workshops on campus for teachers throughout the year. The lecture series and educational workshops have also of course been affected by the campus renovations, but after the renovations are completed, the Society will be able to host even more public events. The Society also provides educational curriculum materials, lesson plans, and certification, to teachers all over the United States and beyond. In 2022, the Education Resource Library served over 3,000 pieces of content in 92.8 million pageviews to more than 46.3 million unique users. The National Geographic Society is one of the most well-known brands worldwide and is associated with scientific discovery and exploration, cultural diversity, education, storytelling, photography, and environmental conservation. |

**Schedule A (Form 990) 2022**

## Additional Data

Return to Form

efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519

**Schedule B**
**(Form 990)**
Department of the Treasury
Internal Revenue Service

# Schedule of Contributors

**▶ Attach to Form 990, 990-EZ, or 990-PF.**
**▶ Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

**2022**

| Name of the organization | **Employer identification number** |
|---|---|
| NATIONAL GEOGRAPHIC SOCIETY | 53-0193519 |

**Organization type** (check one):

| **Filers of:** | **Section:** |
|---|---|
| Form 990 or 990-EZ | ☐ 501(c)( ) (enter number) organization |
| | ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation |
| | ☐ 527 political organization |
| Form 990-PF | ☐ 501(c)(3) exempt private foundation |
| | ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation |
| | ☐ 501(c)(3) taxable private foundation |

Check if your organization is covered by the **General Rule** or a **Special Rule.**
**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the $33\frac{1}{3}$% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . . . . . . ▶ $ ____________

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.** Cat. No. 30613X **Schedule B (Form 990) (2022)**

Page 2

Schedule B (Form 990) (2022) Page **2**

Name of organization | **Employer identification number**

NATIONAL GEOGRAPHIC SOCIETY | 53-0193519

Part I
**Contributors** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
|---|---|---|---|
| RESTRICTED | , | $ RESTRICTED | Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.) |
| - | | $ | Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.) |
| - | | $ | Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.) |
| - | | $ | Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.) |
| - | | $ | Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.) |
| - | | $ | Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.) |

**Schedule B (Form 990) (2022)**



Schedule B (Form 990) (2022) Page **3**

| Name of organization | Employer identification number |
|---|---|
| NATIONAL GEOGRAPHIC SOCIETY | 53-0193519 |

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions) | (d) Date received |
|---|---|---|---|

| | | | |
|---|---|---|---|
| - | | $ | |
| **(a) No. from Part I** | **(b) Description of noncash property given** | **(c) FMV (or estimate) (See instructions)** | **(d) Date received** |
| - | | $ | |
| **(a) No. from Part I** | **(b) Description of noncash property given** | **(c) FMV (or estimate) (See instructions)** | **(d) Date received** |
| - | | $ | |
| **(a) No. from Part I** | **(b) Description of noncash property given** | **(c) FMV (or estimate) (See instructions)** | **(d) Date received** |
| - | | $ | |
| **(a) No. from Part I** | **(b) Description of noncash property given** | **(c) FMV (or estimate) (See instructions)** | **(d) Date received** |
| - | | $ | |
| **(a) No. from Part I** | **(b) Description of noncash property given** | **(c) FMV (or estimate) (See instructions)** | **(d) Date received** |
| - | | $ | |

**Schedule B (Form 990) (2022)**



Schedule B (Form 990) (2022) Page **4**

| Name of organization | **Employer identification number** |
|---|---|
| NATIONAL GEOGRAPHIC SOCIETY | 53-0193519 |

**Part III** ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once. See instructions.)** ▶ $

Use duplicate copies of Part III if additional space is needed.

| **(a) No. from Part I** | **(b) Purpose of gift** | **(c) Use of gift** | **(d) Description of how gift is held** |
|---|---|---|---|
| - | | | |
| | (e) Transfer of gift | | |
| | Transferee's name, address, and ZIP 4 | | Relationship of transferor to transferee |
| | - | | |
| **(a) No. from Part I** | **(b) Purpose of gift** | **(c) Use of gift** | **(d) Description of how gift is held** |
| - | | | |
| | (e) Transfer of gift | | |
| | Transferee's name, address, and ZIP 4 | | Relationship of transferor to transferee |
| | - | | |
| (a) | | | |

| No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| - | | | |
| | (e) Transfer of gift | | |
| | Transferee's name, address, and ZIP 4 | Relationship of transferor to transferee | |
| | | | |

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| - | | | |
| | (e) Transfer of gift | | |
| | Transferee's name, address, and ZIP 4 | Relationship of transferor to transferee | |
| | | | |

**Schedule B (Form 990) (2022)**

## Additional Data

Return to Form

**Software ID:** 22016089
**Software Version:** 2022v5.0

efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519

**SCHEDULE D** (Form 990)

Department of the Treasury
Internal Revenue Service

# Supplemental Financial Statements

▶ Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047
**2022**
Open to Public Inspection

**Name of the organization**
NATIONAL GEOGRAPHIC SOCIETY

**Employer identification number**
53-0193519

## Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

| | | (a) Donor advised funds | (b) Funds and other accounts |
|---|---|---|---|
| 1 | Total number at end of year | | |
| 2 | Aggregate value of contributions to (during year) | | |
| 3 | Aggregate value of grants from (during year) | | |
| 4 | Aggregate value at end of year | | |

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization’s property, subject to the organization’s exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

## Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (e.g., recreation or education)
☐ Preservation of an historically important land area
☐ Protection of natural habitat
☐ Preservation of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

| | | | Held at the End of the Year |
|---|---|---|---|
| a | Total number of conservation easements | 2a | |
| b | Total acreage restricted by conservation easements | 2b | |
| c | Number of conservation easements on a certified historic structure included in (a) | 2c | |
| d | Number of conservation easements included in (c) acquired after July 25, 2006, and not on a historic structure listed in the National Register | 2d | |

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶

4 Number of states where property subject to conservation easement is located ▶

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ $

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization’s financial statements that describes the organization’s accounting for conservation easements.

## Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 ▶ $

(ii) Assets included in Form 990, Part X ▶ $

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ▶ $

b Assets included in Form 990, Part X ▶ $

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** Cat. No. 52283D **Schedule D (Form 990) 2022**

Schedule D (Form 990) 2022 Page **2**

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** *(continued)*

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

a ☑ Public exhibition
b ☑ Scholarly research
c ☑ Preservation for future generations
d ☐ Loan or exchange programs
e ☐ Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?. . . ☐ Yes ☑ No

**Part IV Escrow and Custodial Arrangements.**
Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

| | | | Amount |
|---|---|---|---|
| c | Beginning balance | 1c | |
| d | Additions during the year | 1d | |
| e | Distributions during the year | 1e | |
| f | Ending balance | 1f | |

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . . ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII . . . . ☐

**Part V Endowment Funds.**
Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

| | **(a)** Current year | **(b)** Prior year | **(c)** Two years back | **(d)** Three years back | **(e)** Four years back |
|---|---|---|---|---|---|
| **1a** Beginning of year balance | 323,517,320 | 292,684,914 | 270,689,255 | 239,870,015 | 271,322,687 |
| **b** Contributions | 3,324,953 | 149,936 | 175,987 | 0 | 94,492 |
| **c** Net investment earnings, gains, and losses | -34,599,093 | 39,381,597 | 33,664,353 | 42,908,132 | -13,125,761 |
| **d** Grants or scholarships | 8,158,560 | 7,715,115 | 7,970,409 | 4,964,476 | 15,914,493 |
| **e** Other expenditures for facilities and programs | 954,674 | 878,588 | 1,300,173 | 912,042 | 605,020 |
| **f** Administrative expenses | 365,699 | 105,424 | 2,574,099 | 6,212,374 | 1,901,890 |
| **g** End of year balance | 282,764,247 | 323,517,320 | 292,684,914 | 270,689,255 | 239,870,015 |

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment ▶ 49.76 %

b Permanent endowment ▶ 27.42 %

c Term endowment ▶ 22.82 %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

| | | | Yes | No |
|---|---|---|---|---|
| | **(i)** Unrelated organizations | **3a(i)** | | No |
| | **(ii)** Related organizations | **3a(ii)** | | No |
| b | If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? | **3b** | | |

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**
Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

| Description of property | **(a)** Cost or other basis (investment) | **(b)** Cost or other basis (other) | **(c)** Accumulated depreciation | **(d)** Book value |
|---|---|---|---|---|
| **1a** Land | | 2,906,296 | | 2,906,296 |
| **b** Buildings | | 144,293,297 | 86,241,533 | 58,051,764 |
| **c** Leasehold improvements | | 1,268,000 | 1,268,000 | 0 |
| **d** Equipment | | 9,306,471 | 6,563,236 | 2,743,235 |
| **e** Other | | 26,357,393 | 984,056 | 25,373,337 |
| **Total.** Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* ▶ | | | | 89,074,632 |

**Schedule D (Form 990) 2022**

**Part VII** **Investments - Other Securities.**
Complete if the organization answered "Yes" on Form 990, Part IV, line 11b.See Form 990, Part X, line 12.

| **(a)** Description of security or category (including name of security) | **(b)** Book value | **(c)** Method of valuation: Cost or end-of-year market value |
|---|---|---|
| **(1)** Financial derivatives . . . . . . . . . . | | |
| **(2)** Closely-held equity interests . . . . . . . . . | 243,148,000 | F |
| **(3)** Other | | |
| (A) HEDGE FUNDS | 350,600,000 | F |
| (B) REAL EST.INVEST.TRUSTS | 910,000 | F |
| (C) MONEY MARKET FUNDS | 89,342,000 | F |
| (D) 100% SUB NGSP, Inc. | 24,854,130 | C |
| (E) INVESTMENT - DEFERRED COMPENSATION | 1,619,664 | F |
| (F) MORTGAGE-BACKED SECURITIES | 470,000 | F |
| (G) FIXED-INCOME OBLIGATIONS | 249,926,000 | F |
| (H) COMMODITIES | 28,918,000 | F |
| (I) Other Direct Investments | 40,691,746 | C |
| **Total.** *(Column (b) must equal Form 990, Part X, col. (B) line 12.)* ▶ | 1,030,479,540 | |

**Part VIII** **Investments - Program Related.**
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

| **(a)** Description of investment | **(b)** Book value | **(c)** Method of valuation: Cost or end-of-year market value |
|---|---|---|
| **(1)** | | |
| **(2)** | | |
| **(3)** | | |
| **(4)** | | |
| **(5)** | | |
| **(6)** | | |
| **(7)** | | |
| **(8)** | | |
| **(9)** | | |
| **Total.** *(Column (b) must equal Form 990, Part X, col.(B) line 13.)* ▶ | | |

**Part IX** **Other Assets.**
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

| **(a)** Description | **(b)** Book value |
|---|---|
| **(1)** | |
| **(2)** | |
| **(3)** | |
| **(4)** | |
| **(5)** | |
| **(6)** | |
| **(7)** | |
| **(8)** | |
| **(9)** | |
| **Total.** *(Column (b) must equal Form 990, Part X, col.(B) line 15.)* . . . . . . . . . . . ▶ | |

**Part X** **Other Liabilities.**
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f.See Form 990, Part X, line 25.

| **1.** **(a)** Description of liability | **(b)** Book value |
|---|---|
| **(1)** Federal income taxes | |
| PENSION/POSTRETIREMENT BENEFITS | [illegible] |

| | |
|---|---|
| PENSION/POSTRETIREMENT BENEFITS | 18,601,233 |
| CHARITABLE GIFT ANNUITIES | 10,167,913 |
| DEFERRED COMPENSATION | 1,619,664 |
| TRUSTEE EMERITUS PAYABLE | 37,198 |
| Due to Affiliate | 0 |
| Refundable advances | 10,754,627 |
| OTHER | 31,488 |
| | |
| | |
| **Total.** *(Column (b) must equal Form 990, Part X, col.(B) line 25.)* ▶ | 41,212,123 |

**2.** Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII ☐

**Schedule D (Form 990) 2022**

Page 4

Schedule D (Form 990) 2022 Page **4**

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

| | | | | | |
|---|---|---|---|---|---|
| 1 | Total revenue, gains, and other support per audited financial statements | | | 1 | |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12: | | | | |
| a | Net unrealized gains (losses) on investments | 2a | | | |
| b | Donated services and use of facilities | 2b | | | |
| c | Recoveries of prior year grants | 2c | | | |
| d | Other (Describe in Part XIII.) | 2d | | | |
| e | Add lines **2a** through **2d** | | | 2e | |
| 3 | Subtract line **2e** from line **1** | | | 3 | |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line **1**: | | | | |
| a | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | | | |
| b | Other (Describe in Part XIII.) | 4b | | | |
| c | Add lines **4a** and **4b** | | | 4c | |
| 5 | Total revenue. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12.) | | | 5 | |

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

| | | | | | |
|---|---|---|---|---|---|
| 1 | Total expenses and losses per audited financial statements | | | 1 | |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25: | | | | |
| a | Donated services and use of facilities | 2a | | | |
| b | Prior year adjustments | 2b | | | |
| c | Other losses | 2c | | | |
| d | Other (Describe in Part XIII.) | 2d | | | |
| e | Add lines **2a** through **2d** | | | 2e | |
| 3 | Subtract line **2e** from line **1** | | | 3 | |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line **1:** | | | | |
| a | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | | | |
| b | Other (Describe in Part XIII.) | 4b | | | |
| c | Add lines **4a** and **4b** | | | 4c | |
| 5 | Total expenses. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18.) | | | 5 | |

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

| Return Reference | Explanation |
|---|---|
| Schedule D, Part III, Line 4 Collections of art - description of collections | The Society's image collection contains illustrations, photographic negatives and digital files taken over the past 130+ years by photographers on assignment for the Society. The museum also maintains artifacts donated to or collected by the Society over its 130+ year history. A rare book collection of approximately 1,300 volumes covering topics such as natural history, polar history and climate, and the history of early travel and exploration is maintained within the Society's research and reference library. This collection is made available to scholars and researchers. |
| Schedule D, Part V, Line 4 Intended uses of endowment funds | Fund for Exploration--to be used to support research, exploration and conservation. Buffet Funds--to be used to support conservation in Africa and Latin America. Foundation Funds--to be used to support geography education. |

**Schedule D (Form 990) 2022**

## Additional Data

Return to Form

**Software ID:** 22016089
**Software Version:** 2022v5.0

efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519

**SCHEDULE F (Form 990)**

Department of the Treasury
Internal Revenue Service

# Statement of Activities Outside the United States

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.
▶ Attach to Form 990.
▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047

**2022**

Open to Public Inspection

Name of the organization
NATIONAL GEOGRAPHIC SOCIETY

**Employer identification number**
53-0193519

**Part I** **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

**1** **For grantmakers.** Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . . . . ☑ **Yes** ☐ **No**

**2** **For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

**3** Activites per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

| **(a)** Region | **(b)** Number of offices in the region | **(c)** Number of employees, agents, and independent contractors in the region | **(d)** Activities conducted in region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region) | **(e)** If activity listed in (d) is a program service, describe specific type of service(s) in the region | **(f)** Total expenditures for and investments in the region |
|---|---|---|---|---|---|
| Central America and the Caribbean | 0 | 0 | Program Services | Royalties, fees for service | 2,992,859 |
| East Asia and the Pacific | 1 | 1 | Program Services | Royalties, fees for service | 624,073 |
| Europe (Including Iceland and Greenland) | 0 | 0 | Program Services | Royalties, fees for service | 5,251,936 |
| Middle East and North Africa | 0 | 0 | Program Services | Royalties, fees for service | 349,722 |
| North America (Canada Mexico only) | 0 | 0 | Program Services | Royalties, fees for service | 5,020,114 |
| Russia and Neighboring States | 0 | 0 | Program Services | Royalties, fees for service | 2,600 |
| South America | 0 | 0 | Program Services | Royalties, fees for service | 2,491,437 |
| South Asia | 0 | 0 | Program Services | Royalties, fees for service | 37,764 |
| Sub-Saharan Africa | 0 | 0 | Program Services | Royalties, fees for service | 2,407,886 |
| Central America and the Caribbean | 0 | 0 | Grantmaking | | 60,800 |
| East Asia and the Pacific | 0 | 2 | Grantmaking | | 1,618,320 |
| Europe (Including Iceland and Greenland) | 0 | 0 | Grantmaking | | 4,289,567 |
| Middle East and North Africa | 0 | 0 | Grantmaking | | 249,716 |
| North America (Canada Mexico only) | 0 | 0 | Grantmaking | | 1,147,006 |
| Russia and Neighboring States | 0 | 0 | Grantmaking | | 157,875 |
| South America | 0 | 0 | Grantmaking | | 4,578,803 |
| South Asia | 0 | 0 | Grantmaking | | 757,382 |
| Sub-Saharan Africa | 0 | 1 | Grantmaking | | 6,281,551 |
| East Asia and the Pacific | 0 | 0 | Investments | | 267,883,927 |
| Europe (Including Iceland and Greenland) | 0 | 0 | Investments | | 248,378,205 |
| North America (Canada Mexico only) | 0 | 0 | Investments | | 24,499,760 |
| South America | 0 | 0 | Investments | | 14,077,524 |
| Central America and the Caribbean | 0 | 0 | Investments | | 23,776,531 |
| Middle East and North Africa | 0 | 0 | Investments | | 2,335,748 |
| Russia and Neighboring States | 0 | 0 | Investments | | 2,587,403 |
| South Asia | 0 | 0 | Investments | | 16,820,800 |
| Sub-Saharan Africa | 0 | 0 | Investments | | 12,174,096 |
| **3a** Sub-total . . . | 1 | 3 | | | 31,280,478 |
| **b** Total from continuation sheets to Part I . . . | 0 | 1 | | | 619,572,927 |
| **c Totals** (add lines 3a and 3b) | 1 | 4 | | | 650,853,405 |

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** Cat. No. 50082W **Schedule F (Form 990) 2022**

Page 2

Schedule F (Form 990) 2022 Page **2**

**Part II** **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than $5,000. Part II can be duplicated if additional space is needed.

| **1** **(a)** Name of organization | **(b)** IRS code section and EIN (if applicable) | **(c)** Region | **(d)** Purpose of grant | **(e)** Amount of cash grant | **(f)** Manner of cash disbursement | **(g)** Amount of noncash assistance | **(h)** Description of noncash assistance | **(i)** Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | South America | Grant | 348,918 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Grant | 651,600 | WIRE | | | |
| | | East Asia and the Pacific | Grant | 71,495 | WIRE | | | |
| | | East Asia and the Pacific | Grant | 44,818 | WIRE | | | |
| | | East Asia and the Pacific | Level II | 13,756 | WIRE | | | |
| | | East Asia and the Pacific | Level II | 32,964 | WIRE | | | |
| | | East Asia and the Pacific | Level II | 100,000 | WIRE | | | |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | East Asia and the Pacific | Level I | 18,735 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 32,718 | WIRE | | | |
| | | South America | Grant | 1,808,958 | WIRE | | | |
| | | Sub-Saharan Africa | Level I | 19,950 | WIRE | | | |
| | | Middle East and North Africa | Level I | 17,243 | WIRE | | | |
| | | Middle East and North Africa | Level II | 100,000 | WIRE | | | |
| | | Middle East and North Africa | Level II | 100,000 | WIRE | | | |
| | | Middle East and North Africa | Level II | 100,000 | WIRE | | | |
| | | Middle East and North Africa | Level I | 19,820 | WIRE | | | |
| | | East Asia and the Pacific | Level I | 19,980 | WIRE | | | |
| | | South America | Level II | 48,000 | WIRE | | | |
| | | South America | Research | 5,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 20,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 21,450 | WIRE | | | |
| | | South America | Research | 5,000 | WIRE | | | |
| | | Sub-Saharan Africa | Level I | 19,627 | WIRE | | | |
| | | Sub-Saharan Africa | Level II | 97,800 | WIRE | | | |
| | | Sub-Saharan Africa | Level II | 77,550 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 100,000 | WIRE | | | |
| | | Sub-Saharan Africa | Level II | 90,059 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 19,188 | WIRE | | | |
| | | East Asia and the Pacific | Level I | 19,941 | WIRE | | | |
| | | East Asia and the Pacific | Level I | 20,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 20,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 100,000 | WIRE | | | |
| | | South Asia | Grant | 90,850 | WIRE | | | |
| | | South Asia | Level I | 19,629 | WIRE | | | |
| | | South Asia | Level II | 91,346 | WIRE | | | |
| | | East Asia and the Pacific | Grant | 150,000 | WIRE | | | |
| | | Middle East and North Africa | Level II | 99,625 | WIRE | | | |
| | | Middle East and North Africa | Grant | 99,880 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 28,700 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 20,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Grant | 88,819 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 20,000 | WIRE | | | |
| | | Sub-Saharan Africa | Level I | 20,000 | WIRE | | | |
| | | Sub-Saharan Africa | Level II | 89,828 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 350,000 | WIRE | | | |
| | | North America (Canada Mexico only) | Level I | 20,000 | WIRE | | | |
| | | North America (Canada Mexico only) | Grant | 97,175 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 11,481 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 53,093 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 19,500 | WIRE | | | |
| | | South Asia | Level I | 20,000 | WIRE | | | |
| | | Central America and the Caribbean | Level I | 20,000 | WIRE | | | |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | East Asia and the Pacific | Grant | 49,215 | WIRE | | | |
| | | East Asia and the Pacific | Level I | 19,806 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 19,928 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 1,203,038 | WIRE | | | |
| | | East Asia and the Pacific | Grant | 100,050 | WIRE | | | |
| | | Sub-Saharan Africa | Level I | 19,984 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 100,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 19,620 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Grant | 88,791 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 17,947 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Grant | 149,926 | WIRE | | | |
| | | Central America and the Caribbean | Grant | 84,773 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 856,137 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 98,691 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 99,064 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 20,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 98,713 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 99,264 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 19,886 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 98,220 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 19,231 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level II | 100,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Level I | 19,948 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 50,000 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 50,000 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 50,000 | WIRE | | | |
| | | Sub-Saharan Africa | Award | 25,000 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Freshwater Initiative | 556,602 | WIRE | | | |
| | | Europe (Including Iceland and Greenland) | Perpetual Planet | 199,928 | WIRE | | | |
| | | Sub-Saharan Africa | Grant | 825,000 | WIRE | | | |

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter . . . . . . . . ▶ 82

3 Enter total number of other organizations or entities . . . . . . . . . . . . . . . . . . . . . . . . . . ▶ 0

**Schedule F (Form 990) 2022**

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**Part III** **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16. Part III can be duplicated if additional space is needed.

| **(a)** Type of grant or assistance | **(b)** Region | **(c)** Number of recipients | **(d)** Amount of cash grant | **(e)** Manner of cash disbursement | **(f)** Amount of noncash assistance | **(g)** Description of noncash assistance | **(h)** Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|
| Grant | East Asia and the Pacific | 13 | 1,063,257 | WIRE | | | |
| Grant | Europe (Including Iceland and Greenland) | 35 | 2,365,855 | WIRE | | | |
| Grant | Middle East and North Africa | 3 | 109,280 | WIRE | | | |
| Grant | North America (Canada Mexico only) | 11 | 291,169 | WIRE | | | |
| Grant | Russia and Neighboring States | 5 | 157,875 | WIRE | | | |
| Grant | South America | 26 | 2,140,624 | WIRE | | | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Grant | South Asia | 17 | 628,656 | WIRE | | | |
| Grant | Sub-Saharan Africa | 26 | 1,642,000 | WIRE | | | |
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**Part IV Foreign Forms**

1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)* . . . ☑ Yes ☐ No

2 Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)* . . . ☐ Yes ☑ No

3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with Respect to Certain Foreign Corporations. (see Instructions for Form 5471)* . . . ☐ Yes ☑ No

4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see Instructions for Form 8621)* . ☑ Yes ☐ No

5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with Respect to Certain Foreign Partnerships (see Instructions for Form 8865)* . . . ☑ Yes ☐ No

6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990).* . . . ☐ Yes ☑ No

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**Part V Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

| ReturnReference | Explanation |
|---|---|
| Schedule F, Part I, Line 2 Procedures for monitoring use of grant funds | The National Geographic Society FUNDS GRANTS ACROSS THE FIELDS OF CONSERVATION, EDUCATION, RESEARCH, STORYTELLING AND TECHNOLOGY. GRANT PROPOSALS ARE REVIEWED BY NATIONAL GEOGRAPHIC STAFF EXPERTS, AN EXTERNAL PANEL OF GLOBAL SUBJECT MATTER EXPERTS AND AN EXECUTIVE COMMITTEE WHO RECOMENDS GRANTS FOR APPROVAL. When outside expertise is required to meet the impact objectives of a specific program, we often award grants outside of the grants committee process. Any grants awarded outside of the grants committee pipeline are considered "External Project Funding." Such grants are subject to an internal review process that evaluates the expertise of the grantee, the methodology for executing the work, and the overall contribution to programmatic objectives. Once the grantee is selected, the entire project - including grant funding - is submitted for approval by the NGS senior team through the "Spend Approval Process." Grants approved through this process are subject to reporting requirements above and beyond those required of standard grantees. THE GRANT RECIPIENTS ARE REQUIRED TO SIGN A GRANT AGREEMENT AND SUBMIT REPORTING INCLUDING A FINANCIAL ACCOUNTING OF FUNDS SPENT TO ENSURE THAT THE GRANT FUNDS ARE PROPERLY USED AND ACCOUNTED FOR. THE FOLLOWING IS A DETAILED DESCRIPTION: WHEN A NATIONAL GEOGRAPHIC SOCIETY GRANT APPLICATION HAS BEEN APPROVED, PAYMENT IS ISSUED ONCE THE SOCIETY HAS RECEIVED THE FOLLOWING COMPLETED, SIGNED DOCUMENTS FROM THE GRANTEE: 1) APPROPRIATE TAX FORM. ALL GRANTEES WHO ARE NOT US CITIZENS ARE REQUIRED TO SIGN AND SUBMIT THE APPROPRIATE TAX FORM (FORM W-8) FOR WORK CONDUCTED WHOLLY OUTSIDE THE US. 2) GRANT AGREEMENT. ALL GRANTEES MUST COMPLETE AND SIGN A GRANT AGREEMENT, WHICH INCLUDES DUE DATES FOR RESEARCH REPORTS AND FINANCIAL REPORTS (GENERALLY DUE WITHIN SIX MONTHS OF COMPLETION OF THE FIELD WORK.) BY SIGNING THE GRANT AGREEMENT, THE GRANTEE AGREES TO SUBMIT A FINAL NARRATIVE REPORT AND A FINANCIAL ACCOUNTING OF THE GRANT MONIES SPENT BEFORE THE INDICATED SUBMISSION DEADLINE. GRANTEES ALSO CERTIFY TO PARAGRAPHS 16 17 (COPIED BELOW) THAT THEY WILL NOT PROMOTE TERRORISM AND WILL COMPLY WITH FOREIGN TRADE CONTROLS: 17. CERTIFICATION. BY COUNTERSIGNING THIS AGREEMENT, YOU CERTIFY THAT YOUR ORGANIZATION DOES NOT AND WILL NOT PROMOTE OR ENGAGE IN VIOLENCE OR TERRORISM, NOR WILL YOUR ORGANIZATION MAKE SUB-GRANTS OR OTHER PAYMENTS TO ANY ENTITY THAT ENGAGES IN SUCH ACTIVITIES. 17 U.S. FOREIGN TRADE CONTROLS. BY COUNTERSIGNING THIS AGREEMENT, I OR GRANTEE ACKNOWLEDGE THAT I AM AWARE OF, AND AGREE TO COMPLY FULLY WITH, U.S. FOREIGN TRADE CONTROLS THAT GOVERN TRAVEL TO, AND TRANSACTIONS WITH, COUNTRIES SUCH AS CUBA, IRAN, SUDAN, SYRIA, NORTH KOREA, CRIMEA TERRITORY, AND OTHER U.S.-SANCTIONED COUNTRIES, INCLUDING ANY SUCH CONTROLS THAT MAY BE IMPOSED IN THE FUTURE DURING THE PERIOD OF THE GRANT. SPECIFICALLY, I ACKNOWLEDGE THAT I AM AWARE OF AND AGREE TO COMPLY WITH THE REGULATIONS OF THE U.S. DEPARTMENT OF THE TREASURY GOVERNING TRAVEL TO AND TRADE |

| | |
|---|---|
| | WITH COUNTRIES SUBJECT TO U.S. ECONOMIC SANCTIONS (31 CODE OF FEDERAL REGULATIONS PARTS 500-598) AND ALSO WITH THE EXPORT ADMINISTRATION REGULATIONS OF THE U.S. DEPARTMENT OF COMMERCE (15 CODE OF FEDERAL REGULATIONS PARTS 730-774). I ALSO AGREE THAT, BEFORE ANY FUNDS ARE DISBURSED UNDER THIS GRANT, I WILL PROVIDE THE SOCIETY WITH COPIES OF ANY AUTHORIZATIONS FROM THE U.S. TREASURY DEPARTMENT'S OFFICE OF FOREIGN ASSETS CONTROL ("OFAC") NECESSARY TO CARRY OUT THE GRANT, OR COPIES OF CORRESPONDENCE FROM OFAC CONFIRMING THAT NO SPECIFIC AUTHORIZATIONS ARE NECESSARY. I ALSO REPRESENT AND WARRANT TO THE SOCIETY THAT IN SEEKING AUTHORIZATIONS FROM OFAC AND/OR CONFIRMATION THAT NO SUCH AUTHORIZATIONS ARE NECESSARY, I FULLY DISCLOSED THE NATURE OF THE GRANT AND ITS PARTICIPANTS AND IDENTIFIED THE SOCIETY AS A SOURCE OF FUNDING. I ALSO AGREE THAT I WILL KEEP ALL NECESSARY RECORDS TO SHOW THAT I HAVE COMPLIED WITH U.S. FOREIGN TRADE CONTROLS. FINALLY, I ACKNOWLEDGE THAT I HAVE BEEN ADVISED BY THE SOCIETY TO CONSULT WITH MY OWN LEGAL COUNSEL IN CONNECTION WITH MY OBLIGATIONS UNDER U.S. FOREIGN TRADE CONTROLS.GRANTEES ARE REQUIRED TO SUBMIT A CERTIFICATION RELATED TO ETHICAL ISSUES AND THAT THE GRANTEE IS IN COMPLIANCE WITH APPLICABLE ANTI-CORRUPTION LAWS;THEY ALSO CERTIFY THAT THEY HAVE THE PROPER PERMITS TO UNDERTAKE THE PROPOSED FIELD RESEARCH IN THE COUNTRY IN WHICH IT WILL BE CONDUCTED AND THAT NO IMPROPER PAYMENTS OF ANY VALUE HAVE BEEN MADE DURING THE PROCESS OF OBTAINING SUCH PERMITS. ADDITIONALLY, GRANTEES AFFILIATED WITH GOVERNMENT AGENCIES OR PUBLIC INSTITUTIONS ARE SCREENED IN ORDER TO IDENTIFY AND AVOID POTENTIAL CONFLICTS OF INTEREST INVOLVING THE GRANTEE'S OFFICIAL JOB DUTIES AND THE SOCIETY. THE SOCIETY'S FINANCIAL ACCOUNTS PAYABLE SYSTEM ALSO REVIEWS FOR COMPLIANCE WITH FINANCIAL SANCTIONS LIST (THE SDN LIST) COMPLIED AND MAINTAINED BY THE U.S. TREASURY UPON NEW VENDOR SET-UP AND PRIOR TO EACH PAYMENT. ONCE PAYMENT IS ISSUED, IF GRANTEES WOULD LIKE TO ALTER THEIR PROPOSED BUDGET IN ANY WAY THEY MUST SUBMIT THEIR REQUEST TO THE PROGRAM OFFICER. THE REQUEST IS APPROVED OR DENIED AND A RECORD OF THE CHANGE IS ADDED TO THE GRANT FILE. THE GRANTEE MUST SUBMIT THEIR FINAL REPORT AND FINANCIAL ACCOUNTING BEFORE THE DEADLINE INDICATED IN THEIR GRANT AGREEMENT UNLESS AN EXTENSION HAS BEEN REQUESTED IN WRITING AND APPROVED BY THE PROGRAM OFFICER. THE FINANCIAL ACCOUNTING PROVIDES A BREAKDOWN OF THE ACTUAL COSTS OF THE PROJECT AND IS EXPECTED TO PARALLEL THE COSTS PROJECTED IN THE ORIGINAL GRANT APPLICATION BUDGET; ALL DISCREPANCIES MUST BE EXPLAINED. IF THERE ARE UN-EXPENDED GRANT MONIES THEY MUST BE RETURNED TO THE SOCIETY. THE REPORTS COORDINATOR REVIEWS THE FINAL REPORT AND FINANCIAL ACCOUNTING FOR COMPLETENESS AND THEN CIRCULATES BOTH REPORTS TO THE PROGRAM OFFICERS FINAL REVIEW AND APPROVAL. ONCE THE REPORTS ARE APPROVED, THE GRANT IS CLOSED. AN ELECTRONIC COPY OF THE GRANT FILE IS RETAINED, in accordance with the Society's document retention policy, BY THE GRANT OPERATIONS STAFF, WHICH IS THE OFFICIAL REPOSITORY FOR ALL GRANTS RELATED DOCUMENTATION. |
| Schedule F, Part I, Line 3 Method used to account for expenditures on org's financial statements | CENTRAL AMERICA AND THE CARIBBEAN-Accrual; EAST ASIA AND THE PACIFIC-Accrual; EUROPE (INCLUDING ICELAND AND GREENLAND)-Accrual; MIDDLE EAST AND NORTH AFRICA-Accrual; NORTH AMERICA (CANADA MEXICO ONLY)-Accrual; RUSSIA AND NEIGHBORING STATES-Accrual; SOUTH AMERICA-Accrual; SOUTH ASIA-Accrual; SUB-SAHARAN AFRICA-Accrual |
| Schedule F, Part II, Line 1 Method used to account for expenditures on org's financial statements | CENTRAL AMERICA AND THE CARIBBEAN-Accrual; EAST ASIA AND THE PACIFIC-Accrual; EUROPE (INCLUDING ICELAND AND GREENLAND)-Accrual; MIDDLE EAST AND NORTH AFRICA-Accrual; NORTH AMERICA (CANADA MEXICO ONLY)-Accrual; SOUTH AMERICA-Accrual; SOUTH ASIA-Accrual; SUB-SAHARAN AFRICA-Accrual |
| Schedule F, Part III Method used to account for expenditures on org's financial statements | EAST ASIA AND THE PACIFIC -Accrual EUROPE (INCLUDING ICELAND AND GREENLAND) -Accrual MIDDLE EAST AND NORTH AFRICA -Accrual NORTH AMERICA (CANADA MEXICO ONLY) -Accrual RUSSIA AND NEIGHBORING STATES -Accrual SOUTH AMERICA -Accrual SOUTH ASIA -Accrual SUB-SAHARAN AFRICA -Accrual |

**Schedule F (Form 990) 2022**

## Additional Data

**Software ID:** 22016089
**Software Version:** 2022v5.0

efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519

**SCHEDULE G (Form 990)**

Department of the Treasury
Internal Revenue Service

# Supplemental Information Regarding Fundraising or Gaming Activities

**Complete if the organization answered "Yes" on Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.**
**▶Attach to Form 990 or Form 990-EZ.**
**▶Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

Name of the organization
NATIONAL GEOGRAPHIC SOCIETY

**Employer identification number**
53-0193519

**Part I** **Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

**1** Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- **a** ☑ Mail solicitations
- **b** ☑ Internet and email solicitations
- **c** ☑ Phone solicitations
- **d** ☑ In-person solicitations
- **e** ☑ Solicitation of non-government grants
- **f** ☑ Solicitation of government grants
- **g** ☑ Special fundraising events

**2a** Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☑ **Yes** ☐ **No**

**b** If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

| **(i)** Name and address of individual or entity (fundraiser) | **(ii)** Activity | **(iii)** Did fundraiser have custody or control of contributions? Yes | No | **(iv)** Gross receipts from activity | **(v)** Amount paid to (or retained by) fundraiser listed in col. **(i)** | **(vi)** Amount paid to (or retained by) organization |
|---|---|---|---|---|---|---|
| Avalon Consulting Group Inc<br>805 15 St NW<br>Washington, DC 20005 | Fundraising Consultant | | No | 1,616,313 | 519,284 | 1,097,029 |
| HBP Inc<br>952 Frederick St<br>Hagerstown, MD 21740 | Fundraising Consultant | | No | 2,054,757 | 1,565,332 | 489,425 |
| The Production Management Group LTD<br>7160 Columbia Gateway Dr<br>Columbia, MD 21046 | Fundraising Consultant | | No | 2,932,330 | 1,121,557 | 1,810,773 |
| LAKE GROUP MEDIA INC<br>PO Box 22106<br>New York, NY 100872106 | FUNDRAISING CONSULTANT | | No | 2,050,506 | 435,526 | 1,614,980 |
| Community Counseling Service CO LLC<br>PO Box 824885<br>Philadelphia, PA 191824485 | Fundraising Consultant | | No | 57,567,877 | 463,181 | 57,104,696 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| **Total** . . . . . . . . . . . . . . . . . . . . ▶ | | | | 66,221,783 | 4,104,880 | 62,116,903 |

**3** List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

AL, AK, AZ, AR, CA, CO, CT, DE, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY

**For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.** Cat. No. 50083H **Schedule G (Form 990) 2022**

Page 2

Schedule G (Form 990) 2022 Page **2**

**Part II** **Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

| | | **(a)** Event #1 (event type) | **(b)** Event #2 (event type) | **(c)** Other events (total number) | **(d)** Total events (add col. **(a)** through col. **(c)**) |
|---|---|---|---|---|---|
| Revenue | 1 Gross receipts | | | | |
| | 2 Less: Contributions | | | | |
| | 3 Gross income (line 1 minus line 2) | | | | |
| Direct Expenses | 4 Cash prizes | | | | |
| | 5 Noncash prizes | | | | |
| | 6 Rent/facility costs | | | | |
| | 7 Food and beverages | | | | |
| | 8 Entertainment | | | | |
| | 9 Other direct expenses | | | | |
| | 10 Direct expense summary. Add lines 4 through 9 in column (d) ▶ | | | | |
| | 11 Net income summary. Subtract line 10 from line 3, column (d) ▶ | | | | |

**Part III** **Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

| | | **(a)** Bingo | **(b)** Pull tabs/Instant bingo/progressive bingo | **(c)** Other gaming | **(d)** Total gaming (add col. **(a)** through col. **(c)**) |
|---|---|---|---|---|---|
| Revenue | 1 Gross revenue | | | | |
| Direct Expenses | 2 Cash prizes | | | | |
| | 3 Noncash prizes | | | | |
| | 4 Rent/facility costs | | | | |
| | 5 Other direct expenses | | | | |
| | 6 Volunteer labor | ☐ **Yes** ______ % ☐ **No** | ☐ **Yes** ______ % ☐ **No** | ☐ **Yes** ______ % ☐ **No** | |
| | 7 Direct expense summary. Add lines 2 through 5 in column (d) ▶ | | | | |
| | 8 Net gaming income summary. Subtract line 7 from line 1, column (d) ▶ | | | | |

9 Enter the state(s) in which the organization conducts gaming activities: ____________

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain:

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain:

Schedule G (Form 990) 2022

Page 3

Schedule G (Form 990) 2022 Page **3**

11 Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No

13 Indicate the percentage of gaming activity conducted in:

| | | |
|---|---|---|
| a The organization's facility | **13a** | % |
| b An outside facility | **13b** | % |

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶

Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization ▶ $ ________ and the amount of gaming revenue retained by the third party ▶ $ ________.

c If "Yes," enter name and address of the third party:

Name ▶

Address ▶

16 Gaming manager information:

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $

**Part IV** **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

| Return Reference | Explanation |
|---|---|
| Schedule G, Part I, Line 2b(v) payment of fees or payment of expenses | HBP, INC.-NGS REIMBURSED VENDOR AN ADDITIONAL $966,140 FOR PAPER, POSTAGE, AND MAILSHOP SERVICES;THE PRODUCTION MANAGEMENT GROUP LTD-NGS ALSO PAID VENDOR AN ADDITIONAL $1,312,270 FOR PAPER, POSTAGE, AND MAILSHOP SERVICES; |

Schedule G (Form 990) 2022

## Additional Data

Return to Form

**Software ID:** 22016089

efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

**Schedule I (Form 990)**

Department of the Treasury
Internal Revenue Service

# Grants and Other Assistance to Organizations, Governments and Individuals in the United States

**Complete if the organization answered "Yes," on Form 990, Part IV, line 21 or 22.**
**▶ Attach to Form 990.**
**▶ Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047
**2022**
Open to Public Inspection

| Name of the organization | Employer identification number |
|---|---|
| NATIONAL GEOGRAPHIC SOCIETY | 53-0193519 |

**Part I General Information on Grants and Assistance**

**1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . . . . . . . . . . . . . . . . . . . ☑ **Yes** ☐ **No**

**2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than $5,000. Part II can be duplicated if additional space is needed.

| **(a)** Name and address of organization or government | **(b)** EIN | **(c)** IRC section (if applicable) | **(d)** Amount of cash grant | **(e)** Amount of non-cash assistance | **(f)** Method of valuation (book, FMV, appraisal, other) | **(g)** Description of noncash assistance | **(h)** Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| (1) African Aquatic Conservation Fund | 47-2592641 | 501(C)(3) | 61,180 | 0 | FMV | | Research Grant |
| (2) Alaska Whale Foundation | 91-1712495 | 501(C)(3) | 99,663 | 0 | FMV | | Research Grant |
| (3) Ancient Art Archive | 81-3731021 | 501(C)(3) | 100,000 | 0 | FMV | | Research Grant |
| (4) Ancient Egypt Research Assoc | 36-3325468 | 501(C)(3) | 75,000 | 0 | FMV | | Research Grant |
| (5) Andrews University | 38-1627600 | 501(C)(3) | 20,000 | 0 | FMV | | Research Grant |
| (6) Appalachian State University | 56-1176030 | 501(C)(3) | 163,204 | 0 | FMV | | Perpetual Planet-Mountains Expedition |
| (7) The Aspen Institute | 84-0399006 | 501(C)(3) | 150,000 | 0 | FMV | | Sponsorship |
| (8) Arizona State University | 86-0196696 | 501(C)(3) | 70,562 | 0 | FMV | | Perpetual Planet-Amazon |
| (9) Aurora Lights | 54-1942427 | 501(C)(3) | 18,276 | 0 | FMV | | Education Grant |
| (10) Blue Grass Community Foundation | 61-6053466 | 501(C)(3) | 207,250 | 0 | FMV | | Azimuth Grant |
| (11) Chesapeake Bay Foundation | 52-6065757 | 501(C)(3) | 120,357 | 0 | FMV | | Education Grant |
| (12) Children's Environmental Literacy Foundation | 36-4540146 | 501(C)(3) | 30,000 | 0 | FMV | | Education Grant |
| (13) Conservation Through Public Health | 37-1455761 | 501(C)(3) | 100,000 | 0 | FMV | | Research Grant |
| (14) Consortium of Okla Geographers | 73-1310147 | 501(C)(3) | 44,907 | 0 | FMV | | Education Grant |
| (15) Critical Ecology Lab | 94-2524840 | 501(C)(3) | 50,000 | 0 | FMV | | Wayfinder Award |
| (16) Denver Museum of Nature Science | 84-0518447 | 501(C)(3) | 100,000 | 0 | FMV | | Research Grant |
| (17) Duke University | 56-0532129 | 501(C)(3) | 15,712 | 0 | FMV | | Research Grant |
| (18) Earth Species Project | 82-5167508 | 501(C)(3) | 100,000 | 0 | FMV | | Research Grant |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| (19) Friends of Fossil Forests | 92-2845383 | 501(C)(3) | 150,000 | 0 | FMV | | Meridian Grant |
| (20) Friends of the Osa | 81-0621147 | 501(C)(3) | 191,726 | 0 | FMV | | Perpetual Planet-Rainforest |
| (21) George Mason University | 54-0836354 | 501(C)(3) | 19,985 | 0 | FMV | | Research Grant |
| (22) Global Fishing Watch | 81-5461345 | 501(C)(3) | 125,000 | 0 | FMV | | Pristine Seas |
| (23) Hamilton County EducSrvCtr | 31-0967612 | 501(C)(3) | 78,098 | 0 | FMV | | Education Grant |
| (24) The Home Collective | 86-2062428 | 501(C)(3) | 20,000 | 0 | FMV | | Research Grant |
| (25) Island Conservation | 91-1839907 | 501(C)(3) | 19,771 | 0 | FMV | | Research Grant |
| (26) Lincoln Hills Cares | 81-4552726 | 501(C)(3) | 24,500 | 0 | FMV | | Education Grant |
| (27) Massachusetts Institute of Technology | 04-2103594 | 501(C)(3) | 25,000 | 0 | FMV | | EXTECH Conservation |
| (28) Marine Conservation Institute | 91-1725640 | 501(C)(3) | 10,000 | 0 | FMV | | Pristine Seas |
| (29) Metropolitan State University | 41-1687554 | 501(C)(3) | 7,650 | 0 | FMV | | Education Grant |
| (30) Migramar | 82-2737816 | 501(C)(3) | 89,985 | 0 | FMV | | Research Grant |
| (31) Minnesota Dept of Education | 00-4405717 | 501(C)(1) | 41,325 | 0 | FMV | | Education Grant |
| (32) Nebraska Children and Families Foundation | 91-1829974 | 501(C)(3) | 39,685 | 0 | FMV | | Education Grant |
| (33) New York Botanical Garden | 13-1693134 | 501(C)(3) | 19,972 | 0 | FMV | | Research Grant |
| (34) Oregon State University | 61-1730890 | 501(C)(3) | 98,550 | 0 | FMV | | Research Grant |
| (35) Privateer Space | 86-3656294 | 501(C)(3) | 140,000 | 0 | FMV | | Research Grant |
| (36) Public Allies | 52-1759564 | 501(C)(3) | 73,000 | 0 | FMV | | Education Grant |
| (37) Reserva The Youth Land Trust | 84-2906892 | 501(C)(3) | 5,000 | 0 | FMV | | Campaign for Nature |
| (38) Resources Legacy Fund | 95-4703838 | 501(C)(3) | 100,600 | 0 | FMV | | Campaign for Nature |
| (39) Rozalia Project | 27-2274099 | 501(C)(3) | 32,739 | 0 | FMV | | Meridian Grant |
| (40) Rosedale Community Youth Ctr | 47-2747371 | 501(C)(3) | 15,675 | 0 | FMV | | Education Grant |
| (41) Southern Illinois University | 37-6005961 | 501(C)(3) | 100,000 | 0 | FMV | | Research Grant |
| (42) Southern Regional Education Board | 58-0566141 | 501(C)(3) | 98,369 | 0 | FMV | | Education Grant |
| (43) SR3 SeaLife | 45-1491069 | 501(C)(3) | 5,000 | 0 | FMV | | Research Grant |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| (43) SRS SeaLife | [illegible] | 501(C)(3) | 5,000 | 0 | FMV | | Research Grant |
| (44) Stanford University | 94-1156365 | 501(C)(3) | 100,000 | 0 | FMV | | Research Grant |
| (45) Strong TIES | 47-3868079 | 501(C)(3) | 12,635 | 0 | FMV | | Education Grant |
| (46) TAPI Story | 83-0599656 | 501(C)(3) | 20,000 | 0 | FMV | | Research Grant |
| (47) Texas AM University | 74-6001530 | 501(C)(3) | 23,000 | 0 | FMV | | Education Grant |
| (48) Texas State University | 74-6002248 | 501(C)(3) | 52,228 | 0 | FMV | | Education Grant |
| (49) The Leatherback Project | 84-2922562 | 501(C)(3) | 100,000 | 0 | FMV | | Research Grant |
| (50) Regents Of The University Of California | 94-6036494 | 501(C)(3) | 208,609 | 0 | FMV | | External Project Funding |
| (51) The University of Alabama | 63-6001138 | 501(C)(3) | 99,981 | 0 | FMV | | Research Grant |
| (52) The University of North Carolina | 56-6001393 | 501(C)(3) | 20,000 | 0 | FMV | | Research Grant |
| (53) The University of Wisconsin | 39-1805963 | 501(C)(3) | 38,282 | 0 | FMV | | Research Grant |
| (54) The University Of Wyoming | 83-6000331 | 501(C)(3) | 20,000 | 0 | FMV | | Education Grant |
| (55) The University of Tulsa | 73-0579298 | 501(C)(3) | 389,568 | 0 | FMV | | Azimuth Grant |
| (56) University of Hawaii Foundation | 99-0085260 | 501(C)(3) | 204,406 | 0 | FMV | | Pristine Seas |
| (57) University of Mississippi | 64-6001159 | 501(C)(3) | 134,755 | 0 | FMV | | Education Grant |
| (58) University of Southern California | 95-1642394 | 501(C)(3) | 175,323 | 0 | FMV | | Perpetual Planet-Rainforest |
| (59) Vanderbilt University | 62-0476822 | 501(C)(3) | 132,595 | 0 | FMV | | Meridian Grant |
| (60) Walter Anderson Museum of Art | 51-0173731 | 501(C)(3) | 50,000 | 0 | FMV | | Education Grant |
| (61) Wildaid Inc | 20-3644441 | 501(C)(3) | 120,000 | 0 | FMV | | Research Grant |
| (62) Wildlife Conservation Network | 30-0108469 | 501(C)(3) | 349,259 | 0 | FMV | | Azimuth Grant |
| (63) Woodrow Wilson Intl Ctr for Scholars | 52-1067541 | 501(C)(3) | 99,993 | 0 | FMV | | Research Grant |
| (64) Woods Hole Oceanographic Institute | 04-2105850 | 501(C)(3) | 18,480 | 0 | FMV | | Research Grant |
| (65) Yale University | 06-0626973 | 501(C)(3) | 20,000 | 0 | FMV | | Research Grant |

**2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . ▶ 65

**3** Enter total number of other organizations listed in the line 1 table . . . ▶ 0

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** Cat. No. 50055P **Schedule I (Form 990) 2022**

**Part III** **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

| **(a)** Type of grant or assistance | **(b)** Number of recipients | **(c)** Amount of cash grant | **(d)** Amount of noncash assistance | **(e)** Method of valuation (book, FMV, appraisal, other) | **(f)** Description of noncash assistance |
|---|---|---|---|---|---|
| (1) GRANTS | 67 | 5,049,169 | | | |
| (1) | | | | | |
| (2) | | | | | |
| (3) | | | | | |
| (4) | | | | | |
| (5) | | | | | |
| (6) | | | | | |
| (7) | | | | | |

**Part IV** **Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

| Return Reference | Explanation |
|---|---|
| Schedule I, Part I, Line 2 Procedures for monitoring use of grant funds. | The National Geographic Society FUNDS GRANTS ACROSS THE FIELDS OF CONSERVATION, EDUCATION, RESEARCH, STORYTELLING AND TECHNOLOGY. GRANT PROPOSALS ARE REVIEWED BY NATIONAL GEOGRAPHIC STAFF EXPERTS, AN EXTERNAL PANEL OF GLOBAL SUBJECT MATTER EXPERTS AND AN EXECUTIVE COMMITTEE WHO RECOMENDS GRANTS FOR APPROVAL. When outside expertise is required to meet the impact objectives of a specific program, we often award grants outside of the grants committee process. Any grants awarded outside of the grants committee pipeline are considered "External Project Funding." Such grants are subject to an internal review process that evaluates the expertise of the grantee, the methodology for executing the work, and the overall contribution to programmatic objectives. Once the grantee is selected, the entire project - including grant funding - is submitted for approval by the NGS senior team through the "Spend Approval Process." Grants approved through this process are subject to reporting requirements above and beyond those required of standard grantees. THE GRANT RECIPENTS ARE REQUIRED TO SIGN A GRANT AGREEMENT AND SUBMIT REPORTING INCLUDING A FINANCIAL ACCOUNTING OF FUNDS SPENT TO ENSURE THAT THE GRANT FUNDS ARE PROPERLY USED AND ACCOUNTED FOR. THE FOLLOWING IS A DETAILED DESCRIPTION: WHEN A NATIONAL GEOGRAPHIC SOCIETY GRANT APPLICATION HAS BEEN APPROVED, PAYMENT IS ISSUED ONCE THE SOCIETY HAS RECEIVED THE FOLLOWING COMPLETED, SIGNED DOCUMENTS FROM THE GRANTEE: 1) APPROPRIATE TAX FORM. ALL GRANTEES WHO ARE NOT US CITIZENS ARE REQUIRED TO SIGN AND SUBMIT THE APPROPRIATE TAX FORM (FORM W-8) FOR WORK CONDUCTED WHOLLY OUTSIDE THE US. 2) GRANT AGREEMENT. ALL GRANTEES MUST COMPLETE AND SIGN A GRANT AGREEMENT, WHICH INCLUDES DUE DATES FOR RESEARCH REPORTS AND FINANCIAL REPORTS (GENERALLY DUE WITHIN SIX MONTHS OF COMPLETION OF THE FIELD WORK.) BY SIGNING THE GRANT AGREEMENT, THE GRANTEE AGREES TO SUBMIT A FINAL NARRATIVE REPORT AND A FINANCIAL ACCOUNTING OF THE GRANT MONIES SPENT BEFORE THE INDICATED SUBMISSION DEADLINE. GRANTEES ALSO CERTIFY TO PARAGRAPHS 16 17 (COPIED BELOW) THAT THEY WILL NOT PROMOTE TERRORISM AND WILL COMPLY WITH FOREIGN TRADE CONTROLS: 17. CERTIFICATION. BY COUNTERSIGNING THIS AGREEMENT, YOU CERTIFY THAT YOUR ORGANIZATION DOES NOT AND WILL NOT PROMOTE OR ENGAGE IN VIOLENCE OR TERRORISM, NOR WILL YOUR ORGANIZATION MAKE SUB-GRANTS OR OTHER PAYMENTS TO ANY ENTITY THAT ENGAGES IN SUCH ACTIVITIES. 17 U.S. FOREIGN TRADE CONTROLS. BY COUNTERSIGNING THIS AGREEMENT, I OR GRANTEE ACKNOWLEDGE THAT I AM AWARE OF, AND AGREE TO COMPLY FULLY WITH, U.S. FOREIGN TRADE CONTROLS THAT GOVERN TRAVEL TO, AND TRANSACTIONS WITH, COUNTRIES SUCH AS CUBA, IRAN, SUDAN, SYRIA, NORTH KOREA, CRIMEA TERRITORY, AND OTHER U.S.-SANCTIONED COUNTRIES, INCLUDING ANY SUCH CONTROLS THAT MAY BE IMPOSED IN THE FUTURE DURING THE PERIOD OF THE GRANT. SPECIFICALLY, I ACKNOWLEDGE THAT I AM AWARE OF AND AGREE TO COMPLY WITH THE REGULATIONS OF THE U.S. DEPARTMENT OF THE TREASURY GOVERNING TRAVEL TO AND TRADE WITH COUNTRIES SUBJECT TO U.S. ECONOMIC SANCTIONS (31 CODE OF FEDERAL REGULATIONS PARTS 500-598) AND ALSO WITH THE EXPORT ADMINISTRATION REGULATIONS OF THE U.S. DEPARTMENT OF COMMERCE (15 CODE OF FEDERAL REGULATIONS PARTS 730-774). I ALSO AGREE THAT, BEFORE ANY FUNDS ARE DISBURSED UNDER THIS GRANT, I WILL PROVIDE THE SOCIETY WITH COPIES OF ANY AUTHORIZATIONS FROM THE U.S. TREASURY DEPARTMENT'S OFFICE OF FOREIGN ASSETS CONTROL ("OFAC") NECESSARY TO CARRY OUT THE GRANT, OR COPIES OF CORRESPONDENCE FROM OFAC CONFIRMING THAT NO SPECIFIC AUTHORIZATIONS ARE NECESSARY. I ALSO REPRESENT AND WARRANT TO THE SOCIETY THAT IN SEEKING AUTHORIZATIONS FROM OFAC AND/OR CONFIRMATION THAT NO SUCH AUTHORIZATIONS ARE NECESSARY, I FULLY DISCLOSED THE NATURE OF THE GRANT AND ITS PARTICIPANTS AND IDENTIFIED THE SOCIETY AS A SOURCE OF FUNDING. I ALSO AGREE THAT I WILL KEEP ALL NECESSARY RECORDS TO SHOW THAT I HAVE COMPLIED WITH U.S. FOREIGN TRADE CONTROLS. FINALLY, I ACKNOWLEDGE THAT I HAVE BEEN ADVISED BY THE SOCIETY TO CONSULT WITH MY OWN LEGAL COUNSEL IN CONNECTION WITH MY OBLIGATIONS UNDER U.S. FOREIGN TRADE CONTROLS.GRANTEES ARE REQUIRED TO SUBMIT A CERTIFICATION RELATED TO ETHICAL ISSUES AND THAT THE GRANTEE IS IN COMPLIANCE WITH APPLICABLE ANTI-CORRUPTION LAWS;THEY ALSO CERTIFY THAT THEY HAVE THE PROPER PERMITS TO UNDERTAKE THE PROPOSED FIELD RESEARCH IN THE COUNTRY IN WHICH IT WILL BE CONDUCTED AND THAT NO IMPROPER PAYMENTS OF ANY VALUE HAVE BEEN MADE DURING THE PROCESS OF OBTAINING SUCH PERMITS. ADDITIONALLY, GRANTEES AFFILIATED WITH GOVERNMENT AGENCIES OR PUBLIC INSTITUTIONS ARE SCREENED IN ORDER TO IDENTIFY AND AVOID POTENTIAL CONFLICTS OF INTEREST INVOLVING THE GRANTEE'S OFFICIAL JOB DUTIES AND THE SOCIETY. THE SOCIETY'S FINANCIAL ACCOUNTS PAYABLE SYSTEM ALSO REVIEWS FOR COMPLIANCE WITH FINANCIAL SANCTIONS LIST (THE SDN LIST) COMPLIED AND MAINTAINED BY THE U.S. TREASURY UPON NEW VENDOR SET-UP AND PRIOR TO EACH PAYMENT. ONCE PAYMENT IS ISSUED, IF GRANTEES WOULD LIKE TO ALTER THEIR PROPOSED BUDGET IN ANY WAY THEY MUST SUBMIT THEIR REQUEST TO THE PROGRAM OFFICER. THE REQUEST IS APPROVED OR DENIED AND A RECORD OF THE CHANGE IS ADDED TO THE GRANT FILE. THE GRANTEE MUST SUBMIT THEIR FINAL REPORT AND FINANCIAL ACCOUNTING BEFORE THE DEADLINE INDICATED IN THEIR GRANT AGREEMENT UNLESS AN EXTENSION HAS BEEN REQUESTED IN WRITING AND APPROVED BY THE PROGRAM OFFICER. THE FINANCIAL ACCOUNTING PROVIDES A BREAKDOWN OF THE ACTUAL COSTS OF THE PROJECT AND IS EXPECTED TO PARALLEL THE COSTS PROJECTED IN THE ORIGINAL GRANT APPLICATION BUDGET; ALL DISCREPANCIES MUST BE EXPLAINED. IF THERE ARE UN-EXPENDED GRANT MONIES THEY MUST BE RETURNED TO THE SOCIETY. THE REPORTS COORIDINATOR REVIEWS THE FINAL REPORT AND FINANCIAL ACCOUNTING FOR COMPLETNESS AND THEN CIRCULATES BOTH REPORTS TO THE PROGRAM OFFICERS FINAL REVIEW AND APPROVAL. ONCE THE REPORTS ARE APPROVED, THE GRANT IS CLOSED. AN ELECTRONIC COPY OF THE GRANT FILE IS RETAINED, in accordance with the Society's document retention policy, BY THE GRANT OPERATIONS STAFF, WHICH IS THE OFFICIAL REPOSITORY FOR ALL GRANTS RELATED DOCUMENTATION. |

**Schedule I (Form 990) 2022**

## Additional Data

Return to Form

**Software ID:** 22016089

efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519

**Schedule J** (Form 990)

Department of the Treasury
Internal Revenue Service

# Compensation Information

**For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**
**▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**
**▶ Attach to Form 990.**
**▶ Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

Name of the organization
NATIONAL GEOGRAPHIC SOCIETY

**Employer identification number**
53-0193519

## Part I Questions Regarding Compensation

| | | | Yes | No |
|---|---|---|---|---|
| **1a** | Check the appropiate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.<br>☐ First-class or charter travel<br>☑ Travel for companions<br>☐ Tax idemnification and gross-up payments<br>☐ Discretionary spending account<br>☐ Housing allowance or residence for personal use<br>☐ Payments for business use of personal residence<br>☐ Health or social club dues or initiation fees<br>☐ Personal services (e.g., maid, chauffeur, chef) | | | |
| **b** | If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain . . . . . | **1b** | Yes | |
| **2** | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a? . . . . | **2** | Yes | |
| **3** | Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.<br>☑ Compensation committee<br>☑ Independent compensation consultant<br>☑ Form 990 of other organizations<br>☑ Written employment contract<br>☑ Compensation survey or study<br>☑ Approval by the board or compensation committee | | | |
| **4** | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization: | | | |
| **a** | Receive a severance payment or change-of-control payment? . . . . . . . . . . . . . . . | **4a** | Yes | |
| **b** | Participate in, or receive payment from, a supplemental nonqualified retirement plan? . . . . . . . . . . | **4b** | | No |
| **c** | Participate in, or receive payment from, an equity-based compensation arrangement? . . . . . . . . . .<br>If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III. | **4c** | | No |
| | **Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.** | | | |
| **5** | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of: | | | |
| **a** | The organization? . . . . . . . . . . . . . . . . . . . . | **5a** | | No |
| **b** | Any related organization? . . . . . . . . . . . . . . . . . . . . . . . .<br>If "Yes," on line 5a or 5b, describe in Part III. | **5b** | | No |
| **6** | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of: | | | |
| **a** | The organization? . . . . . . . . . . . . . . . . . . . | **6a** | | No |
| **b** | Any related organization? . . . . . . . . . . . . . . . . . . . . . . .<br>If "Yes," on line 6a or 6b, describe in Part III. | **6b** | | No |
| **7** | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III . . . . . . . . . . . . . . | **7** | | No |
| **8** | Were any amounts reported on Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III . . . . . . . . . . . . . . . . . . . . . . . . . . | **8** | | No |
| **9** | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? . . . . . . . . . . . . . . . . . . . . . . . . . . . | **9** | | |

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** Cat. No. 50053T **Schedule J (Form 990) 2022**

Page 2

Schedule J (Form 990) 2022 Page **2**

## Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.

Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.
**Note.** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

| **(A)** Name and Title | | **(B)** Breakdown of W-2, 1099-MISC compensation, and/or 1099-NEC **(i)** Base compensation | **(ii)** Bonus & incentive compensation | **(iii)** Other reportable compensation | **(C)** Retirement and other deferred compensation | **(D)** Nontaxable benefits | **(E)** Total of columns (B)(i)-(D) | **(F)** Compensation in column (B) reported as deferred on prior Form 990 |
|---|---|---|---|---|---|---|---|---|
| **1** Jill Tiefenthaler | (i) | 1,002,647 | 324,450 | 0 | 10,250 | 24,278 | 1,361,625 | 0 |
| CEO | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **2** MICHAEL ULICA | (i) | 638,573 | 198,690 | 0 | 10,250 | 17,474 | 864,987 | 0 |
| PRESIDENT/COO/TREASURER | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **3** Robert Young | (i) | 383,837 | 0 | 0 | 10,250 | 20,970 | 415,057 | 0 |
| CFO | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **4** Sumeet Seam | (i) | 536,096 | 15,000 | 0 | 10,250 | 22,773 | 584,119 | 0 |
| Chief Legal Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **5** Vicki Phillips | (i) | 0 | 0 | 498,774 | 0 | 0 | 498,774 | 497,104 |
| EVP Chief Education Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **6** Jason Southern | (i) | 357,044 | 0 | 0 | 10,250 | 21,939 | 389,233 | 0 |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Chief Technology Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **7** Kara Ramirez Mullins | (i) | 562,392 | 0 | 0 | 10,250 | 21,507 | 594,149 | 0 |
| Chief Advancement Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **8** Mara Dell | (i) | 413,188 | 0 | 0 | 10,250 | 13,008 | 436,446 | 0 |
| Chief Human Resources Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **9** Crystal Brown | (i) | 513,370 | 10,000 | 0 | 10,250 | 2,884 | 536,504 | 0 |
| Chief Communications Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **10** Shannon Bartlett | (i) | 300,059 | 5,000 | 0 | 9,462 | 21,661 | 336,182 | 0 |
| Chief Diversity, Equity, Inclusion Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **11** Ian Miller | (i) | 527,879 | 0 | 0 | 10,250 | 17,861 | 555,990 | 0 |
| Chief Science Innovation Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **12** Kim Waldron | (i) | 361,161 | 0 | 0 | 9,176 | 16,156 | 386,493 | 0 |
| Chief of Staff Program Alignment | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **13** Alex Moen | (i) | 347,363 | 0 | 0 | 9,750 | 23,150 | 380,263 | 0 |
| Chief Explorer Engagement Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **14** Enric Sala | (i) | 392,331 | 5,000 | 0 | 10,250 | 9,314 | 416,895 | 0 |
| Explorer in Residence | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **15** Kaitlin Yarnall | (i) | 337,227 | 5,000 | 0 | 9,750 | 23,153 | 375,130 | 0 |
| Chief Storytelling Officer SVP | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **16** Kristi Craig | (i) | 382,911 | 200,000 | 0 | 1,547 | 19,213 | 603,671 | 0 |
| Chief Investment Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **17** Anthony Luckett | (i) | 253,123 | 30,000 | 0 | 4,673 | 14,625 | 302,421 | 0 |
| VP, Business Development | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **18** TARA BUNCH | (i) | 0 | 0 | 295,394 | 0 | 0 | 295,394 | 295,394 |
| Chief Administrative Officer | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **19** FRANK BORMAN | (i) | 13,000 | 0 | 0 | 0 | 0 | 13,000 | 0 |
| TRUSTEE EMERITUS | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **20** Gary E Knell | (i) | 22,700 | 0 | 0 | 0 | 0 | 22,700 | 0 |
| CEO President | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **21** Valerie Craig | (i) | 0 | 0 | 110,304 | 0 | 0 | 110,304 | 110,304 |
| VP, Operating Programs | (ii) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

**Schedule J (Form 990) 2022**

Page 3

Schedule J (Form 990) 2022 Page **3**

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

| Return Reference | Explanation |
|---|---|
| Schedule J, Part I, Line 1a Travel for companions | The September 2022 board of Trustees meeting was held in Botswana and The Society paid for 11 board members and 6 staff's spouses to attend. This amount was treated as taxable compensation to the board members and staff. The Society pays for companion travel for certain executives, only when there is a business purpose to support the charitable mission of the organization and adheres to the Society's travel policies. Companion travel not meeting this criteria are deemed taxable under Internal Revenue guidelines. |
| Schedule J, Part I, Line 4a Severance or change-of-control payment | THE FOLLOWING FORMER OFFICERS, KEY EMPLOYEES, AND HIGHLY COMPENSATED EMPLOYEES RECEIVED SEVERANCE PAYMENTS IN 2022: Tara Bunch--$295,394 Vicki Phillips--$458,865 Valerie Craig--$110,304 (all of the above payments were accrued in 2021) |
| Schedule J, Part II NONTAXABLE BENEFITS | Components of benefits and deferred compensation provided to certain executives: life insurance, parking, 401(k), 457(b), dental medical insurance, long-term disability, and travel/accident insurance. Below is a summary of all officers or key employees who had a severance clause in their respective employment contracts in 2022. These severance amounts are solely contingent upon an employee's involuntary termination without cause from the Society. As such, these amounts were not accrued or funded in any way and were considered unlikely to occur and did not occur in 2022. None of these amounts have been included in Column D. Jill Tiefenthaler - 1 times base salary |

**Schedule J (Form 990) 2022**

## Additional Data

Return to Form

**Software ID:** 22016089

efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519

**SCHEDULE M (Form 990)**

Department of the Treasury
Internal Revenue Service

# Noncash Contributions

▶ **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**
▶ **Attach to Form 990.**
▶ **Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

Name of the organization
NATIONAL GEOGRAPHIC SOCIETY

**Employer identification number**
53-0193519

**Part I Types of Property**

| | (a) Check if applicable | (b) Number of contributions or items contributed | (c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g | (d) Method of determining noncash contribution amounts |
|---|---|---|---|---|
| 1 Art—Works of art | | | | |
| 2 Art—Historical treasures | | | | |
| 3 Art—Fractional interests | | | | |
| 4 Books and publications | | | | |
| 5 Clothing and household goods | | | | |
| 6 Cars and other vehicles | | | | |
| 7 Boats and planes | | | | |
| 8 Intellectual property | | | | |
| 9 Securities—Publicly traded | X | 43 | 352,973 | Market value |
| 10 Securities—Closely held stock | | | | |
| 11 Securities—Partnership, LLC, or trust interests | | | | |
| 12 Securities—Miscellaneous | | | | |
| 13 Qualified conservation contribution—Historic structures | | | | |
| 14 Qualified conservation contribution—Other | | | | |
| 15 Real estate—Residential | | | | |
| 16 Real estate—Commercial | | | | |
| 17 Real estate—Other | | | | |
| 18 Collectibles | | | | |
| 19 Food inventory | | | | |
| 20 Drugs and medical supplies | | | | |
| 21 Taxidermy | | | | |
| 22 Historical artifacts | | | | |
| 23 Scientific specimens | | | | |
| 24 Archeological artifacts | | | | |
| 25 Other ▶ ( complementary software accounts ) | X | 1 | 173,306 | Market value |
| 26 Other ▶ ( SATELLITE COMMUNICATIONS EQUIPMENT ) | X | 1 | 727,750 | Market value |
| 27 Other ▶ ( CAMERAS FOR PHOTO CAMP ) | X | 1 | 28,999 | Market value |
| 28 Other ▶ ( ) | | | | |

**29** Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement | **29** | 0

| | | Yes | No |
|---|---|---|---|
| **30a** During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? | **30a** | | No |
| **b** If "Yes," describe the arrangement in Part II. | | | |
| **31** Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions? | **31** | Yes | |
| **32a** Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? | **32a** | | No |
| **b** If "Yes," describe in Part II. | | | |
| **33** If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II. | | | |

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** Cat. No. 51227J **Schedule M (Form 990) (2022)**

**Schedule M (Form 990) (2022)** Page **2**

**Part II** **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

| Return Reference | Explanation |
|---|---|
| Schedule M, Part I Explanations of reporting method for number of contributions | Securities - Publicly traded - # of contributions Other - complementary software accounts # of contributions Other - SATELLITE COMMUNICATIONS EQUIPMENT # OF CONTRIBUTIONS Other - CAMERAS FOR PHOTO CAMP # OF CONTRIBUTIONS |

**Schedule M (Form 990) (2022)**

## Additional Data

Return to Form

**Software ID:** 22016089

**Software Version:** 2022v5.0

| efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519 |
|---|---|---|

**SCHEDULE O** (Form 990)

Department of the Treasury Internal Revenue Service

# Supplemental Information to Form 990 or 990-EZ

**Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.**
**▶ Attach to Form 990 or 990-EZ.**
**▶ Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

Name of the organization
NATIONAL GEOGRAPHIC SOCIETY

**Employer identification number**
53-0193519

| Return Reference | Explanation |
|---|---|
| Form 990, Part III, Line 4b Science and Innovation Programs cont. | Since 2016, the National Geographic Okavango Wilderness Project has been working with communities and governments to secure permanent, sustainable protection for the greater Okavango Basin - which spans Angola, Namibia, and Botswana. A team of Explorers, local and regional experts, and partners at the Wild Bird Trust are working to accomplish this through rigorous scientific research, impactful conservation education projects, and storytelling about the ecosystem and people who live there. Pristine Seas is an exploration, research, and media project founded and led by National Geographic Explorer-in-Residence Dr. Enric Sala. Its mission is to collaborate with local communities and governments to establish marine protected areas, and spearhead a worldwide network of partners to reach the critical threshold of 30% ocean protection by 2030 (30x30). This includes not only preserving areas that are pristine or near pristine, but also helping to bring closer to pristine (i.e., to restore) areas that may have suffered some human impacts but still harbor unique features such as large animals, healthy bottom communities, and outstanding biodiversity. Over the last twelve years, Pristine Seas has carried out expeditions in 34 places, 26 of which have since been protected, covering a total area of 6.5 million square kilometers - more than twice the size of India. In 2022, Pristine Seas completed expeditions to: the Caribbean Pacific coasts of Colombia, Canada's James Hudson Bays, Peninsula Valdez, Argentina, the Caribbean island of Dominica. As a result of our Colombia expedition, the government committed to protect 30% of its waters. The National Geographic Photo Ark is a multiyear effort to raise awareness of and find solutions to some of the most pressing issues affecting wildlife and their habitats. The Photo Ark's three-pronged approach harnesses the power of National Geographic photography and the bold ideas of our explorers. Led by National Geographic explorer Joel Sartore, the project aims to document every species living in the world's zoos and wildlife sanctuaries, inspire action through education, and help save wildlife by supporting on-the-ground conservation efforts. In 2022, Sartore passed the 13,000 species mark with the addition of the spoon billed sandpiper to the Photo Ark. Over the last 12 months, Sartore photographed in Costa Rica, Germany, Poland, Croatia, Netherlands, Belgium, Canada UK, UAE, Austria, and Czechia. In addition to this international coverage, he spent 48 days photographing in U.S. locations and 1,212 species were photographed during the year. National Geographic's Perpetual Planet Expeditions program, a multiyear partnership with Rolex as part of their Perpetual Planet initiative, seeks to study and illuminate Earth's critical systems. This partnership supports expeditions to explore the planet's most critical environments, including high-alpine environments, rainforests, and the ocean. These groundbreaking expeditions fill knowledge gaps to help scientists, decision-makers, and local communities plan for and find solutions to the impacts of climate and environmental change. These systems, however, are increasingly at risk due to global environmental challenges like climate change. That's why National Geographic and Rolex have partnered to support trailblazing scientific research, expeditions, and solutions to increase our understanding of the threats facing the planet's life support systems and drive action to address them. The partnership supports a series of expeditions to examine the impact of climate and environmental change on the planet's most fragile iconic environments, to document the changes occurring and the implications for people and wildlife. LI/LII Grants--the Level I grant opportunity is designed for individuals who are working to establish themselves in their field, hope to gain experience leading projects, are interested in joining the National Geographic Explorer community, and have not yet received a grant from the National Geographic Society. The Level II grant opportunity is designed for individuals who are more established in their field and are seeking a higher level of funding. Projects at this level should push the boundaries of the applicant's field or discipline and be designed to achieve significant and tangible impacts. Applicants may be new to the Society or existing National Geographic Explorers. Explorer Capacity Development--the Society continues to support Explorers in their capacity development by offering a portfolio of learning and development opportunities, online and in-person. Professional development offerings range from mandatory onboarding courses for all new grantees covering the nuts and bolts of how to talk about their grant and their relationship with the Society to knowing how to abide by the Society's ethics code to honing their competency in service-oriented leadership and cross-cultural collaborations. Every year, a couple of hundred grantees go through the onboarding process. Several hundred Explorers also enroll in skill-building webinars and in-person trainings to deploy hardware (e.g. drop cameras) and software (e.g. ESRI and other mapping tools) and to improve their communications skills. Additionally, dozens of Explorers participate in blended public speaking, video development, and other workshops offered across the world. The National Geographic Society continues to support the Explorers at Large program to develop and enhance its long-standing relationships with some of the world's preeminent scientists, educators, and storytellers. These experts are dedicated to making notable advances in their respective fields and are highly regarded within their field. Groundbreaking discoveries fuel the kind of critical information, conservation initiatives, and compelling stories that are the hallmark of the National Geographic Society. National Geographic Explorers at Large for 2022 are Shahidul Alam, Bob Ballard, Lee Berger, James Cameron, Sylvia Earle, J. Michael Fay, Beverly Joubert, Dereck Joubert, Louise Leakey, Meave Leakey, Maya Lin, Rodrigo Medellin. The Wayfinder Award is presented annually to a cohort of individuals whose innovative work in science, conservation, exploration, education, technology and/or storytelling identifies them as agents for positive change in their fields. Wayfinder Award recipients have proven themselves as the next generation of influential leaders, communicators and innovators whose critical work contributes to moving the National Geographic Society's mission forward. The 2022 Wayfinder Award recipients are: Monica Alcazar-Duarte, Samantha Cristoforetti, Resson Kantai Duff, Farwiza Farhan, Zoleka Filander, Gibbs Kuguru, Yael Martinez, Ariam Mogos, Thai Van Nguyen, Margaret Wickens Pearce, Suzanne Pierre, Sammy Ramsey, Babak Tafreshi, Carlos Velazco, Xi Zhinong. The Hubbard Medal is awarded to individuals for the highest distinction in exploration, scientific research, and discovery. The award most often celebrates years of ground-breaking achievements in a particular field or discipline and has been awarded by NGS since 1906. The 2022 Hubbard Medal honoree is Tom Lovejoy. The National Geographic Society/Buffett Awards for Leadership in Conservation were established by the Society and The Howard G. Buffett Foundation to recognize and celebrate unsung heroes working in the field. Two awards are presented each year: one for achievement in Africa (established in 2002) and the other for achievement in Latin America (established in 2005). The 2022 National Geographic Society/Buffett Awards are Giuliana Furci and Rachel Ikemeh. The Rolex National Geographic Explorer of the Year award is an annual recognition that is awarded to an explorer whose recent actions, achievements and spirit push the boundaries of leadership in exploration and demonstrate a commitment to share new knowledge with the world. The 2022 Explorer of the Year is Tara Roberts. Continued--See Science and Innovation Programs cont. below |

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| Form 990, Part III, Line 4a Storytelling Outreach cont. | The National Geographic Society operates a robust portfolio of Storytelling Programs that aim to diversify, strengthen, and amplify the voices that comprise National Geographic's journalism. National Geographic Photo Camp teaches photography to diverse youth populations around the world, including young people from migrant, refugee, at-risk, and economically developing communities, to inspire and empower the next generation of storytellers with a foundation for impactful photojournalism, and a meaningful introduction to the world of photography. National Geographic's Second Assistant program provides training, mentorship, connections, and pathways for female-identifying and BIPOC early-career photographers in the historically underrepresented field of technical photography by matching early-career photographers with a more experienced National Geographic photographer for hands-on mentorship experiences. National Geographic Field Ready is a mentorship and training program to help early career filmmakers advance in their careers, and to increase diversity and inclusion behind the lens of natural history and wildlife filmmaking by providing early-career filmmakers with interactive master classes and one-on-one mentorship from leading industry professionals. The Out of Eden Walk is a years-long journalistic expedition through which National Geographic explorer Paul Salopek is walking the globe, retracing the pathways of human origins from Africa to South America. This 21,000-mile odyssey is an exercise in slow journalism, allowing Paul to report the major stories of our time holistically by slowing down to walking speed to share the full context and voices of local people behind the headlines of the stories of our time. The Out of Eden Walk is a global storytelling initiative for education and cross-cultural engagement that promotes journalistic education and people-to-people connectivity via the ethos of slow journalism. Africa Refocused addresses the critical need for the stories of Africa to be refocused and told through the perspectives of African people, by African people. Africa Refocused is led by Explorers Noel Kok and Pragna Parsotam-Kok and is designed to build the capacity of local African wildlife photographers and filmmakers. The World Water Map is a global accounting of freshwater resources and deficits. The Illegal Wildlife Trade program, "Wildlife Watch", leverages National Geographic's power of storytelling to raise awareness, inspire action, and provide critical tools to reduce the trade in illegal wildlife. The primary storytelling platform is Wildlife Watch, which is dedicated to shining light on commercial-scale exploitation of wildlife and other valued resources, identifying weaknesses in national and international efforts to protect wildlife, and empowering institutions and individuals working for a better world. On December 20, 2022 President Biden signed the Big Cat Public Safety Act into law. This bill was the result of a 30-page award-winning story that ran in the magazine in the December 2019 issue: Captive tigers in the U.S. outnumber those in the wild. It's a problem. This story was funded by Wildlife Watch and Explorer Sharon Guynup's 2017 Storytelling Grant. The Impact Story Lab is an award-winning creative unit within the National Geographic Society that combines world-class storytelling with social and behavioral science to drive positive change. Our interdisciplinary team collaborates with National Geographic Explorers to produce film, video, audio, photography, VR/AR experiences, and other media to help accomplish the goals of their programs. The Lab also conducts research, publishes findings, and hosts workshops to advance the field of impact storytelling. The Impact Story Lab builds on National Geographic's legacy as a global leader in influential storytelling, and furthers our mission of illuminating and protecting the wonder of our world. The Technology division continues to design, deliver and operate capabilities and platforms for numerous internal and external constituents in the service of National Geographic Society's strategic objectives. We continued to invest in the core set of products used by NGS Explorers and staff to engage with one another: Explorer Directory and Explorer Home. We also completed the relaunch and overhaul of the Educator Hub, our platform for offering classroom resources to teachers and students. We further enhanced these and other digital products by rolling out an improved search index and engine. Finally, in late 2022 Technology released the first version of a new NGS Streaming Data Platform and an initial "data product" that unites information from two disparate systems - events management and CRM - into a single view for Advancement's Relationship Managers. The Communications, Marketing, and Brand Division advances the mission of the National Geographic Society by elevating the Society's work as a nonprofit organization, amplifying Explorer-led stories, and driving global brand awareness of our leadership, key programs, initiatives and impact. The professionals within the Division develop and execute mission-driven, on-brand, and strategic communications, content, marketing, creative, and multimedia to promote across a variety of distribution channels and platforms. |
| Form 990, Part III, Line 4c Education Programs, cont. | National Geographic Society licenses the right to publish K-12 textbooks and English Language Teaching products to Cengage Learning under the National Geographic Learning (NGL) trademark. National Geographic works closely with Cengage to ensure these products maintain the highest quality and inspire learners to explore the world. NGL's products center on the unique stories of explorers and photographers to engage learners. In 2022, NGL featured 545 unique explorers through their publications through 1,907 total explorer editorial features. In 2022, NGL sold 1,023,098 units (i.e. est. number of students and teachers) domestically with reading, science, social studies, and math core and supplemental materials for the K-12 market. NGL sold 122 million units (i.e. est. number of students and teachers) for all ages internationally with English Language Teaching (ELT) products. Notably, NGL and their local partners at Sphinx Publishing, have a large-scale partnership with the Ministry of Education in Egypt in which 7 million primary students will be using 28 million NG-branded books featuring over 20 National Geographic Explorers. The Education team leveraged 41 restricted endowments across 30 states and Canada to scale and spread Explorer-centered work into classrooms and communities. We identified and contracted with 24 partners in 2022, that have the potential to reach a combined total of ~5,000 educators and young people, utilizing approximately ~$1.3M in restricted endowment funding in support of NG Next. The bulk of the funding was used to expand the reach of Slingshot Challenge and Photo Camp programming. We believe that by supporting these initiatives, we can continue to build the pipeline of the next generation of Explorers. During 2022, NGS Education continued to recruit, fund, and support a diverse, global group of Explorers with expertise in education doing impactful work that inspires learners of all ages, in any educational setting, to learn about, care for, and protect our world. Funded projects may build capacity in a group of people to care for and take action to preserve, maintain, and expand solutions to protect our world. Projects may also use educational research or tools to advance knowledge about how to effectively spark curiosity and inspire people of all ages. For both strategic purposes, we focus funding on projects that either introduce innovative ideas or take proven ideas and scale or replicate them for larger audiences and/or different geographical areas. In 2022, we added to our portfolio of over a hundred Education Explorers by funding 16 Explorers at Level I and 6 at Level II. (Q1 Q3 Grantees). We also expanded our portfolio of Explorer-led projects at higher funding levels by adding one project in National Geographic's Ocean focus area. The Educator/Explorer Exchange is a year-long, one-to-one co-mentorship experience between an Explorer and a Nat Geo Certified Educator and their classroom. Prompts and milestones that help pace the Exchange are hosted on our Professional Learning platform, and pairs are encouraged to connect directly - asynchronously or synchronously. The program aims to develop new skills in our Explorer and Educator leaders while they collaborate to create new and innovative educational experiences. The 2021-2022 cohort involved 36 Explorer/educator pairs. Participants represented 26 different countries, 16 U.S. States, and 16 different time zones, with expertise across fields, all subjects and grade levels. The Exchange impacted an estimated 1,110 students through real-world experiences that enabled students to learn by doing. Explorer Classroom runs live interactive virtual events that connect young people with National Geographic Explorers. Students hear behind-the-scenes stories and interact with cutting-edge scientists, researchers, and storytellers from around the globe in real-time. All events are free, open to the public, and include an event guide to help educators and learners get the most out of their experience. Education also kicked off the first International version of Explorer Classroom focused on Mexico. Between October 2022 and May 2023, there will be seven Explorer Classroom events, hosted in Spanish, and featuring a cohort of Explorers from Latin America. We are working with a local NGO, Ensena Por Mexico, to recruit schools at various socioeconomic levels, and work with the educators and Explorers on linking content to the Mexican school curriculum. In 2022 Explorer Classroom ran 100 events reaching over 135,000 students. In partnership with The |

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| | Mexican school curriculum. In 2022 Explorer Classroom ran 100 events reaching over 135,000 students. In partnership with The Nature Conservancy, we hosted three Externships, eight-week learning and career development experiences for young people ages 18-25 from across the globe, which help create more equitable conservation and exploration career pathways. The three cohorts focused on both marine freshwater community conservation, engaging 300 college-aged youth from 75+ countries. Program evaluations show the strong impact, including an average net promoter score of 91 and a 50% increase in average level of knowledge about the marine conservation industry. We awarded 42 externs with $2,000 in seed funding to support their community-based conservation solutions. National Geographic Giant Maps offered 53 classroom-sized maps for all 50 United States, Washington, DC, and the Solar System (ranging from 21' x 14' to 21' x 17') and 7 gym-sized maps (average size 25' x 30' of Africa, Asia, Europe, North America, South America, the Pacific, and the Solar System) for sale to the education market. The vinyl floor maps were designed using the expertise of National Geographic's cartographic division and research on elementary spatial thinking. Maps of the continents and Pacific Ocean were designed for K-8 students, and the Solar System Map was intended for K-12 students. State Giant Maps were designed for third-and-fourth-grade state studies. Each map included free, downloadable activities that can be used with the map. In 2022, 206 maps were sold to 95 schools and school districts, reaching an estimate of more than 20,600 students. The Resource Library features free resources for educators aligned to the content and pedagogy standards they must meet, but do this through the lens of explorers. We feature people and places from around the world, with an emphasis on human involvement in a changing planet. Major topics include geography, social studies, earth, life, physical science, technology, and culture. In 2022, we developed long and short-form nonfiction articles, videos, photographs, maps, StoryMaps, infographics, and assessments, and are offered up in themed collections. We also stood up a new content management system and installed a new search tool. In 2022, the Resource Library served 3,000 pieces of content in 92.8 million pageviews to more than 46.3 million unique users. We successfully launched the Slingshot Challenge on October 20, including the digital campaign, landing page and youth and educator toolkits. The Slingshot Challenge is the result of a new partnership between the National Geographic Society and the Paul G. Allen Family Foundation, and aims to identify and support youth 13-18 years of age from around the globe to take action around environmental issues. Youth submit a one-minute video of their idea to solve an environmental problem in their community for a chance to win one of five $10,000 prizes and an invitation to attend our iconic Explorers Festival. By the end of 2022, nearly 3,200 youth and more than 900 educators had registered to participate in the challenge. The challenge closes to submissions at the end of February 2023 and winners will be announced and celebrated in May 2023. Continued--See Education Programs cont. below |
| Form 990, Part III, Line 4c Education Programs, cont. | In collaboration with Putney Student Travel, on November 19, The Education Program team launched the new National Geographic Student Travel, a program that will offer immersive travel experiences for high school-aged students. These experiences will be designed to connect youth with the National Geographic Society, our mission, and our Explorers while building an Explorer Mindset in participants through authentic, experiential travel and exploration. |
| Form 990, Part III, Line 4d Misc. Program Services, cont. | IMPACT INVESTING The Investment Subcommittee with the approval of the Finance Committee directed the Outsourced Chief Investment Officer (OCIO) to deploy a portion of the investment fund to impact investments within the guidelines of the total portfolio. The OCIO has the flexibility to invest across asset classes and will be measured against the MSCI All Country World Index (net) over a full market cycle. Impact parameters must demonstrate strong alignment with one or more of the Society's global mission priorities to help protect species-at-risk, better understand human history and culture, and conserve some of our planet's last wild places. Relevant investment strategies may include but are not limited to environmental sustainability, conservation, resource efficiency, cultural diversity, and education. The National Geographic Society Library Archives--The Society Library's reading room is open to the public by appointment. Library and archives staffers respond to phone calls, letters and emails. In 2022 they handled more than 250 queries from scholars and members of the public. Librarians participated in regional interlibrary loan, provided campus tours, lending items from the physical collection to various DC-area libraries. Finally, books and magazines were donated to nonprofit organizations. Continued--See Misc. Programs cont. below |
| Form 990, Part III, Line 4b Science and Innovation Programs, cont. | The Young Explorers program annually recognizes, empowers, and invests in inspirational next-generation changemakers who have shown exceptional courage in breaking boundaries and leading creative solutions to illuminate and protect the wonder of our world. In 2022, National Geographic brought four Young Explorers to its Washington, D.C., headquarters for a multi-day elevation opportunity. NGS also spent several months redesigning the program and relaunching the experience to provide more support to our Young Explorers. National Geographic's Exploration Technology Lab uses technology development to build and deploy systems and hardware to empower our network of National Geographic Explorers through access to innovative technologies and tools. In 2022 the Exploration Technology Lab has focused on bringing together Explorers and other subject matter experts to facilitate new ideas and approaches to technology innovation, sourcing and supplying Explorers with bespoke and off the shelf technology, tools and training to accelerate their work, and consulting and advising on technology solutions. Examples include collaboration with Explores to record and publish new findings around deep-sea habitat, support Explorers through creation of bespoke technology including animal born camera systems that will help to interpret voices and sounds of sperm whales. Meridian projects activate our Explorers to engage and empower communities around the world, create deeper connections between Explorers, help Explorers broaden their horizons with new skills, ideas, and perspectives, and supercharge Explorers' ability to contribute to creative solutions that combine efforts across science, storytelling, and education. This funding opportunity is only open to Explorers who are collaborating together on a project that combines at least two of NGS's broad disciplines (storytelling, research, technology, education, or conservation) and integrates, engages, and supports local communities in the project. In 2022, NGS funded 15 Meridian Projects for a total funding amount of $1,707,476 this year. The 15 Meridian teams included 67 Explorers as well as numerous local collaborators. The projects will take place in all regions of the world - Asia-Pacific, Latin America, Africa, Europe and the Middle East, and North America - and each project focuses on at least one of NGS' focus areas of wildlife, human ingenuity, ocean, human histories and cultures, and land. |
| Form 990, Part III, Line 4d Misc. Program Services cont. | The National Geographic Society remains committed to operating sustainably and expecting those we work with to continually improve their sustainable operations. The Society's headquarters became the first LEED-EB certified buildings (2003 Silver), and, through ongoing tracking and improvement of energy usage, building maintenance, waste diversion, office supply purchases, and renovation activity, our headquarters remain the most certified and longest continuously certified existing buildings in the world. We rose from Silver to Gold in 2009, and in 2022, applied for our seventh LEED-EB certification. Sustainability goals The Society has a Corporate Responsibility Policy (CRP) that it shares with employees, suppliers, vendors, and partners. The Society also maintains four core company-wide sustainability goals: * to become a carbon negative organization * to work toward zero landfill waste * to practice wise resource stewardship * to have an engaged and healthy workforce Becoming a carbon negative organization The Society performs an annual carbon assessment of its Scope 1, 2, and 3 carbon emissions for 15 businesses/departments with over 70 data points. The goal is to quantify carbon emissions from Society and National Geographic branded activities, reduce such emissions as much as possible, offset emissions that cannot be eliminated and seek out innovative ways to eliminate more emissions. Besides continually evaluating our energy use for efficiencies, we also participate in a demand response program to act as a virtual power plant for our region. The Society purchases RECs (Renewable Energy Certificates) to offset all the electrical |

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| | usage of our owned buildings and leased space. Offsets are purchased for all non-electrical emissions of Society-owned and leased space and for business travel emissions. Day to day operations are continually evaluated and improved to seek maximum energy and water efficiency. Our headquarters (and all NGS North American facilities) have been carbon neutral since 2009. Sending zero waste to the landfill The Society seeks to reduce waste produced at its headquarters and to reuse, recycle or compost as much as possible. Our landfill diversion rate is over 50%. Employees and tenants share office supplies in communal copy rooms and share excess supplies on internal digital channels to try and reduce the need to purchase new office supplies. Our mail room accepts reusable packaging material and individual shippers are continually on the lookout for less wasteful, more environmentally friendly fill and packaging. Our usable furniture and fixtures are evaluated for reuse at our HQ before being considered for a giveaway. Reusable dishware and utensils are provided in NGS and NGP kitchens to use in place of disposables. Water bottle refill stations are located at all water fountains. Furniture, equipment, supplies, and Nat Geo products that are no longer needed at the headquarters are offered to local organizations, especially nonprofits, schools, and museums. We have centralized multi-stream waste centers throughout our buildings that include paper recycling, container recycling, and composting alongside a stream labeled "landfill." Recycling and upcycling streams include the composting of all food waste and non-recyclable paper products and the re-use or recycling of more than 25 other materials including paper, metals, glass, plastics, electronics, construction materials, used cooking oil, plastic film (shrink wrap/bubble wrap), and disposable masks and gloves. Practicing the wise use of resources Through our Corporate Responsibility Policy, paper suppliers to the Society are asked to provide paper from certified forestry sources, never from old-growth or high-conservation-value designated forests and never bleached with elemental chlorine. National Geographic Society activities and services are to be legally and ethically conducted by treating employees, environments, and cultures with respect. Suppliers who provide manufacturing services to the Society are expected to follow efficient and clean production principles - including taking such measures as re-using waste, process modification, and the awareness and reduction of hazardous materials use. For our ongoing LEED-EB practices, the type of supplies purchased for use at headquarters and the disposal of all items is tracked, ensuring ongoing improvement in sustainable purchasing and landfill diversion. Our cleaning crews use green-e certified cleaning products and our carpenters and painters use low or non-VOC products in facility alterations. Many of the building materials used in the Society are made from recycled material. Our new renovation project has been tasked with abiding by these same considerations to ensure that our new spaces, when completed, can be maintained at the same if not higher LEED-EB standard. Water Restoration Certificates are purchased to offset water usage in the DC headquarters. Low-flow fixtures and smart sprinklers ensure that we minimize water usage in our facilities and around our native and adaptive landscape. Butterfly gardens and beehives on the headquarters grounds and rooftop, respectively, support endangered species and educational efforts. The Society has made a special effort to remove single-use plastic waste and unnecessary plastic at our headquarters. Multiple suppliers and National Geographic teams are seeking plastic pollution free solutions for their operations. Special event badges have been changed from plastic to paper. Reusable dishware and utensils are provided to staff to make disposable plastic utensils or paper dishes and cups (which are generally plastic coated) unnecessary. Coffee makers and bottleless water coolers with CO2 in each kitchen allow staff to fill reusable mugs and bottles. Our coffee service is a multi-serve system that uses compostable filters, multi-use gravity pots, and grounds from a local roaster in reusable containers. In our Cafe and Cafeteria, straws are paper and to-go food packaging is almost entirely compostable or recyclable. Engaged and healthy workforce Sustainability is offered as part of new employee orientation. All occupants of headquarters' buildings are encouraged to join the Green Team to help improve sustainability in our building operations and offerings. All employees and tenants are encouraged to actively participate in and create our many, varied sustainability events and initiatives including Earth Week, courtyard sustainability markets, Bike to Work Day, staff beekeeping, and corporate responsibility advisory groups. Lessons learned in the workplace also help encourage healthier and more sustainable activities outside the office. The Society encourages bicycle commuting locally through the provision of sidewalk bike racks, garaged bike racks, a bike room, bike maintenance stands, air pumps, lockers, and showers, as well as being an official pit stop on Bike to Work Day and arranging employee discounts at bike shops and free membership with bike sharing services. Carpooling and the use of low-emission vehicles are supported through parking discounts and free charging. Employees can even enjoy a metro commuting subsidy or bicycle commuter subsidy. Exercise fitness areas are available to all HQ occupants along with free recycling for 'difficult to recycle' CFLs, batteries, plastic film, and personal electronics. Specific achievements in 2022: In 2022, we were able to bring back * Summer green markets featuring local and sustainable businesses * "Swap Meets" for re-homing personal items several times a year * In-person Bike to Work Day pitstop for staff and neighbors commuting into our area for work; 175 registrants * Briefly returned local farm stand *Updated CRP and created Sustainability Guidelines; both to be released in 2023. *Gave away for re-use 49 tons of furniture, office supplies, and art supplies. Worked with around 50 community organizations to pick up and reuse our 'waste' for free - equipment, furniture, office supplies, books, magazines, decorations, pallets, banners. Over 59,000 lbs of materials given away for free. Another 38,000 lbs went to reuse with paid pickups. Over 50% of our waste diverted from landfills into reuse, recycling, or compost. *Organized collection of old Bike to Work Day banners from other DMV pit stops to be reused by a local artist remaining bike trash into bags, keychains, jewelry, and more. *Launched e-Bikeshare for staff, tenants and guests, providing e-bike lesson, and protective gear. *Collected data to calculate emissions from UPS shipping and remote work to add to carbon footprint accounting. *Evaluated landscaping that can be transplanted ahead of removal for new construction and courtyard renovation and began process of giving away plantings to staff and neighbors. *Had goDCgo update our Get Around Guide - to provide HQ guests clear info |
| Form 990, Part III, Line 4d Description of other program services | (Expenses $ including grants of $)(Revenue $ 62,762) In 2022, miscellaneous program activity included an impact investing directive, continuing sustainability initiatives, and a reading room and library. Continued on Sch. O Other Miscellaneous Programs. |
| Form 990, Part V, Line 3b Reason for not filing Form 990-T | The 990T is on extension awaiting final K-1 investment information necessary to prepare a complete and accurate return. |
| Form 990, Part VI, Line 11b Review of form 990 by governing body | The Society's Form 990 was prepared by tax and financial staff at the Society, and was reviewed by senior management, including the CEO, President and Chief Legal Officer. It was also reviewed by the Society's outside tax advisors. A draft of this Form 990 was provided to the full Board of Trustees for comments and questions before it was filed with the IRS. |

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| Form 990, Part VI, Line 12c Conflict of interest policy | The National Geographic Society maintains a Code of Ethics stating the Society's expectation that staff (employees), officers and third party representatives (including independent contractors, consultants, business partners and others who support our mission or receive our funds), will perform their responsibilities in a manner consistent with the highest standards of ethical conduct. The Code of Ethics is published internally, and on the Society's public facing Website https://www.nationalgeographic.org/ethics/. The Code of Ethics is rooted in the Society's commitment to carry out its mission in a manner that earns the respect of everyone we interact with including charitable donors, business associates, third party representatives, Society members, our staff, explorers, fellows, grantees and the general public. In recognition that accomplishing this objective depends on the individual commitment of our staff and business partners to acting with personal integrity, the following core principles apply: (1) we will conduct every aspect of our business in a fair, lawful and ethical manner; (2) we will encourage and expect everyone we work with to do the same; and (3) we will maintain a culture that reinforces these principles. The Code of Ethics includes the Society's Conflict of Interest Policy, which (1) defines potential conflicts of interest and provides several illustrative examples; (2) requires disclosure of any potential conflict to the Society; and (3) prohibits a conflicted staff member from engaging in any activity or decision-making concerning a potential conflict of interest in the absence of disclosure and independent resolution (including recusal and other steps deemed appropriate to resolve the potential conflict) by the Society, as set forth as follows in the terms of the policy itself: Avoid Conflicts of Interest A conflict of interest arises when you, a family member, or a close friend has a business, financial, or personal interest in the other side of a transaction or business dealing with the National Geographic Society. You must always act in the best interest of the Society. This includes being sensitive to situations where it might appear that your responsibility to the Society has been compromised. Here are some ways a conflict of interest might arise: Having a personal, family, or financial interest in any Society transaction Acting as an employee or consultant for, or providing any other assistance to, a competitor Having a financial interest in a competitor, supplier, contractor, grantee, fellow, consultant, or other business partner Hiring or supervising a family member Accepting gifts, discounts, or services beyond policy limits from anyone doing (or seeking) business with the National Geographic Society Most potential conflicts can be resolved in a simple and mutually acceptable way. The key is to disclose the issue promptly-before it becomes an actual conflict that could compromise your responsibility to act exclusively in the National Geographic Society's best interest. If you have a potential conflict of interest, you must report it to your manager-before you engage in any activity related to the situation. Your manager, in consultation with you, Human Resources, and Law Business Affairs, will determine what measures should be taken to resolve it appropriately. Such measures typically include recusing yourself from any decision relating to the matter. If you are unsure but have questions, get help from your manager, Human Resources or the Society's ethics officer. Gifts and Gratuities Staff members may not receive any gift worth more than $100 from any person or organization doing business with the National Geographic Society. Staff members involved in purchasing decisions must take extra care to avoid any gifts that might affect, or appear to affect, their decision-making responsibilities on behalf of the National Geographic Society. Additionally, the Society's Code of Ethics expressly prohibits bribery and all other forms of corruption; sets standards for conducting diligence and for approval of certain third party business relationships; and mandates reporting of any potential issues to the Society's Ethic's Officer, or other designated Society representative as set forth in the Code of Ethics: Corruption and Bribery - Strictly Prohibited Every country we work in has laws against corruption and bribery. We take compliance with these laws seriously. As a U.S.-based organization, the National Geographic Society focuses particular attention on the anti-bribery standards of the U.S. Foreign Corrupt Practices Act. We may not offer, promise, pay, give, or approve any bribe, kickback, or other inducement in the form of cash or anything else of value (such as gifts, travel, entertainment, or charitable contributions) to any person or organization with the intent to exert improper influence over the recipient, induce the recipient to violate their duty of loyalty, secure an improper advantage for the National Geographic Society, or improperly reward the recipient for past conduct. Nor may we allow any third party representative (such as customs clearance brokers, independent contractors, consultants, business partners, or anyone else) to do so on our behalf. Our Anti-Corruption policy sets standards that must be followed in our relationships with explorers, fellows, grantees, third party representatives, field workers ('fixers'), exhibitors, and recipients of charitable donations. Additionally, there are special standards that apply to our interactions with government officials (including travel, accommodations, meals, and entertainment). If you think that an improper payment has been solicited, offered, or made, you must promptly report it to the ethics officer, or another contact listed on the last page of the Code. The Society requires each of its employees including its officers to complete a business conduct certification (referred to as the Society's 'Ethics and Policies Pledge') as a condition of continuing employment annually. Each staff member is required to affirm that: * I have read and I understand my obligations under the National Geographic Society's Code of Ethics. I agree to comply with the Code, the Society's policies, and laws that apply to my responsibilities on behalf of the Society. * I understand that I am obligated to report all potential Code, policy or legal violations I am aware of. I am familiar with the options available to me for asking questions or reporting a potential violation. * I am not aware of any potential violation, or I have reported all potential violations that I am aware of. (A staff member who is aware of an unreported potential violation is prompted to report it prior to completing the certification.)" The Society maintains an Ethics Helpline operated by an independent third party for reporting potential violations or asking questions concerning the Code of Ethics, the Society's policies and/or legal compliance. The Helpline is available 24 hours a day, seven days a week. The Helpline accepts email, web-based and automated phone line submissions, and also offers the option of speaking to a customer service representative. The Helpline accepts anonymous reports and allows an individual who makes a report to receive follow up communications even if he/she chooses to remain anonymous. The Society maintains a separate Code of Ethics for its Directors and Trustees, which is based on the same core principles as the Code applicable to the Society's staff and third party partners, and grounded in the same commitment to maintaining the highest standards of ethics and personal integrity. It includes a Conflict of Interest policy applicable to Directors and Trustees specifically, which mandates disclosure of potential direct or indirect material conflicts involving Board-level decisions, as well as recusal from decision-making and voting on a conflict matter. The Society's Board members may contact the General Counsel or Ethics Officer with questions or concerns, and may also avail themselves of the Society's Ethics Helpline. Each Board member submits a Conflict of Interest Certification annually certifying that: there are no conflicts of interest (or disclosing potential conflicts if any may exist); and committing to continuing disclosure should a conflict arise subsequently. |
| Form 990, Part VI, Line 15a Process to establish compensation of top management official | The Board of Trustees of the National Geographic Society has delegated authority to the Compensation Committee to oversee the compensation and benefits of certain senior executives of the Society. The Committee, which is composed exclusively of independent members of the Board of Trustees, is responsible for overseeing an executive compensation program for the Society's senior executives. The Committee follows the procedures set forth in the IRS regulations under Section 4958 in making compensation decisions. In particular, the Committee engages an independent compensation consultant to prepare and present comparable market data with respect to the Society's cash compensation and benefits programs, and is also advised by outside counsel. The Committee reviews the performance of senior executives and evaluates their compensation and benefits in light of the comparable market data provided by the independent compensation consultant and other relevant factors. The Committee relies on such market data in awarding cash compensation and reviewing benefit programs for the Society's senior executives, and receives an opinion from the independent compensation consultant as to the reasonableness and comparability of the Society's executive compensation and benefits programs to that provided for similar services by similar organizations under similar circumstances. The Committee documents its decisions regarding executive compensation decisions in its minutes. The Chair of the Committee promptly reports all actions taken by the Committee to the full Board of Trustees. |

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| Form 990, Part VI, Line 15b Process to establish compensation of other employees | The Compensation Committee followed the process described above at meetings held in March September of 2022 with respect to compensation decisions for the following senior executives positions: CEO, President, CFO, Chief Advancement Officer, Chief Legal Officer, Chief Communications Officer, and Chief Education Officer. The compensation committee also held an ad-hoc meeting in April 2022 to approve a termination of the incentive plan for all staff except for the CEO President. |
| Form 990, Part VI, Line 19 Required documents available to the public | The Society's corporate charter is available to the public through the District of Columbia Department of Consumer and Regulatory Affairs Corporations Division. The financial statements of the tax-exempt parent, the National Geographic Society, are made available in this Form 990. The Society does not currently make its audited financial statements available to the public because they are issued on a consolidated basis, which include financial details of the activities of Society's taxable subsidiary which are not disclosed for competitive reasons. The Society's Forms 990 and 990T are available upon request, as well as online at Guidestar.org. |
| Form 990, Part IX, Line 11g Other Fees | OTHER PROFESSIONAL FEES - Total Expense: 33050858, Program Service Expense: 30473439, Management and General Expenses: 2577419, Fundraising Expenses: ; |
| Form 990, Part XI, Line 9 Other changes in net assets or fund balances | Post-retirement Benefits-FAS 158 - -12289177; Grants cancelled/returned - 254037; misc. adj. - -99870; |

**For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.** Cat. No. 51056K **Schedule O (Form 990) 2022**

efile Public Visual Render | ObjectId: 202331359349311078 - Submission: 2023-05-15 | TIN: 53-0193519

**SCHEDULE R (Form 990)**

Department of the Treasury
Internal Revenue Service

# Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047
2022
Open to Public Inspection

Name of the organization
NATIONAL GEOGRAPHIC SOCIETY

Employer identification number
53-0193519

**Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

| (a) Name, address, and EIN (if applicable) of disregarded entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Total income | (e) End-of-year assets | (f) Direct controlling entity |
|---|---|---|---|---|---|
| (1) NG URL HOLDING LLC<br>1145 17TH ST NW<br>WASHINGTON, DC 20036 | HOLDING COMPANY | DC | 0 | 0 | NATIONAL GEOGRAPHIC SOCIETY |

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Exempt Code section | (e) Public charity status (if section 501(c)(3)) | (f) Direct controlling entity | (g) Section 512(b)(13) controlled entity? Yes | No |
|---|---|---|---|---|---|---|---|
| (1)NG Foundation for Sci Ex (Asia) | grant making | KS | 501(c)(3) | 8 | National Geographic Society | Yes | |





**Part III Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Direct controlling entity | (e) Predominant income(related, unrelated, excluded from tax under sections 512-514) | (f) Share of total income | (g) Share of end-of-year assets | (h) Disproprtionate allocations? Yes | No | (i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | (j) General or managing partner? Yes | No | (k) Percentage ownership |
|---|---|---|---|---|---|---|---|---|---|---|---|---|

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Direct controlling entity | (e) Type of entity (C corp, S corp, or trust) | (f) Share of total income | (g) Share of end-of-year assets | (h) Percentage ownership | (i) Section 512(b)(13) controlled entity? Yes | No |
|---|---|---|---|---|---|---|---|---|---|
| (1)NGSP INC | HOLDING CO. | DC | NATIONAL GEOGRAPHIC | C Corporation | 55,000,000 | 1,213,027,707 | 100 % | Yes | |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 1145 17TH ST NW<br>WASHINGTON, DC 20036<br>16-1750687 | | | SOCIETY | | | | | | |
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**Part V Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

| | | | Yes | No |
|---|---|---|---|---|
| | **Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule. | | | |
| **1** | During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV? | | | |
| **a** | Receipt of **(i)** interest, **(ii)**annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity | **1a** | Yes | |
| **b** | Gift, grant, or capital contribution to related organization(s) | **1b** | | No |
| **c** | Gift, grant, or capital contribution from related organization(s) | **1c** | | No |
| **d** | Loans or loan guarantees to or for related organization(s) | **1d** | Yes | |
| **e** | Loans or loan guarantees by related organization(s) | **1e** | | No |
| **f** | Dividends from related organization(s) | **1f** | Yes | |
| **g** | Sale of assets to related organization(s) | **1g** | | No |
| **h** | Purchase of assets from related organization(s) | **1h** | | No |
| **i** | Exchange of assets with related organization(s) | **1i** | | No |
| **j** | Lease of facilities, equipment, or other assets to related organization(s) | **1j** | | No |
| **k** | Lease of facilities, equipment, or other assets from related organization(s) | **1k** | | No |
| **l** | Performance of services or membership or fundraising solicitations for related organization(s) | **1l** | Yes | |
| **m** | Performance of services or membership or fundraising solicitations by related organization(s) | **1m** | | No |
| **n** | Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) | **1n** | | No |
| **o** | Sharing of paid employees with related organization(s) | **1o** | | No |
| **p** | Reimbursement paid to related organization(s) for expenses | **1p** | | No |
| **q** | Reimbursement paid by related organization(s) for expenses | **1q** | | No |
| **r** | Other transfer of cash or property to related organization(s) | **1r** | | No |
| **s** | Other transfer of cash or property from related organization(s) | **1s** | | No |

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

| **(a)**<br>Name of related organization | **(b)**<br>Transaction type (a-s) | **(c)**<br>Amount involved | **(d)**<br>Method of determining amount involved |
|---|---|---|---|
| **(1)**NGSP Inc | F | 55,000,000 | AUDITED FINANCIAL STATEMENTS |
| **(2)**NGSP INC | A | 827,366 | AUDITED FINANCIAL STATEMENTS |
| **(3)**NG FOUNDATION FOR SCI EX (ASIA) | L | 88,944 | AUDITED FINANCIAL STATEMENTS |
| **(4)**NGSP INC | L | 6,070,000 | AUDITED FINANCIAL STATEMENTS |
| **(5)**NGSP Inc | D | 17,795,000 | AUDITED FINANCIAL STATEMENTS |
| | | | |

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**Part VI Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

| **(a)**<br>Name, address, and EIN of entity | **(b)**<br>Primary activity | **(c)**<br>Legal domicile (state or foreign country) | **(d)**<br>Predominant income (related, unrelated, excluded from tax under sections 512-514) | **(e)**<br>Are all partners section 501(c)(3) organizations? | | **(f)**<br>Share of total income | **(g)**<br>Share of end-of-year assets | **(h)**<br>Disproprtionate allocations? | | **(i)**<br>Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | **(j)**<br>General or managing partner? | | **(k)**<br>Percentage ownership |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | **Yes** | **No** | | | **Yes** | **No** | | **Yes** | **No** | |
| | | | | | | | | | | | | | |
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**Part VII** **Supplemental Information**

Provide additional information for responses to questions on Schedule R. See instructions.

| Return Reference | Explanation |
| --- | --- |

Schedule R (Form 990) 2022

## Additional Data

Return to Form

**Software ID:** 22016089
**Software Version:** 2022v5.0