

## **STRATEGIC PLAN—2014 - 2016**

**VISION:** Philanthropy New York, through its leadership, serves as a connector of people, institutions, ideas, and resources, as well as a catalyst for advocacy and action for change. Through the work of Philanthropy New York, our members are more effective than they would be if we did not exist. Specifically, philanthropic organizations in the New York region:

- Are engaged and energized in providing leadership and resources to ensure intentional, long-term change;
- Have the knowledge and skills they need to advance their missions effectively;
- Share, adopt and use effective, efficient, and accountable grantmaking practices;
- Work collaboratively to improve the lives of people in their communities and throughout the world;
- Provide leadership regionally, nationally, and internationally on issues affecting the philanthropic sector;
- Share their work with the public, media, opinion leaders, and policymakers while underscoring the value of philanthropy and the accomplishments of their grantees.

**MISSION:** Philanthropy New York enhances and increases the ability of organizational and individual philanthropists located in the New York region, whose missions focus on New York, the United States, and around the globe, to serve the public good.

To this end, Philanthropy New York:

- Supports meaningful collaboration and knowledge-sharing among funders and their grantee organizations;
- Promotes effective, strategic philanthropy through programs, services, and resources;
- Connects foundation leaders with key policymakers ;
- Informs and advances public policies that support effective philanthropy and a productive nonprofit sector;
- Fosters effective communications about the value of philanthropy and the philanthropic sector to the larger community; and
- Develops a diverse and capable group of future philanthropic leaders.

**CORE VALUES:** In pursuing its mission, Philanthropy New York is guided by five core values that drive the organization toward the future it seeks to create for its members and the broader community:

- Integrity: We are committed to honesty and scrupulous adherence to the highest professional, moral, and ethical standards;
- Impact: We believe that philanthropic efforts should support and enhance meaningful work that serves the public good in ways that, whenever possible, are measurable and sustainable;
- Inclusion: We value the full participation of communities and individuals and embrace the many forms of diversity, including, but not limited to, ethnic, cultural, racial, religious, sexual orientation, economic status, physical ability, and gender as we draw from the perspectives, opinions, and experiences of a broad cross-section of people. We consider this participation essential for the best quality work as well as for a fair and just society;

- **Transparency and Accountability:** We hold ourselves to the highest standards of organizational integrity and responsible stewardship, which require open, broad, and thorough disclosure of decisions, processes, and procedures; and
- **Collaboration and Partnership:** We embrace sharing knowledge and taking collective action to strengthen all parties and effectively leverage resources to achieve common objectives and amplify desired impact, even as each party retains the independence to act individually.

## **INTRODUCTION AND CONTEXT FOR THE 2014-2016 PLAN**

This plan lays out the vision and goals that Philanthropy New York will pursue for the three-year period of 2014 through 2016. The ambitious work we envision for the next three years builds on the successful accomplishments over the last three years, based on our current strategic plan. Those successes are a direct result of the strong and vibrant partnership between Philanthropy New York and our members.

Philanthropy New York’s current 2011-13 strategic plan was drafted in 2010. The terrain for the “Third Sector”—indeed for the country as a whole—was harsh. Nonprofits and foundations large and small had reduced staff and cut back on new grants or programs – or eliminated them entirely. A number of well-known nonprofit organizations had collapsed. Talk centered on the “new normal,” in which the charitable sector would need to do more with less – much less government spending compounded by fewer dollars from many in the foundation sector as well.

These last three years have indeed been challenging, yet in that challenge, Philanthropy New York, through our members, deepened our practice and broadened our engagement with other sectors. These three years have also seen our sector become more focused on how to ensure that philanthropic resources were used to achieve the most impact for mission. These two shifts have led many in the Philanthropy New York community to explore and engage in collaborative activities. Similarly, there was renewed attention on the partnerships and intersection between policy makers and foundations.

With this backdrop, Philanthropy New York has, over the last three years:

### **I. Continued to build engagement and knowledge among our members in multiple ways, including:**

- a) We piloted Essential Skills and Strategies, a cohort-based, multi-day professional development seminar for new foundation program staff, in partnership with other regional associations.
- b) We expanded the number, complexity, and visibility of our programming. And our monthly documentary series, presented in partnership with Ford Foundation’s Just Films, drew hundreds of participants together to understand the power of filmed storytelling.
- c) We strengthened the structure of our peer networks at all levels of professional responsibility. Our CEO roundtables, our peer-mentoring Young Leaders Breakfast Club, and other similar networks grew as our members recognized the high quality of Philanthropy New York’s professional development programs and resources.

### **II. Supported both collaborative activities and policy related connections to our membership, including:**

- a) We created and provided ongoing support for several substantive based “working groups” that have come together around an issue and how to best engage with policy makers (Education, Health, Women and Girls).

- b) We brought together on one stage high-visibility representatives from the federal, state, and local NYC governments to talk candidly and in partnership with funders about education reform (2012 Annual Meeting) and Hurricane Sandy recovery (2013 Annual Meeting).
- c) We spearheaded an ambitious funder collaborative—the Education Funders Research Initiative—that sponsored research and meetings that analyzed a decade of school reform and developed a set of priorities that the next administration in the city should consider.

These activities, and much more, reflect the strength of our membership and the commitment of our Philanthropy New York and our Board to providing leadership and supporting for the philanthropic community.

### **OUR STRATEGIC PLAN FOR 2014-16**

Philanthropy New York's leadership and supportive roles during the last three years sets the stage for the next phase. The “new normal” continues to evolve, and Philanthropy New York is positioned to play a central role in advancing our sector’s leadership. As a “level playing field” at which funders and others can gather, we provide the platform for convening multi-foundation and multi-sector conversations and collaborations. Our own relationships and those of our members mean we can engage and involve in those convenings the mix of parties from NGOs, all levels of government, and business. Philanthropy New York can also contribute our well-honed knowledge of crafting programs and gatherings that maximize honest, meaningful, and impactful exchange. As the principal source of comprehensive professional development for our sector, we ensure that our members bring to the table the most current knowledge and critical professional skills.

### **GOALS FOR 2014-16**

#### **Strategic Member Engagement:**

Philanthropy New York is committed to deepening the value of membership. We will enhance opportunities for our members to obtain the knowledge they need to meet efficiently and effectively their missions and collectively build capacity for the field. Philanthropy New York will partner with foundation executives, staff and trustees, in creating, convening and supporting meaningful collaboration and knowledge exchange, both within philanthropy and between philanthropy and other sectors. PNY will continue to be a key and vital source for high-quality professional education for its members and will serve as both a physical and virtual “hub” for supporting the foundation community’s critical work of improving the common good.

#### **STRATEGIES:**

- Philanthropy New York will expand its offerings of programs that provide a "deeper dive" or "conference format." including more program formats and content that appeal to foundation executives and trustees, both as audience and participant/presenter.
- Philanthropy New York will strengthen and augment its offerings of programs designed to provide training and a deeper understanding of philanthropy, grants management, program areas and best business practices for colleagues at all points in their careers, and in all areas of professional responsibility across foundations.
- Philanthropy New York's programs, other services and resources will be used strategically and tactically to support these goals and will be evaluated periodically to demonstrate the impact we provide.

- Philanthropy New York will remain committed to representing a broad range of philanthropic organizations and viewpoints within the community, while exploring viable ways to provide services or resources of value to appropriate non-member organizations.

**Informative Public Policy:**

Philanthropy New York will increase the frequency, quality and depth of connections between the philanthropic sector and leaders in government, business, nonprofits, academia and media to shape more accurate perceptions of the role of philanthropy – both the strengths and the limitations of the sector. Philanthropy New York’s focus will be about creating meaningful opportunities for members to engage in and learn more about public policy work that enhances members’ charitable mission.

**STRATEGIES:**

- PNY will function as a conduit for the philanthropic sector to influence how public policy gets discussed and implemented.
- We will also serve as a conduit of timely information about issues affecting the philanthropic sector; we will provide numerous ways—virtual and face-to-face—for members to discuss and debate these issues.
- PNY will proactively convene members and leaders from the public policy and other sectors to foster the exchange of knowledge on issues that our members fund and in which they have strong expertise and provide important leadership.

**Institutional Sustainability:**

In order to further leverage the leadership and expertise provided to the field and our region, PNY will seek to capitalize on new business opportunities to increase member value and generate additional revenues. The Board will help PNY develop and prioritize these opportunities by considering each in light of the organization’s capacity and each respective opportunity’s alignment with PNY’s mission. The first strategies recommended are:

**STRATEGIES:**

- Over the period of this plan, Philanthropy New York will work to maintain a 90+% renewal rate, and to increase the representation in its membership of staffed foundations with substantial grantmaking.
- The Board will secure and support Philanthropy New York’s move to new office and meeting space by mid- 2015, when our current lease will expire. A key priority here is finding physical space that can meet PNY’s greatly expanded capacity to serve as a convening hub for foundations, policymakers, and nonprofit leaders.
- Philanthropy New York will investigate and, as appropriate, develop fee-based business lines through which member and non-member organizations can draw on our staff’s fiscal, governance, and facilitation expertise to support our members’ activities and projects.
- In order to implement this ambitious plan, the Board will support and work with the President to ensure the staffing needed to solidify Philanthropy New York's leadership position.