

The background of the cover is an abstract, textured composition. It features a large, dark blue circle in the center, which is surrounded by a lighter blue ring. The entire design is set against a background of vibrant, splattered colors including orange, yellow, red, and blue, creating a dynamic and artistic feel.

STRATEGIC FRAMEWORK

2022-2027



philanthropy
new york

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INTRODUCTION

New York's philanthropic sector holds significance. For decades, members of the Philanthropy New York (PNY) community have been a driving force and a model for resourcing and championing meaningful social change. With considerable visibility, influence, and over \$7 billion in annual giving, PNY member institutions take the trust placed in philanthropy seriously and strive to live up to the highest values of doing good and using our power to achieve a more equitable, sustainable, and democratic society.

However, despite the philanthropic sector's focus on effectiveness and impact, we continue to bear witness to inequities that stubbornly persist. The collective reckoning with racial inequity that has gripped our nation has led many in the philanthropic sector to examine how our systems and practices have both deliberately and inadvertently upheld and perpetuated a racially inequitable society. The sector is asking:

- *How have our professionalized grantmaking practices assumed neutrality or objectivity, thus missing an opportunity to address underlying inequitable systems?*
- *How have our governance practices focused on the preservation and accumulation of endowments rather than complex conversations about the institution's purpose?*
- *In what ways have we prioritized building trust and accountability with the most powerful within our ecosystem at the expense of building trust and power with communities most impacted by injustice?*

As a philanthropic community we must recognize the urgent opportunity we have to examine our assumptions and re-imagine a new way of working to build a better society for all.

The following Strategic Framework is our guide.

This framework articulates our belief in a more just and equitable sector characterized by a “power with” approach — one in which philanthropic organizations build power with communities and grantees. We envision a philanthropic sector that ensures those who most



experience inequity inform and lead strategy design and have the capacity to implement and advocate for solutions. For philanthropy to earn the trust of our stakeholders, we believe we need to name, negotiate, and change the power imbalances that define philanthropy's work and the power imbalances that characterize the issues philanthropy cares about.

To develop this Strategic Framework, Philanthropy New York engaged in a 16-month process with staff, board, members, and sector partners to reckon with our purpose. We reflected on our vision, values, and role in the sector, and we are defining the intentional next steps needed to deepen the equity work we started many years ago. What has resulted is a commitment to restructure our institution and institutional relationships to become an anti-racist organization.

With this Strategic Framework, we invite you into a space of learning and action.

We will embark on a journey to become an anti-racist organization while accompanying our members in their equity journeys, wherever they find themselves in this work. We commit to providing the support and community that allows you to spot and actively challenge the racism embedded in our structures, policies, and systems. Together, we can advance more inclusive practices that re-center those who have been historically marginalized and dehumanized.

As a community, we have an opportunity to re-imagine a philanthropic ecosystem characterized by trust, relationship, and accountability to the society we want to be. It will take our collective curiosity, imagination, and reflection to live up to our highest values of doing good. How will you catalyze a philanthropy committed to a more equitable, sustainable, and democratic society? Join us in re-imagining ways we can live into the true meaning of the word philanthropy — ***“a love of humankind.”***



How Did We Get Here?

CONTEXT FOR THIS STRATEGIC FRAMEWORK

Background and history

Philanthropy New York is a membership association made up of more than 280 philanthropic institutions with 5000+ engaged community members serving in a range of roles within those institutions. Our work seeks to be both responsive to this community and to anticipate the learning and connections members need to responsibly steward the funds entrusted to their care. To that end, Philanthropy New York's last Strategic Plan (2017–2021) aspired to help the philanthropic field imagine new ways of working that confronted the historical context of philanthropy and the practices and policies that perpetuate systemic inequity in the U.S. Our last Strategic Plan contained a discussion of the context in which PNY was working in 2016, using language as accurate today as it was then:

... the country as a whole is confronting our history of systemic inequity. As a result of these trends, it is critically important that Philanthropy New York, as a regional association of grant makers, redouble our focus on the development of the individual, institutional, and collaborative leadership necessary to create meaningful societal change.

(From PNY's 2017-2021 Strategic Plan)

From 2016 to present, Philanthropy New York has committed to building intentional frameworks to shift *our own culture* and that of *our ecosystem* in service to equity, and more specifically, racial equity. PNY staff and Board have sought to operationalize this commitment and put it into action. This work has included extensive staff and Board learning and development, as well as changes to our organizational policies and operating practices in human resources, finance, communications, programming, governance, and public policy work. Externally, we have crafted learning opportunities and network discussions, and engaged in one-on-one support with members as they build their understanding and capacity to engage in racial equity work.



In 2018, the Philanthropy New York Board reflected on the urgency of adopting a racial equity lens across all of our work. The Board observed:

Prioritizing racial equity is an opportunity to rally philanthropy around a fundamental issue core to societal sustainability; and

If PNY and the sector do not embrace racial equity as a core value, we are essentially supporting institutional racism.

Over the past five years, as we grappled with our organization's racial equity work, the Promising Practices Task Force of the Board recognized that all practice shifts, including our own, had to be rooted in values. After an inclusive year-long process, the organization adopted a set of values at the beginning of 2020: [community, learning, equity, and leadership](#).

Our Values

community

PNY fosters an interdependent **community** that respects diverse voices, contributions and participation.

We are a community that learns from each other and actively contributes to one another's learning.

We believe that our missions are best achieved by leveraging our collective strengths.

equity

PNY embeds **equity** in all of our work. We acknowledge that institutional philanthropy stems from systems rooted in inequity.

We have both the opportunity and responsibility to engage the sector's power and privilege to dismantle these systems.

learning

PNY embraces **learning** as an exploration of different perspectives, inclusive of a full range of expertise and experience.

We test assumptions and challenge the sector's conventional wisdom in order to adapt and evolve practice over time.

leadership

PNY believes philanthropic **leadership** is nurtured through community and in relationship with others.

We break down barriers and provide pathways for individual members, member institutions, and PNY to exercise influence and become agents of change.



Building on progress: a new Strategic Framework

Building on the last five years of work at Philanthropy New York, and with the urging and input of our members, we now seek to align our organizational work, and our leadership within the ecosystem¹, with our values.

This five-year Strategic Framework relies on Philanthropy New York's value of *leadership*: ensuring our actions in community and in relationship with others build agency for a more equitable sector. This idea is articulated in the article, "Beyond Low-Hanging Fruit: Shifting Power, Changing Systems, and Organizing in Our Own Sector" by Farhad Ebrahimi, Founder and President of the Chorus Foundation:

...we use the word "organizing" to describe a process of developing both leadership and relationships to shift power for structural change. The goal of funder organizing, then, is to do much more than simply move the money; it's to shift structures—and cultures!—within philanthropy itself. And we believe it's critical that we do this in a way that's both informed by and accountable to the transformative organizing efforts already happening at the community level.¹¹

Philanthropy New York is committed to this journey and to accompanying our member community in their journeys wherever they find themselves in the work of building an equitable, democratic and sustainable society.

¹ Philanthropy New York exists within an ecosystem that includes philanthropic organizations that are members of the PNY community; philanthropic organizations in the New York City metro area that are not members but are involved in the broader community; the people and entities that our members support; other philanthropy organizations that engage with funders; and institutions and policymakers serving the region.



WHAT WE KNOW:

Grounding Analysis for This Strategic Framework

Systems of injustice shape our sector

At Philanthropy New York, we know that a critical understanding of how structural racism shapes our institutions and systems helps us co-create a roadmap with members and others in our ecosystem for moving forward together. In our values statement, programming, communities of practice, and policy work, Philanthropy New York acknowledges that historically and in the present, institutional philanthropy in the U.S. stems from systems rooted in inequity. We understand that capitalism and racism are co-joined in the colonization and creation of the modern United States. We recognize that the capitalist structures that allowed for modern institutional philanthropy to flourish were dependent upon slavery, violence, imperialism, and genocide. More recently, racialized capitalism and policymaking provided the foundation and continuing support for the centralization of wealth within white communities.² The resulting structures ensure and perpetuate the individual and institutional creation, maintenance, transfer, and protection of substantial power and wealth. “Philanthropy is commendable,” Dr. Martin Luther King Jr. wrote, “but it must not cause the philanthropist to overlook the circumstances of economic injustice which make philanthropy necessary.” We acknowledge and are informed by the scholarship and activism of our members^{3,4}, academics⁵, nonprofit practitioners⁶, activists, community members, and civil society all of whom have urged us to reckon with this history and change our practices to achieve more equitable outcomes.

“Philanthropy is commendable, but it must not cause the philanthropist to overlook the circumstances of economic injustice which make philanthropy necessary.”

DR. MARTIN LUTHER KING JR.



Questioning the status quo leads to more effective and impactful solutions

Philanthropy New York's value of *learning* is an invitation to test assumptions and challenge conventional wisdom in order to evolve practice over time. At PNY, we believe that aligning institutional philanthropic practices with the value of *equity* requires having honest, courageous conversations about structural racism and white dominant culture. Naming difficult truths about our shared history, policy, and institutional bias informs funding strategies that address the root causes of racial inequity. The result of that acknowledgment and the work that foundation professionals do to dismantle these structures, leads to the development of tools and strategies better designed to tackle inequity. In order to align philanthropic investments and leadership, practitioners Gita Gulati-Partee and Maggie Potapchuk assert that foundations must also name the ways that the *culture within our institutions* is shaped by, centers, and over-privileges whiteness.

For foundations to work toward racial equity through their philanthropic investments and leadership, they must shine a light on white privilege and white culture both internally and externally. This means engaging in dialogue, reflection, and action on racial equity, not only to target their grantmaking and leadership activities to effect equity in the fields they fund, but also to examine and change their staffing, operations, and organizational culture to more closely align with their equity goals and values.⁷

Interrogating the impact of racism both internally and externally ensures that grantmaking strategies consider and address the ways that institutional structures and policies shape outcomes.⁸





STRATEGIC FRAMEWORK

Our Vision: What We Believe is Possible

Our Strengths: Assets We Will Bring

Our Commitments: What We Will Do



STRATEGIC FRAMEWORK

OUR VISION:

What We
Believe is Possible

We can imagine a new way forward

In March 2020, Philanthropy New York embraced a value of *equity* and articulated that we have both the opportunity and responsibility to engage the sector's power and privilege to dismantle inequitable systems. We now find ourselves in a moment when there is a collective acknowledgement of racial inequity among many in the philanthropic sector and an expressed commitment to support positive change. We can meet that moment by working together to imagine something that is much more closely aligned with the meaning of the word *philanthropy*: **"a love of humankind."**

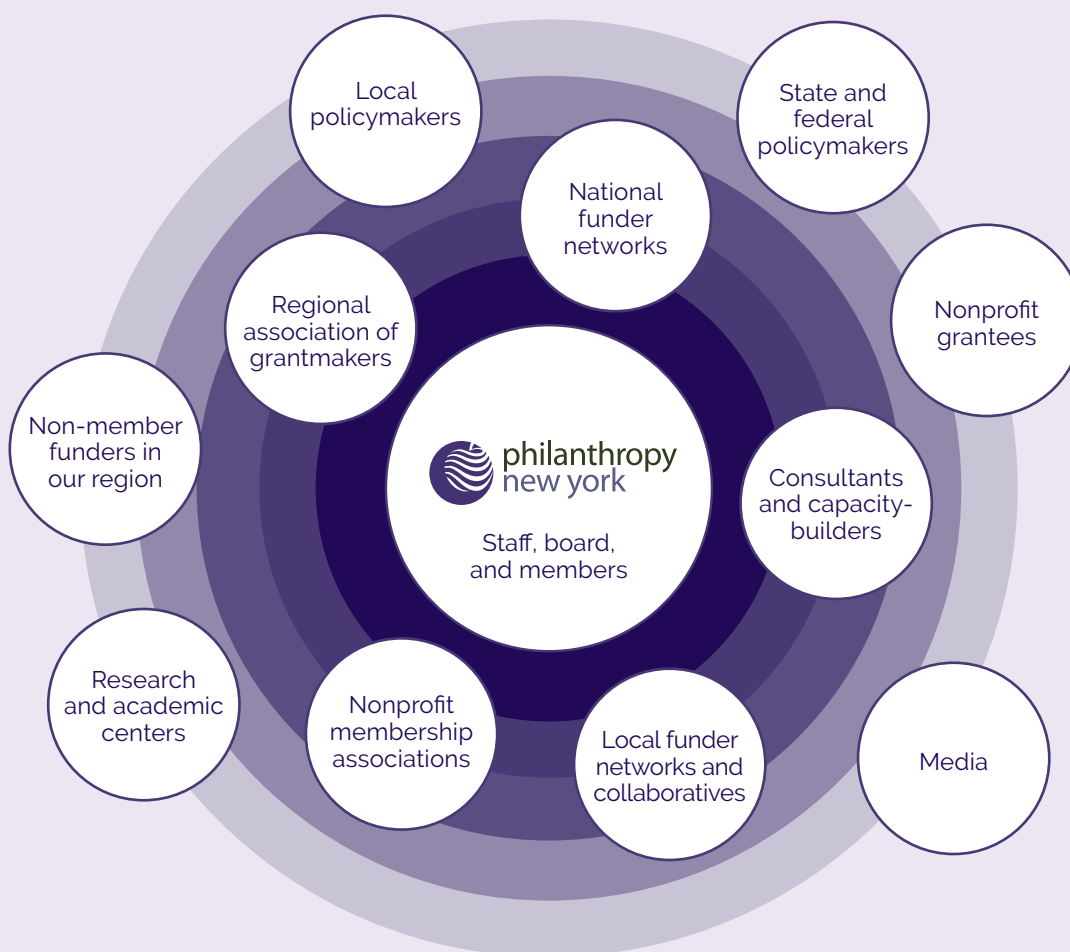
Philanthropy New York strives to catalyze and support **a more just and equitable philanthropic ecosystem** in which many forms of power are recognized, shared, and built with those who are most harmed by racialized policies and practices.



EXPLAINING OUR VISION

What is the philanthropic ecosystem in which we work?

As a regional association of grantmakers, Philanthropy New York exists within a rich ecosystem of partners. This ecosystem includes philanthropic organizations that are members of the PNY community, philanthropic organizations in the New York City metro area that are not members but involved in the broader community, the people and nonprofits that our members support, philanthropic networks that engage with institutional funders, and institutions and policymakers serving the region. Our work is shaped and informed by these relationships, and conversely, our members' work shapes and informs the work of that ecosystem.



Opportunities abound for aligning work, supporting and amplifying calls for systems change, and developing new relationships to ensure the organization is accountable to more equitable ways of working. **We seek to align our work with a network of institutions dedicated to the vision and practice of a more equitable and sustainable nonprofit and philanthropic field and to the redistribution of the wealth and power extracted from marginalized communities.**

What forms of power does our sector hold?

Power, or the capacity to produce change, exists in many forms within this ecosystem. The pioneering management theorist, Mary Parker Follett, posited that “power is not a pre-existing thing which can be handed out to someone, or wrenched from someone.”⁹ She stressed the importance of ‘power with’ as opposed to ‘power over’ in producing positive change.

Power characterizes all aspects of our sector. In the relationship between grantees and foundations, grantmaking is often seen as the key way that foundations exercise influence. Funders use their resources and influence to elevate institutional priorities, fund specific strategies and fields, identify and select grantees, structure grants and awards, and mandate evaluation and reporting requirements.

All of these actions present opportunities for power to be exercised unilaterally or shared and built with others.¹⁰ In addition to grantmaking, asset management and investment, vendor procurement and contracting, leadership and board appointments, and employee outreach and hiring provide opportunities to leverage organizational policy and procedure to make an anti-racist impact. Finally, within the greater nonprofit and philanthropic ecosystem, power is exercised in the value we place on different forms of knowledge and expertise, proximity to established and formal power structures (e.g., government), and the ability to shape and amplify narratives.

“Power is not a pre-existing thing which can be handed out to someone, or wrenched from someone.”

MARY PARKER FOLLETT

What does shifting and sharing power look like?

Farhad Ebrahimi helpfully points to a number of ways that foundations are already seeking to address power imbalances in the funder-grantee relationship, “from building trusting relationships with grantees; to making long-term, unrestricted commitments; to co-designing tactics, strategies, and processes with grantees; to building processes and structures for democratized decision-making; to spending down endowments; and, finally, to supporting the creation of alternative infrastructure for resource allocation and investment.”¹¹ The following case studies are just a few examples that illustrate how funders are exercising their power differently and communities are creating new standards around the ways that lived experiences should shape and determine resource allocation.



CASE STUDIES

Examples of philanthropic entities working to shift power in their practices and support equitable approaches are abundant:

- Sabbatical programs like those funded by the [Durfee Foundation](#) invest in leadership growth and strengthen field development by supporting the need for rest and recovery.
- Participatory grantmaking models abound. The [Red Umbrella Fund](#) enables those that are directly impacted by and fighting against state violence and criminalization to set priorities and direct resources. In Baltimore, local activists shaped a participatory grantmaking model for the City's \$12 million [Children and Youth Fund](#), ensuring that small, Black-led grassroots groups led the decision-making process.
- [Thousand Currents](#) established The Academy: Solidarity as Practice to work “with donors and impact investors to adopt transformative practices that can dismantle injustice and inequity.”
- Equitable evaluation efforts like those of the [Kresge Foundation](#) and the [Colorado Health Foundation](#) are naming the orthodoxies inherent in evaluation paradigms, asking practitioners to question how they decide what information sources they trust and crafting new ways of interacting with partners and the community in their evaluation efforts.

EXPLAINING OUR VISION

What is possible if we shift and share power?

Philanthropy New York envisions relationships characterized by the accountable use of power. We recognize that in shifting and building power for transformative change, we have the opportunity to create an ecosystem characterized by trust and relationship, one in which we actualize multiple forms of power and shift away from an overreliance on the power of money. Janet Surrey endorses the idea that “power in the ‘power-over’ model is always unsafe. It’s never enough and [it’s] always being challenged.”¹² A power ‘with’ model is abundant.

Philanthropy New York joins our colleagues in the field in envisioning a sector characterized by a “power with” approach—one in which foundations build power with communities and grantees, ensuring those with the proximity to inequity and oppression inform and lead strategy design and have the capacity and strength to implement or advocate for solutions. We envision a sector in which funders are co-creating a new power, which is vested in relationships characterized not only by the trust of one’s grantees but also of the individuals who are most disadvantaged and marginalized.





STRATEGIC FRAMEWORK

OUR STRENGTHS:

The Assets We Will
Bring to Make This
Vision Possible

An engaged learning community

As a regional association of grantmakers, Philanthropy New York brings to this work a powerful set of core assets. Among our membership, these assets include relationships, finely tuned learning strategies, and trusted communities of practice.

In 2021, Philanthropy New York surveyed members in partnership with the Center for Effective Philanthropy. The survey highlighted key strengths around PNY's learning strategies and communities of practice:

- Eighty percent of members report that they have made at least one change in the way they do their own work, and at least 70% indicate that they have proposed a change in their foundation's work, implemented a best practice into their work, and explored questions that they had not previously thought to ask.
- When asked to describe the impact that PNY has had on their practices and culture, the top two categories were the knowledge and best practices provided by PNY and the opportunities for networking, peer learning and peer collaborations.
- Survey respondents report that PNY's networks and working groups are the paramount benefit that members receive from being a part of PNY.

80%

**of members report
that they have made
at least one change
in the way they do
their own work.**

Philanthropy New York programs, networks, and working groups spark questions that members had not previously thought to ask and produce changes in philanthropic practice. Therefore, PNY is critically positioned to play a more active role in moving philanthropic practice—individual and institutional—in an anti-racist, equitable direction.

Partnerships and visibility

Interviews with partner philanthropic networks and focus groups with Philanthropy New York members identified another set of assets that support broader ecosystem engagement.

These include **growing relationships with partner organizations, the unique visibility of our region, and the referred power of our member base.**

- Interviews confirmed that colleague organizations, whose rich expertise has shaped critical analysis and advanced equitable practice within the field, are willing to collaborate and consent to allyship with Philanthropy New York. Partners have indicated a desire to co-create curriculum, align effective communications and narrative work, and build engaging spaces to support practice for those interested in engaging in equity work. PNY members, partners, Board, and staff have also identified relationship building with nonprofits and those closest to the frontlines of social justice movements as an area of key growth for the organization.
- Member focus groups and partner interviews identified the unique visibility and weight of Philanthropy New York's membership, some of the largest and longest practicing philanthropic institutions in the nation. As one partner noted, "New York is where trends are set. That's a responsibility. We will look to you because of where you are. We put our expectations in you to help us."
- More recently, members have invested substantial support in leveraging Philanthropy New York's member base and decade of policy experience to build our capacity to organize and collaborate around the public policy issues that underpin our members' work. PNY's issue-based working groups already provide a platform for critical conversations and coordinated action around key policy issues. And, our membership has expressed the desire to engage more deeply with both the local and federal government.

"New York is where trends are set. That's a responsibility. We will look to you because of where you are. We put our expectations in you to help us."

PNY PARTNER





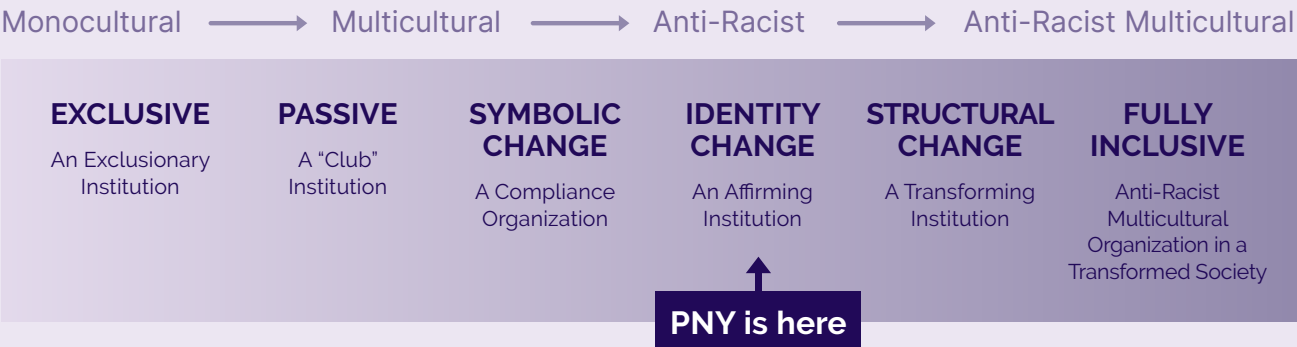
STRATEGIC FRAMEWORK

OUR
COMMITMENTS:
What We Will Do

Commit to restructuring how we work

Philanthropy New York is committed to becoming an anti-racist organization—one that makes a conscious decision to make frequent, consistent, equitable choices daily—and engaging the sector’s power and privilege to dismantle inequitable systems. We recognize that this is dynamic work that exists along a continuum. In the next five years, we will focus on restructuring our institution and institutional relationships to support this goal, including inviting our members to join us on this journey. Guided by the organizational thinking that is characterized in the [Crossroads Ministry’s Anti-Racist Continuum](#), this reimagining will include a number of internal and external shifts in the way Philanthropy New York works.

Continuum on Becoming an Anti-Racist Multicultural Organization



This Strategic Framework is designed to help Philanthropy New York engage in a dynamic transformation process. Moving along this continuum towards Structural Change requires that PNY:

- ➔ Commit to a process of intentional institutional restructuring, based on anti-racist analysis and identity
- ➔ Audit and restructure institutional life to ensure full participation of Black, Indigenous, and people of color
- ➔ Implement structures, policies, and practices with inclusive decision-making and power
- ➔ Work to dismantle racism in wider community
- ➔ Institutionalize anti-racist multicultural diversity as an asset
- ➔ Rebuild relationships and activities based on anti-racist commitments

Transformational work requires change management both within our institution and in our relationships with members and sector partners. We undertake this work understanding that it will evolve as we try, fail, learn, and adapt. We know that it will require acquiring new knowledge and unlearning old ways of working. We seek to be guided by the wisdom of those whose knowledge, expertise, and lived experience have not been centered in the past. We are actively learning from those whose work has helped to pave a path, and we will look to the examples they have set and focus our attention on key areas of practice.

Continuum on Becoming an Anti-Racist Multicultural Organization
© Crossroads Ministry, Chicago, IL: Adapted from original concept by Bailey Jackson and Rita Hardiman,
and further developed by Andrea Avazian and Ronice Branding; further adapted by Melia LaCour, PSED.
https://philanos.org/resources/Documents/Conference%202020/Pre-Read%20PDFs/Continuum_AntiRacist.pdf



OUR COMMITMENTS

Becoming an anti-racist organization

In order to embark on this work, Philanthropy New York will reorganize our organization and urge our community to adopt more equitable ways of working. We must restructure the ways we work and types of support we provide to be aligned with this goal and our values. With our values as the lens, we are committing to a different way of working both *internally* as an organization and *externally* in partnership with our members:

Guided by our value of **Learning**:

Internally as an organization, we will:

- Create internal accountability mechanisms and practices that consistently examine our own practices as a staff/board across the range of institutional activities.
- Cultivate a learning culture that invites different ways of knowing and embraces a wide range of expertise and experience.
- Build competency around racial equity facilitation and conflict mediation across the organization.
- Commit and track financial resources devoted to deepening racial equity learning, healing, and restorative practices, accountability reporting, and shared leadership growth.

Our members can expect us to:

- Ensure anti-racist principles and lines of inquiry are present in all Philanthropy New York programs, cohorts, and curricula.
- Design learning spaces that name, identify, interrogate, and reimagine power structures.
- Navigate the discomfort that arises as a condition of learning and mitigate racialized harm.



- Expand programs that address how power is structured and leveraged in philanthropy. This includes increased programming with boards and trustees that encourages them to learn from one another and better equips them to leverage their role to advance equity.
- Inform the framing of our activities with the voices and feedback of nonprofit leaders outside of the philanthropic sector who are imagining new ways of practicing the principles of philanthropy.
- Share PNY's learning journey in ways that help PNY's members to create their own tools, practices, and equity learning paths.
- Commit financial resources to acknowledge the labor of those people of color whose wisdom, lived experience, and skill advance, enhance, and enrich our learning platforms.

Guided by our value of **Community**:

Internally as an organization, we will:

- Hone an explicit commitment to racial equity within the philanthropic sector in Philanthropy New York's external communications.
- Build communications strategies that support an invitation to critical thought, mindful practice, learning, and reflection on equity in foundations.
- Ensure that PNY's leadership is comprised of racially diverse professionals whose lived and learned analysis of racial equity inform organizational decisions.
- Build intentional relationships with movement leaders who can inform when and how PNY engages in critical issues and provide feedback to shape our allyship within the ecosystem.

Our members can expect us to:

- Identify ways that Philanthropy New York can support our member community to respond to racial violence and harm.
- Support the leadership of PNY's networks and working groups to facilitate conversations characterized by anti-racist principles and practices.



- Build capacity for caucusing and use it as a tool throughout the organization to provide space for work within racial and ethnic groups to increase understanding and actively practice racial equity concepts.
- Utilize and invest our financial resources with professionals of color and Black-led institutions.
- Generate partnerships and build business relationships with consultants, vendors, and companies led by people of color.

Guided by our value of **Leadership**:

Internally as an organization, we will:

- Develop the skills and practices of senior Philanthropy New York leadership to understand and interrogate race-based power differentials and seek to ameliorate them.
- Translate and uphold PNY's values in Board strategy, committee work, and oversight roles. The Board will annually set and track equity commitments.
- Build the skills and capacity of Board members to become ambassadors for PNY's values within their foundations and shape a board evaluation that aligns leadership for this work with board performance.
- Analyze pay equity of the PNY staff by race and gender.
- Annually set and assess internal racial equity goals in PNY workplans and align performance outcomes with our commitments to equity and shared leadership.

Our members can expect us to:

- Apply an intentional anti-racist equity lens to all policy decisions.
- Grow our capacity to influence government actors in service to strengthening the nonprofit sector and expanding the voices that inform public policy.
- Craft leadership programs designed to interrogate and negotiate multiple forms of power (institutional, positional, racialized, gendered, etc).
- Ensure that anyone exercising leadership within Philanthropy New York's community structures is prepared to commit to equity in those spaces.



ACCOUNTABILITY TO THIS VISION

Philanthropy New York seeks to be accountable to the internal and external commitments to become an anti-racist organization outlined in this Strategic Framework. We believe that accountability is comprised of several key elements and collective agreements. We outline those elements here to create a shared definition of accountability across our organization and with our members and sector partners.

Defining accountability

Accountability is not only a practice of acknowledging mistakes, but one of repairing harm and committing to act differently in the future. The journey to accountability is embedded in each of Philanthropy New York's values. As Piper Anderson, writer, equity strategist, and founder of Create Forward, explains, *"Accountability...requires communication, negotiation of needs, the opportunity to repair harm¹³, and the chance to prove that we can change and be worthy of trust again."*¹⁴ This practice is required on multiple levels. Not only must PNY, as an institution, be accountable to the shifts outlined in this document, but accountability must exist within each of us individually and mutually within our collectives and groups.

In addition, we recognize that accountability requires:

- **Relationships** built on trust and consent.
- **Transparency**, visibility, and urgency in examining both processes and outcomes. "To be accountable, one must be visible, with a transparent agenda and process. Invisibility defies examination; it is, in fact, employed in order to avoid detection and examination."¹⁵
- **Action** in the face of discomfort. "Organizations with a culture of accountability understand the

**"Accountability...
requires communication,
negotiation of needs, the
opportunity to repair harm¹³,
and the chance to prove
that we can change and be
worthy of trust again."**

PIPER ANDERSON

¹³ Piper Anderson defines harm as microaggressions, acts of interpersonal racism and institutional policies that perpetuate unequal access to opportunities for people of color.



difference between generative conflict, harm, and abuse...Conflict—not harm or abuse—is a natural and necessary part of all relationships, including our professional ones.”¹⁶

- **An orientation away from punishment** and toward acknowledgement, repair, and relationship.
- **Commitments of financial resources** and the time and energy of staff and board.

Revisiting to whom we are accountable

As detailed above, accountability requires relationships built on trust and consent. As a membership association, Philanthropy New York’s key stakeholders, and our deepest relationships, exist with our members. On a daily basis, PNY is accountable to its membership in our programming, our network building, and our policy work. We invite feedback in our communications, ask for comment on public policy statements, evaluate our programming to better address member needs, and create tools that allow our membership to contact us and share their experience in our community. In addition, PNY’s staff is accountable to the PNY Board and board committees.

This Strategic Framework outlines a *specific shift* in our ongoing work to achieve a more equitable, sustainable, and democratic society; one that aligns with and embodies our value of equity. Restructuring our institution and institutional relationships to become an anti-racist organization requires centering the feedback and concerns of those who are best able to identify the ways that racial inequity and power imbalance manifest in our sector. As anti-racist writer Tim Wise explains:

Accountability, in an antiracist context, means engaging in “the work” in a way that is responsive to the needs and concerns of people of color, communities of color, and their interest in the eradication of white supremacy. It also means being responsive to the needs and concerns of other whites with whom we may be struggling or working. It’s about taking constructive criticism seriously, integrating insights provided by others into your own work, and following the lead, direction, and advice of those who have the most to lose from antiracism work done badly: namely, people of color.¹⁷

Therefore, in addition to the feedback that we regularly seek from our entire membership, we will intentionally establish new feedback mechanisms to inform and validate the work we have outlined in this Strategic Framework with groups such as:

- Staff and Board members, particularly those who identify as Black, Indigenous, or people of color (BIPOC)¹⁸, whose lived experience puts them in the best position to identify and

¹⁸ We use the term BIPOC to describe Black, Indigenous, People of Color. We recognize that there are limits to language, and that language frequently changes. In using BIPOC, we want to acknowledge that people of color are not a monolith, nor do they all espouse the same beliefs.



build structures to mitigate racialized harm and power imbalances in our internal work as an organization and external work with members. Plainly stated we will seek feedback from board and staff whose racialized identities place them further from privilege and advantage.

- Members, especially BIPOC members, who:
 - » Have lived experience of racialized and other inequity and injustice
 - » Are in relationship to and allied with social justice movements
 - » Are allied in shifting philanthropic institutions toward racial justice and often face the emotional and unpaid labor of leading this work internally
- Philanthropic and nonprofit sector leaders, especially BIPOC leaders, who:
 - » Have built the foundations for and continue to shape racial equity work within the philanthropic sector and are working to create a more just and equitable ecosystem
 - » Are building and shifting power to historically marginalized groups through grantmaking, public policy, and partnerships
 - » Are supporting and leading efforts that demonstrate the possibility and impact of centering racial equity

The ability to receive and act on critical feedback is a necessary part of Philanthropy New York's accountability practice. PNY is keenly aware that the act of providing input requires work as well. Therefore, we will stay abreast of developments in the sector, especially calls for change that advance racial equity being made by key stakeholders—funders, philanthropic networks, and grantees. Requests for feedback will be purposeful and grounded in an understanding of systemic inequity as well as the current context. We recognize that there will be times when we are seeking input and expertise that require labor above and beyond the work that all PNY members contribute to this interdependent community. And, while we may seek feedback from people outside of our community PNY is committed to honoring that expertise and labor with compensation.

As we seek feedback to inform how well we are achieving the purpose outlined in this Strategic Framework, board, staff, and members have identified additional groups with which Philanthropy New York has varying degrees of trust. These include our philanthropy sector partner organizations, our nonprofit association partners, and more broadly, nonprofits and grassroots justice movement organizations. In our current state, we lack ongoing and trusting relationships with some of these groups. Therefore, throughout the course of the next five years, we will work to intentionally build trusting relationships with nonprofits and movement organizations that have been working to bring about a more equitable and just philanthropic sector to explore the ways that we can be more accountable to their work in the context of our role.



Operationalizing accountability

The journey to become an anti-racist organization necessitates a shift in how Philanthropy New York functions internally and engages externally. **As the organization continues to evolve, we commit to closing the distance between our intent and outcomes by establishing ongoing processes of implementation, outcome, evaluation and feedback, and course correction which leads to new practices.** PNY's accountability practice will leverage a strong culture of learning, build upon existing feedback mechanisms, and establish new mechanisms to support deeper understanding and engagement. PNY staff and Board will be an integral part of developing and implementing an accountability practice that can support and inform the ambitious change process articulated in this Strategic Framework.



Over the course of implementing this Strategic Framework, some of the questions we will be asking ourselves about our internal and external efforts include:

- 1. How are we successfully centering racial equity in our programming, public policy agenda, decision-making, culture, and communications?**
- 2. What has changed as a result of our efforts?**
- 3. Where are we diverging from our values?**
- 4. Have we caused harm? How do we address and repair any harm done?**

The purpose of establishing intentional and ongoing accountability processes is to improve our practices, internal and external, in service to racial equity. To better align our decision-making and actions with our values and vision, Philanthropy New York is examining how we learn, who we learn with, and how we solicit feedback.

In some instances, this will require bringing existing processes and mechanisms into greater alignment with our values, especially racial equity.¹⁹ Existing program evaluations, annual reporting, board and staff evaluations, member surveys, and focus group engagement will be examined and redesigned for this purpose. We will communicate how these tools are being redesigned and implemented and what we are learning with our membership.

Additionally, as part of our efforts to deepen and build new relationships, we will be exploring new ways of convening partners and stakeholders. While any new approaches will be carefully considered with board and staff, Philanthropy New York is committed to building greater trust with other philanthropic networks, local nonprofits, and social justice leaders and learning how we can be better allies in our shared vision and work for racial equity.

With this Strategic Framework, Philanthropy New York commits to an accountability practice that will keep us focused and progressing toward our goal to become an anti-racist organization. Guided by our relationships with staff and board as well as members, sector partners, and nonprofits, we will continue to listen and seek feedback.

As we live into our values, we invite all of you to work with us, to achieve our vision of an organization, and a sector, that is actively working to challenge the racism embedded in our structures, policies, and systems and advance a more equitable, sustainable, and democratic society.

¹⁹ Existing external mechanisms include: Annual Meeting, Annual Report to the members, Post-Program Evaluations, Committee on Members, and CEP Member Perception report. Existing internal mechanisms include: Quarterly Board Reports, Annual Board Report, Annual Budget, Annual Operational Plan, Board Orientation, Board Evaluation, Board Nominations Process, Board Committee Annual Racial Equity Commitment reporting to the board, Staff Performance Evaluations, and CEO Goals and Evaluation.



Endnotes

- 1 Philanthropy New York exists within an ecosystem that includes philanthropic organizations that are members of the PNY community; philanthropic organizations in the New York City metro area that are not members but are involved in the broader community; the people and entities that our members support; other philanthropy organizations that engage with funders; and institutions and policymakers serving the region.
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- 3 Edgar Villanueva, and William J. Barber. *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance*. Berrett-Koehler Publishers, 2018.
- 4 “An Open Letter to Philanthropy, from People of Color-led, Movement-Accountable Public Foundations,” *Groundswell Fund*. 09/08/2021, <https://groundswellfund.org/updates/open-letter/>
- 5 Reich, Rob. *Just Giving: Why Philanthropy Is Failing Democracy and How It Can Do Better*. Princeton: Princeton University Press, 2019.
- 6 “Before you quote Dr. King, here are some things you can do to be less of the white moderate he warned about,” Vu Le, *Nonprofit AF*, 01/17/2022. <https://nonprofitaf.com/2022/01/before-you-quote-dr-king-here-are-some-things-you-can-do-to-be-less-of-the-white-moderate-he-warned-about/>
- 7 Gita Gulati-Partee, and Maggie Potapchuk. *Paying Attention to White Culture and Privilege: A Missing Link to Advancing Racial Equity Vol 6*. The Foundation Review, 2014. <https://scholarworks.gvsu.edu/tfr/vol6/iss1/4/>
- 8 “Grantmaking with a Racial Justice Lens: A Practical Guide,” *Philanthropic Initiative for Racial Equity*. <https://racialequity.org/grantmaking-with-a-racial-justice-lens/>
- 9 Pauline Graham, and Mary Parker Follett, *Mary Parker Follett: Prophet of Management: A celebration of writings from the 1920s*, 113. Harvard Business School Press, 1995.
- 10 “What’s power got to do with it?,” Linda Guinee, and Barry Knight, *Alliance Magazine*, 09/01/2013. <https://www.alliancemagazine.org/feature/what-s-power-got-to-do-with-it/>
- 11 “Beyond Low-Hanging Fruit: Shifting Power, Changing Systems, and Organizing in Our Own Sector,” Farhad Ebrahimi, *The Center for Effective Philanthropy*, 2020. <https://cep.org/beyond-low-hanging-fruit-shifting-power-changing-systems-and-organizing-in-our-own-sector/>
- 12 “What’s power got to do with it?,” Linda Guinee, and Barry Knight, *Alliance Magazine*, 09/01/2013. <https://www.alliancemagazine.org/feature/what-s-power-got-to-do-with-it/>
- 13 Piper Anderson defines harm as microaggressions, acts of interpersonal racism and institutional policies that perpetuate unequal access to opportunities for people of color.
- 14 “Building a Culture of Accountability,” Piper Anderson, *Stanford Social Innovation Review*, 06/28/2021. https://ssir.org/articles/entry/building_a_culture_of_accountability#
- 15 Accountability and White Anti-Racist Organizing: Stories from Our Work, Bonnie Berman Cushing with Lila Cabbil, Margery Freeman, Jeff Hitchcock, and Kimberly Richards (2010).
- 16 “Building a Culture of Accountability,” Piper Anderson, *Stanford Social Innovation Review*, 06/28/2021. https://ssir.org/articles/entry/building_a_culture_of_accountability#
- 17 “Appreciation and Accountability,” Tim Wise, *timwise.org*. <http://www.timwise.org/appreciation-and-accountability/>
- 18 We use the term BIPOC to describe Black, Indigenous, People of Color. We recognize that there are limits to language, and that language frequently changes. In using BIPOC, we want to acknowledge that people of color are not a monolith, nor do they all espouse the same beliefs.
- 19 Existing external mechanisms include: Annual Meeting, Annual Report to the members, Post-Program Evaluations, Committee on Members, and CEP Member Perception report. Existing internal mechanisms include: Quarterly Board Reports, Annual Board Report, Annual Budget, Annual Operational Plan, Board Orientation, Board Evaluation, Board Nominations Process, Board Committee Annual Racial Equity Commitment reporting to the board, Staff Performance Evaluations, and CEO Goals and Evaluation.





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