



Annual Report to the Philanthropy New York Board: 2021

January 4, 2022

Introduction

The end of a 5 year journey, the beginning of a new phase of our work:

This is the last year-end report that chronicles the journey of [PNY's Five Year Strategic Plan of 2017-2021](#). We crafted that plan at a moment when we had raised \$4.5 million from our membership, secured new office space, launched a Fellowship program and finally had the resources to invest deeply in building PNY's capacity for facilitation, curriculum development and policy work. We had no idea that so many new opportunities and transitions would arise when this board voted to approve the plan. In five years, this organization navigated a move to the Ford Foundation Center for Social Justice, built extraordinarily popular learning platforms and curricula, reimaged our institutional values, traversed the leadership transition of our President (both at PNY and nationally!), and responded to a worldwide pandemic coupled with a national call to racial justice.

What has held true throughout the last five years is this organization's unwavering promise to provide a community of philanthropic professionals with timely information, peer to peer support and the resources needed to adapt and evolve their practices. In 2021, we saw our members accessing and shaping peer spaces and leading more difficult and meaningful conversations. In addition to the increases in attendance you will see outlined in this report, there was also a deeper willingness this year for our members to leverage their peers as coaches and sounding boards. Leaders of our networks and working groups guided conversations with an emphasis not just on the "what" our members do, but also the "how" and "why" they do it.

Perhaps the most meaningful shifts that we have experienced this year are those that are most difficult to capture in a report like this. They are the shifts that happen when our members accept the invitation we have extended at Philanthropy New York, to move into a mindset and posture to engage in a different kind of work — the work of building a new set of practices that are essential to the creation of a more equitable, sustainable, and democratic society.

As is past years, we have sought to align the work we have done this year with the structure of the 2017-2021 Strategic Plan. This report will not capture all of the work that happens in PNY's world, but should offer you a highlight of some of the most challenging and rewarding moments in 2021. Please enjoy reading this analysis, and we will look forward to providing you with operational reports on our membership and finances/administration at the end of January!

PNY's Values at Work in 2021

PNY's values continue to shape and inform both how we as staff think about the work and the ways that our community comes together.

Community Support: We worked with leaders throughout philanthropic institutions who were grappling with intensely difficult decisions around the role that equity and power in decision-making play in return to office plans and office policies and practices. Philanthropy New York's peer networks and capacity building programs provided spaces for leaders positioned throughout foundations to provide peer to peer coaching and share the values that were guiding decision making.

Leading in Partnership: Virtual programming allowed us to partner with foundations, experts, and leaders across the nation to better inform critical conversations around foundation payouts, corporate DEI work, and to shape our dynamic Annual Meeting theme. We also found that PNY staff were able to contribute to field-wide learning by sharing the ways we were thinking about and shifting our own practices and policy ideas. 2021 was also a remarkable year on the policy front. Our membership trusted PNY to reimagine and reframe our leadership position within NYC politics. With the support of our members, we will shape a more emphatic sector voice and partnership with the incoming Mayoral Administration in 2022.

Learning through practice and reflection: Internally, this year was characterized by brave and bold conversations among the PNY staff and board. Conversations around our governance and nominations processes, our own accountability to racial equity work on this board and our willingness to try new ways of showing up in vendor recruitment processes all ensured that we were continually learning and iterating as an organization.

Centering equity in conversation: 2021 offered us an opportunity to more clearly and insistently articulate equity messages in our member communications. We began to shape a new voice in our CEO messages and to develop a responsive muscle around critical newsworthy issues that reverberated among members and their grantees. We invited our members into our own learning cycle and provided our analysis and that of our partners in the field to inform members' decisions around timely and relevant societal issues.

Strategic Plan Goal 1 - *Distill and highlight innovative sectoral practices that build a stronger philanthropic ecosystem*

Recognize and analyze emerging trends and interpret them for our membership in a way that is relevant, useful and actionable.

In 2021, Philanthropy New York worked to leverage members' desire for racial equity learning into useful and actionable learning opportunities. We focused not only our Annual Meeting, but a whole slate of follow-up programming and communications on helping connect members to partners, peers and learning communities to enrich our members' critical analysis of racialized issues and to help them develop their practices around racial equity. In addition, 2021 was a year in which members had to focus on meaningful culture and staff engagement as they looked to navigate a return to office after more than a year of remote work. These themes emerged in the CEP member engagement survey and were central in our programming.

Helping members navigate racial reckoning: In 2021, we continued to help members grapple with the acute inequities laid bare by the ongoing public health crisis and traumatic incidents of racialized violence. Our 42nd Annual Meeting – *Looking Back, Moving Forward: A Time of Reckoning* – offered multiple interactive entry points for our membership, including invitations through poetry, PhilTalks, and academic presentations. The meeting was followed by a series of programs that provided a critical analysis of systemic inequities in housing and asset management, the importance of building multi-racial coalitions, and how to adopt more equitable practices in grantmaking. These included:

- [At Long Last: Redressing and Repairing Racial Segregation](#)
- [Moving Beyond Anti-Asian Myths and Violence to Multi-Racial Solidarity and Action](#)
- [A New Frontier - Racial Equity in the Asset Management Industry Today](#)
- [Equity and Evaluation: Can We Embrace Both in Collecting Demographic Data?](#) in collaboration with PEAK Grantmaking.
- We ended the year with a special members only Building Racial Equity training from Race Forward for members who wanted to engage in better understanding key concepts around racial equity and structural racism.

We better utilized our communications platform to help members contextualize flash point issues, centering and lifting the voices of our partners and members who routinely provide highly specialized resources on racialized issues. In March, we released a [statement on Anti-Asian bias](#) to both help members understand the context for the brutal murders in Atlanta and connect them to the work of our peers at AAPIP. This summer, we joined our partners ABFE and PRE to discuss how [Critical Race Theory](#) has been used as a tool of disinformation and to emphasize its importance as a tool in grantmaking analysis for funders who want to achieve more systemic impact.

Exploring shifts in practice and culture: If 2020 was the year we all had to abruptly learn how to “pivot” and “adapt”, 2021 was the year that foundations and many other organizations realized that these adaptations and changes were leading to a fundamental shift in practice and culture. Grappling with those changes and what they meant were key themes in programming and network gatherings.

- **Shifting organizational culture** – From changing legal policies to office re-opening considerations, we helped members navigate both the practical and change management considerations in their work. From June's [Reopening, Hybrid Work, and Why are the Guidelines Constantly Changing? Aaaaarrrrgh!](#) to October's [Integrating DEI from “A Thing We Do to How](#)

[We Do All Things,](#)” PNY provided spaces for members to grapple with questions of safety, culture, and change management.

- **Aligning organizational practice** – We offered an impact investing 101 session, [Impact Investing, Picking Up Where Philanthropy Leaves Off](#), to help members demystify impact investing practices. We also hosted conversations like [Investing in Nonprofit Mergers, Acquisitions, and Other Models: What is the True Cost?](#) and [New Leaders, New Opportunities: What Does This Moment Demand From Foundations?](#), among others, for members exploring better ways to show up for nonprofits.

Engage members in smaller cohorts or collaborations around important trends and issues such as impact investing, equity and inclusion, and transparency in an effort to discuss and interpret these issues and develop ways to implement them more fully.

Implementing change in PNY board practices: This year, when we reflect on the work we did to interpret key issues and implement them more fully, the work that this Board did to implement racial equity commitments into the governance structures and learn from that work is front and center. The Board undertook intensive work that resulted in the Executive Committee accepting accountability for racial equity work across committees. And, each committee endeavored to change both the internal ways that the work is conducted and the structural policies and activities of the institution. This work, while internal, continues to function as a community of practice.

Below are the goals that each Board committee is undertaking for the 2021/2022 year:

- **Finance** - The committee agreed to move additional funds into Industrial Bank, a Black-owned institution. The total of PNY’s savings in the bank is now \$500,000. The committee would also like to undertake a process to examine the feasibility of moving the organization’s small investment account of \$3.5M to a Black-owned asset management firm that can provide similarly cost-effective and low risk strategies as our current portfolio.
- **Audit** - Following an intensive RFP process that included extensive research to identify minority-owned firms and weave DEI questions into the process to assess appetite and competency around racial equity and inclusion efforts, the audit committee elected to continue using Condon O’Meara. As a condition of their ongoing work with PNY, the firm committed to engage in training across the firm and action to identify policies and practices that the firm should change in service to greater equity and inclusion.
- **Governance and Nominating** - Last year, the Committee codified the process of asking racial equity readiness questions of candidates and sharing questions in advance so that candidates could be thoughtful about the work we were asking them to undertake as board members. This year, the Committee would like to open interviews with a moment of reflection meant to address the role of board members as ambassadors for racial equity work within their own institutions. The Committee, with guidance from the Board, is also committed to broadening the definition of diversity currently used to identify potential board members. Using a “race and” lens, the committee will seek to include the voices of those who have less positional power and authority and may have less professional experience than previously required for board leadership. In service to this goal, the Committee will explore ways to build a pipeline of potential board members starting with programs that intentionally engage younger and less experienced professionals (PNY’s Young Leaders Breakfast Club and Essential Skills and Strategies programs) as entry points.
- **Public Policy Committee** - This year, the Public Policy Committee undertook its first racial equity training and will be exploring the following lines of inquiry to develop a commitment for the year ahead:

- What voices are represented on this committee? Should this Committee invite new voices in to ensure different lived perspectives inform policy conversations?
- What additional voices need to inform our slate? Should this Committee begin to invite social justice policy organizations into the review of the slate each year?
- What kind of racial equity lens or impact review should we conduct on our policy slate? Can the committee develop a set of questions/criteria that guide decisions on whether or not we take a stance on a policy issue?
- **Committee on Members** - The Committee is focused on the internalized and interpersonal aspects of racism and is creating meeting agendas that invite folks to bring their full selves to discussions.

Collaborate with the Forum of Regional Associations and our colleague philanthropic service organizations to share information and build programming and tools around promising practices.

Expanding member learning through sector partnerships: This year, 52 of the 303 programs and meetings we convened were the result of partnerships with our fellow national philanthropy-serving organizations. These partnerships are critical to PNY's ability to provide information on timely issues and they expand the topics we are able to address for our membership. Sector partners offer critical analysis and deep expertise in both issue-based content (such as immigration, food insecurity, and the census) and in issues specific to certain types of foundations (family foundations, small foundations). In addition, partnerships with identity-based PSO's ensure that we are able to provide our members with specialized resources on entrenched racialized disparities and strategies to address them.

Contributing to Sector Understanding and Change: Sector partnership is not just about the collaboration that adds to PNY's programming, it is also about how PNY can contribute to our partners in the field. Throughout 2021, we have taken a markedly more vocal approach to support efforts that bridge understanding between the nonprofit and philanthropic sectors and support an equity analysis in program and policy work.

- Kathryn kicked off the year as a panelist in [FPWA's Annual Meeting](#) and then developed a two-part series exploring racial equity work inside PSO's with colleagues from Grantmakers in the Arts and Southern California Grantmakers. Part one was [Internal Racial Equity Work in PSOs: Reflections from the Network](#) and Part two was The Deep End of the Pool the [Forum's Series on Racial Equity practices in PSO's](#).
- Yi-Ching's experience working with partners from Marga Consulting to create our first Racial Equity Learning exchange was shared throughout the Forum network in her panel presentation, [Racial Equity Learning Exchange Series Informational](#).
- Marlon served an important outward facing role with several policy partners this year. He and Kimberly Roberts (now with ABFE) worked with Nonprofit New York to design [Philanthropy, A Primer](#), to help nonprofit partners better understand the nuanced landscape of philanthropy in an attempt to create a richer conversation around the philanthropic reform proposals that have recently been introduced. He also provided critical racial equity analysis to recent federal policy proposals in the [Independent Sector Upwell Conference](#), and was featured as a panelist in [Non-Profit New York's Annual Meeting](#).
- In addition to this programming, PNY leaders are contributing to our sector's work through board and Committee memberships. Kristen Ruff has joined the United Philanthropy Forum's

Board of Directors, and Yi-Ching Lin has joined the Korean American Community Foundation's 2021 Community Grants Committee.

Invest in the development of enriched communications platforms that help members connect on timely issues, best practices and illuminate important trends.

Deepening our investment in the ways we communicate with members was a key focus in 2021. We looked to both enhance our use of the tools we already had and shape new outreach and engagement opportunities with our members.

Deepening our virtual platform tactics to build connection and learning: We focused intently in 2021 on the ways we could leverage virtual tools to create community and learning in our programs, networks and working groups. We invested in PNY staff's professional development in facilitation, and in the use of virtual tools that build more interactive spaces. The PNY team has become adept at integrating a host of virtual platforms into the facilitation of our meetings and programs. For example:

- We use Google sheets to allow for real-time collaboration and organizing of thoughts
- We use JamBoard and Padlet to allow participants to anonymously contribute thoughts and to allow everyone in a meeting to see key themes and take away learnings in real time.
- We use Sli.do, Polleverywhere and Zoom polls for anonymous polls, feedback/input on session topics or direction, and real-time voting;
- And, Zoom breakout rooms have become a favorite across networks and programs as they allow for more intimate peer to peer discussions and networking

Highlighting and curating content for our members: In 2021, we continued to experiment with communications vehicles that reflect content that is values aligned and supports member practices. We crafted a [member video](#) to frame the annual meeting theme of reckoning. Senior staff [co-authored an Insights piece](#) to make the connection between Critical Race Theory and the lens PNY holds in our programming. We also focused on amplifying learning from key programs that strongly reflected PNY's commitment to transforming philanthropic practice in service to equity. For example, we produced two post-program communications vehicles: one highlighting key takeaways from our annual meeting and another compiling the lessons of our public policy series. The latter allowed us to extend learnings from a series that is only offered every 24 months.

Shaping a new leadership voice: Communications in a moment of transition is critical, and this year, PNY sought to introduce new leadership through quarterly personal and [substantive CEO messages](#). We used the vehicle as an opportunity to articulate my commitments as a new CEO, name PNY's vision and evolving practices around anti-racist organizational change, and demonstrate how we at PNY are trying to put our own learnings into action.

Experimenting with new tools to reach our audience: We expanded our knowledge and use of Mailchimp features to reach more members and were excited to see an increase in open rates as a result. We regularly tested subject lines to increase open rates. We utilized audience based segmentation to tailor messaging and content to members based on their engagement with PNY thus far. (For example, if a member had never been to our annual meeting, they received an email invitation that was more introductory than a member who regularly attends.) We began resending campaigns to folks who have not opened mailers to increase awareness among folks who don't regularly open our communications. For 2021, the range of open rates was 17.2% - 44.5%, after implementing these new learnings, we saw that these higher open rates were consistent over time. To compare, 2020 saw an open rate range of 16.8% - 39.7% and 2019 had a range of 15.3% - 62.1%.

Exploring new media platforms to expand our leadership throughout the nonprofit and philanthropic ecosystem: We established a modest organizational presence on [LinkedIn](#) and I ramped up my personal engagement on the platform. We also dipped our toe in paid promotions on LinkedIn to specifically reach large staffed foundations where we have less personal touch. Social promotion drove about 10% of our traffic to the annual meeting event page on our website. This increased traffic to our website was encouraging and, as a result, we will explore the potential impact of paid promotions as part of a broader strategic communications strategy.

Strategic Plan Goal 2 - Enhance our successful network and cohort based professional development opportunities that develop new individual leadership skills

Develop new professional networks for program staff around the skills of grantmaking, and the leadership skills needed to direct grantmaking programs.

As you can see from the framing of this goal, we were originally focused on the “skills needed to make grants and direct grantmaking programs.” What we have learned in the last five years of developing and nurturing networks and cohorts is that self-reflective learning and peer to peer leadership are some of PNY’s most powerful tools in shaping and shifting how this sector thinks about its work. And, a focus on grantmaking requires the engagement of stakeholders at every level of the organization.

Engaging Trustees in Purposeful Conversation: We hosted one virtual trustee salon in June with Dimple Abichandani (Executive Director) and Robin Snidow (Board Chair) of General Services Foundation. The choice of speakers and topic (re-imagining how foundations approach spending policies) reflected our desire to challenge conventional wisdom around foundation governance and continue to work to bridge the values-aligned programming we’re doing for foundation staff and the trustee-focused programming.

Supporting Philanthropic CEO’s in their Leadership: We have seen participation in our CEO peer networks almost double since the pandemic began. Total attendance was 180 in 2019, 286 in 2020, and 334 in 2021. We regularly heard this year that folks were grateful for the peer community as they navigated complex and uncertain territory and decision making. Over the year, the conversations shifted from tactical (who’s doing what) to reflective (what values are informing decisions).

Explore collaborative opportunities to build rich leadership trainings for diverse mid-level philanthropic leaders to prepare the sector’s future leadership.

Pivoting our Program Officers as Champions programming: Our pilot offering of this new leadership program for experienced program officers and directors began in February 2020 and then had to undergo significant adaptations to the timeline, scope, and program execution in a virtual set-up. We convened informally for several months to help the group stay connected and then in the fall of 2020, redesigned the original 5 day-long sessions into 5 half-day sessions. The biggest challenge was right-sizing the curriculum to match the limited bandwidth folks had, while maintaining a rigorous leadership program that invited folks into their stretch zones. We started with 15 program officers and ended with 11 due to job changes over the year. Overall, the core purpose of the program – to support experienced program staff build capacity for reflective practice, peer-to-peer learning, and mobilizing for impact – was well aligned with the leadership challenges participants faced in their work in 2020. While the flow of the program was a 180 degree pivot from what we designed, participants ultimately generated significant insights into their own leadership strengths and tension points.

Connecting young leaders virtually: After delaying the launch of our planned 2020 YLBC cohort, we launched our first virtual YLBC cohort at the beginning of 2021 with 30 young leaders and 10 mentors. The core themes this year were flexibility in structure and meeting folks wherever they were. YLBC always attracts folks on the cusp of various life transitions and folks trying to make sense of who they are in this field and how they want to contribute. That was even more present this year. Given how stretched young leaders were in their bandwidth, we weren’t able to cultivate as strong a sense of community across the full cohort but consistently heard that the small groups were places of strong relationship building and support.

Continue to enhance our unique skills-based intensive training for new grantmakers and seek to expand and develop new training for experienced grantmakers

Launching our digital E-Learning platform: In 2021, we launched our Philanthropy Fundamentals Online (E-Learning) with seven institutional partners. Philanthropy Fundamentals brings on-demand learning to staff new to the field and supports members in onboarding staff. The launch was a significant accomplishment and we are fielding questions about when the curriculum and platform will be available to the full PNY membership, as well as our sister regional associations and philanthropy-serving organizations. The biggest hurdle and learning this year was the need for dedicated communications planning to build awareness about the program and drive participation. Recognizing this later in the year, we recently engaged Asibey Communications to develop a communications strategy to increase participation among current subscribers, then roll-out to our membership, and eventually beyond.

Aligning our Essential Skills and Strategies for New Program Officers course to a new digital reality: We offered our first virtual ESS in 2021. Members joined from New York to Atlanta to Kampala, Uganda – bringing an added range of regional experiences to the conversations. The revised format of 13 short sessions over two months (instead of three full days over three weeks) supported folks in putting their learning into practice in real time because we were covering smaller pieces of content each time. One lesson learned was the intention we had to bring to the composition of breakout groups so that folks ended the program having met almost everyone in the cohort. We couldn't rely on the casual breakfast time we traditionally had in-person where folks could informally chat with peer participants. The one significant challenge we encountered was that breaking the program into shorter, but more, individual sessions resulted in more scheduling conflicts.

Invest monetary and human resources in the development of a diverse next generation of philanthropic practitioners through our Public Policy Fellowship for emerging young graduate students.

The newly renamed “Philanthropy Fellowship” is a two-year engagement and 2021 was the year that we supported our departing Fellows in making their next career move. Philanthropy New York “graduated” two fellows into positions within the philanthropic sector. Shamira Lukomwa secured employment at member ELMA Philanthropies as a Program Associate. Kimberly Roberts joined ABFE as their new Manager of Networks and Partnerships. We now have a total of five former fellows who are actively engaged in shaping the philanthropic sector. In fact, every Fellow who has come through the program has continued to work in and around the philanthropic sector.

Identifying our 2021 – 2023 Fellows: We undertake a rigorous and high-touch recruitment effort and interview process to identify Philanthropy Fellows. This year, following that process, Ariane Cruz and Javon Robinson joined the PNY team. They quickly began to shape issue-based collaboration between members, develop relevant, high-quality events and programs, and support government engagement efforts. Javon's work includes the coordination of both the Health Policy and Environmental working groups as well as our new initiative to engage with the incoming Mayoral Administration. Ariane Cruz's fellowship work includes the coordination of the Youth and Education Funders and Justice Reform working groups as well as our soon to be launched Racial Equity Working Group.

Strategic Plan Goal 3 - Cultivate and catalyze institutional leadership around public policy, advocacy, and collaboration in the sector

Strengthen PNY's role in developing and advocating for public policies that widely affect the philanthropic and the nonprofit community. At the same time, PNY will clearly communicate its expanded policy mandate to its membership and the nonprofit community as well as the updated process by which it will consider official positions.

Advocating for policies that widely support the nonprofit community: In early 2021, as nonprofits continued to sound the alarms for the increasingly alarming effects of the pandemic and the disproportionate health and economic outcomes within marginalized communities, PNY partnered with Nonprofit New York to advance policies to give nonprofits greater freedom to lobby on behalf of their clients and communities. City Councilmember Fernando Cabrera introduced [Int.2148-2020](#), which would raise the City's "lobbying threshold" to \$10,000. Philanthropy New York approved a policy statement allowing us to join the Place at the Table campaign. We continue to work with Nonprofit New York to see this threshold raised at both the City and State level.

Develop new training for our members in policy and advocacy to support organizational leadership in tackling the specific issues of greatest concern to our members.

Supporting leadership on issues that matter most to our members: Our working groups continue to be a robust mechanism for ensuring that our members are able to work in partnership to tackle specific issues such as Health, Education, Justice, and the Environment..

- **The New York City Youth and Education Funders** held monthly meetings throughout 2021 and hosted nine programs on topics ranging from [preparing students for the evolving technology workforce](#) and using [tutoring interventions to address learning loss due to the pandemic](#), to [how sports and arts can support youth social and emotional learning](#) and the [impact of the new City and State budgets on youth services and Pre-K-12 education](#). In our working groups, co-chairs and members have invited guests to speak from organizations such as PASE, and United Neighborhood Houses, Department of Education, and CUNY.
- **The Justice Reform Working Group** met throughout 2021 to discuss their work and additionally hosted two programs: [what the incoming NYC administration means for justice reform](#) and [The Philly DA: Advancing Criminal Legal Reform from the Inside Out](#). The latter was done in partnership with [Media Impact Funders](#) and [Philanthropy for Active Civic Engagement \(PACE\)](#).
- **The Health Working Group** met monthly throughout 2021 to share real-time updates on COVID-19 and related responses amidst NYC's changing healthcare landscape. The group also held programs around various topics, including the impact of the Biden administration's health policy on healthcare in NYS and NYC, the need for [effective coordination between healthcare technology systems and community-based social service organizations](#), and the [pandemic's impact on children's mental health](#), which was co-sponsored with the NYC Youth and Education Funders Working Group.
- **New York Environmental Funders Network** met throughout the year to discuss the impact of federal and state policies on the communities they serve. The group also received regular [updates on the Biden's Administration efforts to protect 30% of US lands and waters by 2030 through the America the Beautiful initiative and New York's 30x30 legislation](#). It also co-sponsored a program with the Environmental Grantmakers Association, Northlight Foundation, and the Surdna Foundation on accelerating the [movement towards a clean energy future](#).

Serve as a conduit for bringing together members that wish to advocate on critical issues of importance together.

Educating lawmakers: Every spring, PNY takes a group of members to Washington D.C. to meet with congressional offices and discuss a variety of issues of mutual importance as part of the Foundations on the Hill (FOTH) event. FOTH is an opportunity to inform and educate Congress about philanthropy, encourage legislators to view foundations as resources on key public policy issues, and advocate on issues affecting foundations and their nonprofit partners. This March, PNY engaged 12 members in virtual meetings with 12 Congressional and Senate offices to highlight philanthropy’s COVID-19 response in their districts and discuss how the pandemic has exacerbated homelessness, economic insecurity, and other issues in the communities they collectively serve. Participating PNY members included colleagues from the New York Community Trust, Trinity Church Wall Street, The Wallace Foundation, The North Star Fund, Altman Foundation, Korean American Community Foundation, Clark Foundation, and the Howard Gilman Foundation. We met with legislative staff from the offices of Senator Schumer, Senator Gillibrand, Representative Velázquez, Representative Meng, Representative Jeffries, Representative Clarke, Representative Espaillat, Representative Bowman, Representative Torres, Representative Ocasio-Cortez, Representative Jones, and Representative Nadler. PNY and members continued engagement with elected offices following FOTH through invitations to relevant programs and other conversations.

Amplifying member connection to a new Mayoral Administration and City Council: In 2021, PNY recognized the unique opportunity to “reset” local relationships with the incoming Mayoral administration and 38 new City Council members. Working closely with the Public Policy Committee, PNY crafted a collaborative effort among a number of interested members to reposition the organization as a trusted partner with insight, information, and relationships that will support politicians in shaping policy ideas and implementation. Working with members, PNY has crafted an outreach strategy that will build upon our traditional efforts to engage agency commissioners and Deputy Mayors and enhance that work with targeted relationship building and communications efforts with the support of a government relations firm. PNY has secured \$225,000 to support this 2 year effort. Guided by insight from the Public Policy Committee and a number of board and members, we are focused on

- Advocating for nonprofit contracting and payment reforms,
- Streamlining the interaction between philanthropy and the administration’s fundraising and grantmaking entities, and
- Building upstream approaches and early involvement of our members and grantees in City planning and program design.

Strategic Plan Goal 4 - Support long-term sustainability with a focus on enhancing member value

Analyze and evaluate fee-based services with a goal to create a suite of opportunities that draw on staff's expertise, expand the organization's leadership training, and monetize PNY's new space

Offering E-Learning as a fee based service: As mentioned above, we are excited to share our E-Learning offering more broadly amongst our membership. In 2021, the PNY team conducted benchmarking scans and discussions with stakeholders to develop a pricing structure that is aligned with PNY's values and membership dues philosophy. That structure will be previewed with the board in 2022.

Offering the E-Learning curriculum as an optional subscription in addition to membership is in alignment with the approach we have been developing for deeper engagements. PNY has structured these offerings such that the limited number of members who participate contribute additional financial resources to offset the significant expenses that PNY incurs to provide these programs. In addition to this alignment, we factored in short-term and long-term expenses to support the ongoing curriculum offering, as well as comparable pricing data from the sector. All members will continue to have access to our live Philanthropy 101 course as part of their membership.

Pursue opportunities to offer paid premium services to non-members who contribute broadly to the philanthropic space

Offering Philanthropy 101 and PNY CORE courses to non-member institutions: In the last two years, we have taken advantage of our transition to a virtual space by making our PNY Core programs (Philanthropy 101 and Financial Series) open to non-members outside of our region for a fee or to non-members in our region who are much earlier in their organizational development and not yet ready for membership. We drew on our value of an interdependent community to make these distinctions. For organizations that are in our region and able to be an active contributor and member of the community, we think it's important to hold membership as the primary financial structure since it creates a sliding scale roughly by financial ability to contribute. In 2021, we had two non-member institutions join Philanthropy 101 for \$2,000 (\$1,000 per two representatives for all 5 sessions) and three non-member institutions join Financial Series for \$4,000 (\$1,000 per two representatives for all 6 sessions).

Thank you for taking the time to read and reflect on a remarkable year and for your steadfast support of this team and the PNY community. We look forward to partnering with this board to set a new Strategic Direction to guide our continued work together in 2022 and beyond!