



## Philanthropy New York 2023 Year-end review

### **Introduction:**

I often begin these reports by asking “What have we learned this year?” In 2023, I was reminded that learning is not simply an “aha” moment. PNY has articulated our value of learning as *testing assumptions and challenging conventional wisdom in order to adapt and evolve practice*. This year, we did just that. Below are some of the ways that this team internalized and actualized learnings this year.

**Go slow to go together:** We set ambitious and oftentimes overlapping goals in every department in this organization. In 2023, we lived into the idea that our best work is done in collaboration with one another, and our best decisions are made in transparent and inclusive dialogue with one another. However, repatterning to do this requires a great deal of thought and planning. It also requires that we not set quite so many goals! In my self-reflection, I noted that we shifted timelines for the board evaluation, the pay equity analysis, and the compensation philosophy work, and that we decided not to even attempt to begin our goal around engaging movement leaders. All of these shifts and decisions were part of a larger need to make the time for inclusive processes rather than making top-down decisions.

**Center impact and ask ourselves “what does this mean for our leadership?”:** This learning applies internally to our work to repattern organizational culture, but it also applies to our external policy, communications, and programming work. PNY is not the only organization advocating for changes in wages and contracting. We are not the only organization looking to shift discussions around power in the sector. Sometimes, we are not best positioned to do things on our own, and centering impact requires that we ask how our leadership must take a different posture or approach. This has meant that we often collaborate rather than orchestrate. We partner on programming rather than designing it from scratch ourselves.

**Old habits die hard:** For more than 40 years, Philanthropy New York has taken a service orientation to our work. Now, our Strategic Framework has positioned us to cultivate leadership and accountability for change in the philanthropic sector. This requires re-defining our partnership with our members and building new working agreements within our community. Tensions emerge when member expectations or desires may be in conflict with the most purposeful or impactful course of action. We are working to build the skill for engaging in challenging conversations and establishing accountability practices as a team and with members.

This report will not be exhaustive. It is meant to help the board grasp the ways in which our work is fulfilling the commitments we made in our Strategic Framework. I have included a great deal of detail about our progress on internal organizational change management efforts in the self-reflection I am sending to the board as part of my performance evaluation. You have also seen a wonderful summary of some of the key external accomplishments we made in 2023 in the year-end [“PNY’s Year with You”](#) crafted for our membership. This report is meant to highlight a few key accomplishments and fill the gap between the two. I hope you will take a moment to enjoy it.

## **Strategic Framework Commitments and Progress:**

### ***Engaging in programs that address how power is structured and leveraged in philanthropy - including programming with trustees that encourages them to learn from one another:***

- PNY partnered with the National Center for Family Philanthropy to host a trustee salon to explore the unique governance challenges and opportunities for trustees of family foundations. The program featured Don Chen (President) and Carra Cote-Ackah (Board Chair) of Surdna Foundation.
- PNY presented [Acknowledging Inflation in our Grantmaking Practice](#), an interactive workshop for CEOs, CFOs, and Trustees to address inflation and share practices for acknowledging rising costs in their grantmaking practice. The session focused on strategies funders have adopted for supporting their grantees during times of high inflation and options funders might pursue to address institutional barriers to adaptive action.
- Our Public Policy Core series this year ended with a working session, [Walking the Walk: Leveraging Philanthropic Power for a Thriving Nonprofit Ecosystem](#), to identify how best to leverage the power of philanthropy and stand in allyship with nonprofits to ensure a thriving nonprofit ecosystem

### ***Ensuring that anyone exercising leadership within PNY's community structures is prepared to commit to equity in those spaces.***

- This year, we reimagined the curriculum for and expanded the audience of PNY's half-day racial equity training to encompass everyone serving on the PNY Board, a PNY Committee, and the co-chairs of all of PNY's issue-based working groups. Members engaged in learning and reflection, and ended the training by generating lines of inquiry that will help them align the work of PNY's committees and working groups in service to equity.
- This year, the Large Foundation CEO Network explored topics of risk and dialogue in moments of intense conflict. The group has focused these discussions on the values they are holding and the criteria they are using to make decisions in light of newly perceived risks and in navigating the challenging conversations that arise with staff, board and other stakeholders during consequential current events.

### ***Sharing PNY's own learning journey in ways that help PNY's members to create their own tools, practices, and equity learning paths:***

- We crafted two [CEO Messages](#) focused on the necessary skills, listening and leadership across organizations necessary to navigate equity-centered change.
- We shared [our experience as a staff](#) trying to navigate the fear, vulnerability, and values we are all holding in the wake of the horrific violence we are witnessing in the Middle East and the rise in hate, in particular, Antisemitism and Islamophobia, they have sparked here in New York City.

### ***Building communications strategies that support an invitation to critical thought, mindful practice, learning and reflection on equity in foundations:***

We are building a body of post-program *Insights* pieces that elevate program content and invite members to engage with the learnings from programs – particularly those with an explicit equity focus. These pieces make

the learnings and key takeaways accessible for an expanded audience, even those who were unable to attend the program at the time.

In 2023, these invitations to critical thought and mindful practice included:

- [What Does It Mean to Be Black-Led? - Going Beyond Demographics](#)
- [Beyond the Glass Cliff: Reimagining Executive Transitions in the Sector](#)
- [Purpose as a Compass: Grant Reporting - What is the Purpose? Linking Values, Vision, and Practice](#)
- [The Path to Racial Equity: How Board Readiness Informs Organizational Readiness for Black Board Leadership](#)

***Growing our capacity to influence government actors in service to strengthening the nonprofit sector and expanding the voices that inform public policy:***

As noted above, we ask ourselves regularly what form of leadership is required of PNY, and philanthropy, in order to be stronger allies around the key issues that create the conditions in which our members' investments can thrive. This year, that work included:

- PNY submitted [testimony](#) in support of bills proposed in the city council to improve New York City's contracting processes in a way that would offer more timely processing of City contracts and a bill that would track and seek to implement living wage floors into City contracts.
- PNY and 12 member foundations met with the City Council prior to the budget process to advocate for improved contracting processes and livable wages for nonprofit workers.
- We engaged Deputy Mayor Ana Almanzar in a [wide-ranging conversation](#) about her priorities as New York City's newest Deputy Mayor.
- PNY stood in allyship with the #JustPay Campaign by amplifying [A Day Without Human Services](#). PNY's strategy included issuing a statement to our membership on the day of the strike and using our influence and presence on social media to encourage our member community to support grantees who participated in the strike.
- We have developed the [PNY Policy Corner](#) as a vehicle for shaping narrative voice around big picture policy issues that affect our membership and call for thoughtful reflection and action.

***Committing financial resources to acknowledge the labor of those people of color whose wisdom, lived experience, and skill advance, enhance, and enrich our learning platforms.***

In 2023, PNY developed an honorarium policy that represented a shift in PNY's practice and how we prioritize our financial resources. Our historical policy of not providing any compensation to speakers contributed to patterns of uncompensated knowledge extraction in philanthropy. After more than a year of benchmarking data from our sector colleagues, interviewing previous partners who have spoken at PNY to test assumptions and gather feedback, and working with both the learning and policy teams to surface ways in which the honorarium might be put to the test, we have piloted our first speaker honorarium policy.

***Generate partnerships and build business relationships with consultants, vendors, and companies led by people of color.***

- In 2023, 31% of PNY’s expenditures (excluding personnel and rent) were spent with companies led or owned by people of color.

***Build capacity for caucusing and use it as a tool throughout the org to provide space for work within racial and ethnic groups to increase understanding and actively practice racial equity concepts.***

- This year, we built racial caucusing into our annual racial equity training for committee members and working group members. During the training, we offered the opportunity to break out for discussion in smaller (self-selected) groups based on racial identity. We explained to attendees that we use caucusing as one way to reinforce and tend to parts of the whole that may require intentional care. Caucusing creates a potentially freer space for individuals to be clumsy, iron out language, reconcile difficult experiences, and even rehearse and get feedback on half-baked ideas. This is all in an effort to fortify what’s possible for the larger collective. Attendees reported a positive, more nuanced experience in caucus groups.
- In 2023, we continued explorations around whether there is a role for a caucus for CEOs of color in PNY’s membership. In the Fall of 2022, we engaged Learning Leadership Corp (LLC) to design focus groups for PNY member CEOs who identify as people of color to share their reflections and aspirations as leaders. The consultants listened deeply and offered their take-aways and recommendations based on what surfaced across the two learning conversations. We heard in the process recommendations that folks were keen to shape what might emerge from these exploratory conversations. We shared a set of initial reflections and offered follow-up calls with participants to identify next steps. One of the recommendations was to build more opportunities for white leaders to examine their own role in changing the conditions for their peers. As a result, we are working with Equity in the Center to offer an impactful [training for white CEOs](#) in 2024.

***Identify ways that PNY can support our member community to respond to racial violence and harm.***

We recognize that the constant news cycle and seemingly endless number of consequential events require a set of criteria to support decision making around when, why, and how to respond in our communications to the PNY community. We continue to hone a line of inquiry designed to help us make decisions around when PNY should respond and what PNY can offer in our communications with members.

Currently, we have a rapid response protocol that includes a line of inquiry:

- Did it happen in New York City? – **Geographic Proximity**
  - When tragic events happen in New York City, we have knowledge and relationships locally and a responsibility to take a more active role in organizing the philanthropic sector’s response
  - Disasters in New York State will typically require some sort of response from NYC.
- Is PNY in relationship to people and institutions that are doing work on the potential root cause of the issue? - **Relational/is this something that we have worked on**

- Is what happened in an issue area that we have done or been partner to intentional programing?
- Is this a lightning rod conversation on philanthropic practice that we have a perspective on? Is it a perspective that would lead to us amplifying our individual voice? – **Philanthropic Practice**
- Is the proper response a communication to members? What other levers might we explore to be in conversation with members? – **PNY's tools**
- What action is required of the philanthropic community? What resources can we offer?
- What role should we play in this situation?
  - Our role in these situations is often as a resource to our members. We often can serve as a curator and trusted source of content (connecting members to resources and thought leadership external to PNY) given our relationship with and position in the sector.
  - We can help members connect the dots between the tragic event and the philanthropic practices that are necessary and critical to work against these types of events using our communications to influence practice change.
  - While we avoid blanket 'stand in solidarity' statements, our acknowledgement (we see what's happening in the world, the power of bearing witness) is important.

The protocol is very much a work in progress and has been guiding responses such as the one that we wrote on the murder of Jordan Neeley, earlier this year.

### **Conclusion:**

In 2023, PNY hosted over 100 gatherings for 15+ networks and working groups. We reprised our most valued [PNY Core programs](#) and hosted a series of conversations that helped members put [Possibility into Practice](#). We generated impactful communications and engaged in allied advocacy across the sector. We renewed almost 280 memberships, kept meticulous financial records, and examined our cybersecurity risk. But, none of that was as impactful as the frequent, consistent, equitable choices we made on a daily basis to re-imagine the internal and external ways that we work with this membership to shift our ecosystem in service to a more equitable and sustainable culture and practice.

Transformational work requires deep equity-centered change management, both within our organization and in our relationships with members and sector partners, to unlearn old ways of working and build new patterns and agreements. I hope that this report gives you a sense for the nuanced and often invisible work of restructuring our institution and institutional relationships to engage the sector's power and privilege to dismantle inequitable systems.