



**President's Annual Report – 2020**

*November 16, 2020*

## Introduction

As we reflect on 2020 and what was accomplished, we tend to think of the year as starting in March with the pandemic exploding in NYC. We almost forget that in January and February we hosted **42 in person events**, organized a new approach to Foundations on the Hill, created plans for programs, committees, networks, working groups and new cohort learning modules that were based on our core mode of work — in person activities — for the remainder of the year. We knew that we were gearing up for an intense election season and used that knowledge to frame our approach to specific activities such as our Annual Meeting. (We were also planning for our two-day Board retreat at the lovely Pocantico facilities. Sigh.)

And, then NYC shut down and found itself in the center of the pandemic storm. A few short months later, the murder of George Floyd added to the many other killings by police of black men and women, stirred a national reckoning on racial injustice that brought people of all races to the streets in unprecedented numbers demanding change and seeking accountability.

As with other moments of crisis, whether focused in NYC, nationally, or globally, PNY staff drew upon our experience while also listening intently to our members in the moment to create a plan about how to best support foundations grappling with all that the year was bringing. We successfully stayed flexible enough to keep pivoting as we created strategies and then learned how to keep adjusting them. What I want to highlight for the Board, upfront, is that the staff worked together in true collaboration, supporting one another's work and needs. That collaboration, coupled with a deep commitment to our mission and to the moment, was the backbone of all that follows in these next few pages.

This report, like the end of year reports in the past, organizes our work as framed by our four strategic plan goals. (Yes, it is ONLY November — and we acknowledge more will happen this year!) This is year 4 of our 5-year strategic plan and some of the activities that came to fruition this year were started in earlier years. And some actions started this year remain a work in progress for next year and beyond. This report, along with the year-end reports of the last three years, provide a full picture of what PNY has accomplished in the four years of our current Strategic Plan (2017-2021). That five-year plan ends in December 2021. Accordingly, the staff and Board, with a new president, will be developing a new Strategic Plan over the course of 2021.

## **PNY's VALUES:**

At the March 2020 board meeting, the PNY Board approved a new set of values for PNY. These values have guided staff decisions this year. Here are a few examples:

**Equity:** Our understanding of Equity shaped actions as varied as our development of COVID programs (weekly calls for members), our policy statements, and how we used our resources to support staff in remote work. Internally, we undertook critical assessments in 2020, including finalizing our pay equity assessment and developing and implementing training for Committees around racial equity. Possibly of greatest value to our members, we held conversations and programs throughout the year focused on bringing racial equity tenets into the work of foundations. Finally, we developed, and in August launched, a racial equity resource page that has served as a launchpad for many members seeking direction.

**Learning:** The PNY team approached disruption with a spirit of adaptation, flexibility, and experimentation. PNY's entire staff, from learning services to finance, showed a willingness to learn and adapt quickly. Specifically, from March to now, we leaned into the role we played in providing spaces for learning within peer communities and pivoted from offering lecture presentations (51 webinars) to facilitating virtual meetings (161 Zoom meetings for peer networks, issue-based working groups, and other members). These virtual meetings focused on peer learning discussions or breakouts for members to engage in peer-sharing and reflective practice.

**Community:** As our membership shifted to working remotely from home, there was an increased appetite for staying connected with one another. We saw an increase of member institutions getting engaged with us, with 269 member institutions attending at least one program in 2020 (90.9% of our current membership). We also saw a 40% increase in the number of members attending programs, despite a higher percentage of drop-off rates between registrants and attendees. Overall, PNY offered 309 programs and events this year (count based on events in the calendar now through the end of the year and likely more will be added). This is a 9% increase from 2019. The number reflects how much our membership wanted to stay in community with each other as they navigated this very tough and complex year. We needed member support - to pull off a virtual Annual Meeting, to bring together a relevant and impactful Policy Series that reflected the moment, and we needed partnership with a range of nonprofits to ensure we could take swift policy action. We were buoyed by trusting partnerships and deep relationships with members and ecosystem partners.

**Leadership:** Over the past five years, we have invested deeply in the learning and professional development of staff. This meant that in a moment of crisis, our staff were able to lead from every level of the organization. Whether they crafted and delivered programs teaching our members how to use Zoom for board meetings or they informed key decisions around our communications or our internal information systems, our staff were ready to lead at every level of the organization. We similarly supported our members demonstrating leadership on critical national issues through peer connections and conversations.

What these thumbnail summaries show is that our values have served to center our work. What these summaries do not show are the experimentations PNY took over the last few years; the depth of staff capacity developed across these same years; and the level of trust our members have in us and each other, which all worked together as we responded to the many crisis' of 2020.

## **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 2020, Philanthropy New York offered several opportunities for our members to examine emerging trends and change their practices:

- **Annual Meeting:** We launched our [Humanizing Immigration Series: A Conversation in Three Parts](#), which was a result of converting the planned content of our Annual Meeting into three virtual sessions across three afternoons in May (May 14<sup>th</sup>, 21<sup>st</sup>, and 28<sup>th</sup>).

We took a close look at a topic that we believed would be a core election year subject – immigration – especially in the wake of rapidly-evolving federal policy. While immigration policies remain contentious in the United States, we rarely examine how narratives are created about who belongs and who does not – and why and when. The COVID-19 pandemic exposed contradictions between fear-based narratives about immigrants and stories of heroism from those same immigrants who work on the front lines. We examined the facts and myths of immigration, the forces driving polarization, the human face of current policies, and the importance of advocacy, coalition-building, and storytelling. And, with each of these sessions, we explored how philanthropy was, or could, support the work discussed.

The series saw an average of 86 attendees per session and engaged high profile speakers in the field, including Becca Heller, Cristina Jimenez, and Jose Antonio Vargas.

- **Corporate Webinar Series:** Corporate grantmakers experienced a spotlight on their work in their institutions. There was a shift in the critical importance of their function based on both COVID and even more, as a result of the racial justice work, corporations wanted to be seen supporting in a moment of intense public scrutiny. Many of our corporate members wanted to be in community with peers to talk about the changes they were managing. PNY responded with a series of intimate and frank conversations such as [Is COVID-19 Changing Business as Usual? The Corporate Response](#) and [Real Talk: Are CSR Teams Advancing Racial Equity and Justice?](#).
- **Power, Culture, and Difficult Conversations Series:** Recognizing that our members are interested in specific and actionable ways to build a more equitable culture within their institutions, PNY responded with a sold-out series of Fall programming. The series covered how to work with the range of dynamics that are present when humans work together. Each session built on the prior one and participants were encouraged to commit to all three workshops. We received an overwhelming response, with 100+ registrants per workshop.
- **Annual Debates:** Our annual debate series offers an opportunity for members to deeply examine a current issue related to the dynamics of philanthropic practice and policy in what we hope is an engaging format. We partner with Baruch College and SeaChange Capital Partners to produce these lively conversations and expand the community of voices and listeners that attend. This year, our debate featured [Ray Madoff vs. Daniel Hemel: Should DAFs Be Reined In?](#), which attracted 107 attendees.

- **Member Survey on Payout:** During CEO calls in the early summer, participants wanted to understand what decisions other foundations were making with regards to grantmaking payout in 2020. We conducted an informal survey of private foundation CEOs to provide participants with trend data by asset size and family versus non-family subcategory. The results of this survey allowed our members to make more informed decisions about their grant-spending in 2020 and as the pandemic continues, the upcoming year. It also let CEOs share what their peers were doing with their own boards – a tool many of our members appreciated having.

*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.*

- **Regular COVID Calls:** Beginning March 12<sup>th</sup> and going into the first week of May, PNY organized and hosted six COVID calls for members to ensure they had access to the most up to date and evolving information about the pandemic. The goal of these calls was to help members develop responses that were based on facts.

During Week 1 of our remote work, we lined up representatives from philanthropy, government, and community-based organizations to share updates about what the beginning of the shutdown was looking like from their perspective. We continued to host ongoing calls, identifying a specific focus for each of the following calls including racial equity, payout and endowment, and policy responses to the pandemic. The calls were all well attended by members.

- **New York Environmental Funders Network:** At the start of COVID-19, the New York Environmental Funders Network (NYFEN) asked PNY to host their calls to ensure that more members had access to their information. It is through these convenings that the City Parks Foundation's NYC Green Relief and Recovery Fund, a pooled fund aimed at supporting NYC's nonprofits who manage the City's green spaces, came to fruition providing funds to parks throughout the city. In addition to supporting this valuable initiative, the network engaged in frank conversations around equity, specifically in the environmental sector, through its regular meetings, conversations around the Green Relief Fund, and a convening with Chris Cooper about the Central Park incident on June, 2020.
- **HR Leadership Group:** Because the pandemic required unprecedented responses to supporting staff transitioning to remote work, PNY cultivated a smaller more intimate roundtable discussion group for HR leaders at some of our larger foundations that were grappling with complex decisions around supporting the workforce. They are centering their work on overall questions of organizational culture and risk management.
- **Leadership Transitions Funders Group:** We supported the emergence of a Leadership Transitions Funders Group at PNY. The goal of the collaborative learning group is to lift up grantee-centered practices that funders can employ to support grantees through successful, healthy leadership transitions. The group has centered racial equity in its learning and action with an explicit focus on supporting nonprofit leaders of color.
- **Learning Exchange and Discussions:** Expanding the continuum of racial equity learning that we offer at PNY continues to be a priority. This year, our membership will benefit from a partnership we developed with the Race and Equity in Philanthropy Group (REPG). Together, we have designed and launched a three-part intensive peer to peer program that will support

accountability and action around racial equity practices in foundations that previously attended our Leading with Race Equity six-month training. We recruited leaders who have committed to equity work and want support navigating the tensions around introducing new equity-focused policies and practices within their foundations. This small practice-based group will participate in three half-day facilitated discussions focused on integrating a commitment to racial equity into core strategy, data, evaluation and learning, and communications. We hope to use the learnings from this effort to support other similarly focused cohort-based groups in the future.

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

- **Program Partnerships:** We continue to nurture relationships with peer organizations, leading to original topic-specific and timely programming (PSFG, NCFP, FCCP, GCIR, MIF, AFN, etc.). With our partner philanthropy serving organizations, we were able to offer 55 webinars to our membership on timely topics including the climate crisis, supporting next-generation philanthropy, racial gerrymandering, and housing and homelessness narrative change.

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

- **Curated Content:** In response to the COVID-19 pandemic and the racial justice uprisings across the country, we curated a COVID Resource page *and* a Racial Equity Resource page for members. Both pages contain content specifically focused on ways that the philanthropic sector can respond with action steps, how to support grantees, lists of consultants, curated readings, and more. Our goal for these pages was to provide the membership with a one-stop shop where individuals and organizations can go to learn and act.
- **Amplifying thought leadership in the field:** Pivoting to all virtual programming has given us the opportunity to record more programming and leverage the content through post-program communications. We are experimenting with different methods with the goal of expanding the reach of programs beyond the audience in the virtual room. Our Insights column is an extension of our efforts to amplify thought leadership in the field. Insights are a strategy we have had for several years and this year, with the nature of virtual programming, we've taken advantage of using them to amplify key messages and takeaways from programs to continue conversations.
- **Website Redesign:** Behind the scenes work was underway in 2020 to build the bones for an upgraded website. The new website functionality will allow us to further curate information and programming for each member's needs while promoting opportunities for members to connect with one another on- and off-line. We are working with 30 PSO partners in the United Philanthropy Forum Knowledge Management Collaborative to prepare to move our websites to the newest version of Drupal in **2021/2022**.

## **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.*

- **Trustee Network:** Our seventh Trustee Reception represented our first foray into hosting this event virtually. Speakers from the Robert Sterling Clark Foundation – Diahann Billings-Burford, Jim Allen Smith, and Phil Li, with moderator Jason McGill, explored the Foundation’s evolving practice of Trust-Based Philanthropy. We plan to offer attendees the opportunity to engage in follow-up conversations, to determine if a core group wants to form to learn more together about how they might pivot their practices.

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

- **Program Officers as Champions:** The Fund for 2025 afforded us the opportunity to learn, listen and ultimately engage in intensive curriculum development and design to create a new leadership program for program officers with a number of years of experience in the field. We launched the pilot program with 15 cohort members in February 2020 and then made significant adaptations to the timeline, scope, and program execution in a virtual set-up.

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

- **E-Learning platform:** (You saw this in September!) With support from a core group of members, we have created the organization’s first online, on-demand introductory training course for our members. This partnership is a result of year-round demand for our popular Philanthropy 101 curriculum. Following an intensive negotiation with 6 partner foundations to scope the work, we engaged with an online instructional design team and our website tech team to build a curriculum and learning journey that is aligned with Philanthropy 101’s learning objectives. We have crafted an online portal that is native to our website and Salesforce database, which will allow us to observe the learner journey and provide organizational representatives with real time information. New employees will be able to access this new “on-demand” course directly on our website which allows us to make connections to other PNY programs and resources throughout their learning journey. We are entering our beta-testing phase at the end of this year, with a launch in early 2021.

The content consists of the key concepts from our 10 hours of in-person programming which have been distilled into 100 minutes of videos and interactive quizzes. The online learning tool does not replace our in-person Philanthropy 101 series but augments a new employee’s experience to the sector and reinforces some critical key messages, on-demand. We are entering our beta-testing phase at the end of this year, with a launch in early 2021.

*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.*

- **Public Policy Fellowship:** One of the largest-scale capacity building pieces of our Strategic Plan was the creation of the Public Policy Fellowship. The fellowship is a two-year, full-time employment opportunity for a recent graduate student to work with leaders across the philanthropic sector. The Fellowship is designed to support PNY's commitment to building diversity and equity in the philanthropic field and increase our organization's capacity to work with our membership. Our Public Policy Fellows facilitate issue-based working groups, develop and execute programs on current issues in the field, curate content for our media platforms and write insightful reports and publications. Our Fellows were key to meeting member demands for information, resources, and peer community throughout COVID. The Health, Education & Youth, Justice Reform, and International Funder Groups all significantly increased the number of meetings they wished to have – sometimes weekly – throughout the start of the pandemic. Kimberly Roberts and Shamira Lukomwa, both in year two of their fellowship, were instrumental to hosting these meetings as well as developing and deploying PNY policy statements in response to COVID.

### ***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 philanthropy 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.*

In 2020, PNY crafted a policy statement, using our expedited process, to immediately urge the inclusion of nonprofits in COVID relief legislation. We again used the process to amend our current Census policy position at the end of the summer. Below are details on both actions:

In March, the Public Policy Committee and Executive Committee rapidly approved an official policy position on supporting the inclusion of nonprofits in COVID-19 legislation. Once approved, the policy team sent letters and emails to elected and appointed officials at the City and federal level. These included:

- A letter to Mayor DeBlasio
- A letter to Senator Schumer
- Letters to 25+ City elected and appointed officials urging them to modify contracting and get dollars out to nonprofits
- Letters to NY Delegation representatives we visited during Foundations on the Hill in Washington DC.

As a result of our campaign, we were pleased to receive a special call with NYC officials to understand how they are adapting processes to support critical HHS nonprofits.



In the lead-up to Congress's summer break, we sent another round of letters to our representatives in Congress urging them to keep the needs of nonprofits at the forefront during the next COVID 19 legislation package.

As COVID dragged on and officials at the New York State level realized the budget implications of the pandemic, several nonprofits found that agencies were declining to register contracts, pay bills or provide advances for work. We partnered with the Human Services Council, New York Council of Nonprofits and several other statewide organizations to draft and send a letter to Governor Cuomo asking him to rescind [a July 6 executive order](#) that suspended New York's [prompt payment regulations](#). Nonprofit organizations that contract with New York to provide health care and other services say they may be forced to cut vital programs, lay off staff or even close if the state continues to delay payments — or consider retroactive cuts — as it grapples with the financial fallout of the coronavirus pandemic. More than 700 nonprofits signed onto the letter which was delivered in early August to the Governor's office.

Throughout the summer, we were able to sign quickly onto a number of statements supporting our peers and partners. These included signing onto the [AAPIP statement](#) against racism, particularly against the Asian American community. We also signed onto the [Independent Sector statement](#) asking banks to more rapidly support nonprofit applications for loans.

**Census 2020:** We amended our 2018 official policy position on a fair and accurate 2020 Census to respond to the Trump Administration's move to [shorten the time table](#) in which the Census could be completed. The Public Policy Committee and Executive Committee voted to approve the amendment, which states: ***Philanthropy New York discourages any action that will impair or prevent the Census Bureau's ability to conduct a full and fair count of every person living in the United States.*** This swift action allowed us to sign onto a national advocacy letter.

*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.*

- **Public Policy CORE:** In 2020, we substantially reworked the content to be responsive to COVID and racial justice uprisings. The three-part series began with our basic [Advocacy 101](#) and proceeded to a discussion of how to build [Powerful Advocacy Movements](#) by building grantee capacity. It ended with a discussion of the many [roles that foundations can play](#) in the advocacy spectrum. The series had an average of 43 attendees per session, with a high of 60 attendees at its launch.
- We followed up on the series with a communication strategy designed to engage both members that showed an interest in the programming and those that attended. We crafted a landing page on the website and a MailChimp campaign featuring key takeaways and quotes. This content provides members an opportunity to revisit the key lessons from the series and access the recordings for future use.

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

- **Educating lawmakers:** Each year, we join colleagues from around the country for the annual Foundations on the Hill visit. In 2020, we hired a DC based lobbying firm to see if the experience could be more effective for both PNY and our members. The goal was to get ‘good’ visits (senior level staff) and to focus on issues members care about rather than the general philanthropy agenda. This year we focused on the Census and homelessness. Despite the concern around the pandemic (we were at the Capital the very last day before the building was closed to the public), we were able to connect PNY members to senior policymakers and create a platform for PNY members to share their expertise and experience with issues connected to housing, homelessness and the census. It did feel more successful than past visits and we followed up with those we met within weeks about COVID legislation.

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

- **Digitize member renewal process:** A critical component of long-term sustainability is efficient and effective operations. The pivot to remote operations pushed us to fully digitize our membership renewal process – from invoices to payment to receipts. While we still have some members paying by check, we had a significant increase in payments by wire transfer and credit card and all members now receive their receipts by email. With the changes to our new online system, we were able to bring in memberships payments more quickly than expected with over half of our members (149 organizations) paying earlier than they did the previous year.

*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*

- **Learning Cohorts:** We have learned that members will pay for our deep dive, cohort-based experiences. This year we had more than 40 members apply for the Leading with Race Equity cohort (\$500 pp). And, we had 20+ members apply for the Program Officers as Champions program (\$1,500 pp). The revenues from these programs serve to cover the expenses of hiring skilled facilitators to work alongside PNY staff. It does not produce “extra” revenue.

*Examine new categories of membership while ensuring quality of service to existing members*

- We did not examine a new category of membership this year. For many years, our membership retention rate has steadily held firm at approximately 95%. Dues are calculated either on the average of three years of grantmaking or on endowment size. Both have increased as the market increases. 25% of PNY's largest members support the community by paying 75% of our total dues. Thus, long term sustainability using our current model relies heavily on the continued recruitment and retention of larger foundations. Those foundations are often enticed to join by existing relationships they have with PNY members. Our experience in membership recruitment tells us that larger foundations find value when they are ready to take part in learning and sharing as a community. We have had a robust set of new members this year but cannot attribute it directly to the pandemic.

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

- **Philanthropy 101 and PNY CORE courses:** Our perennially popular PNY CORE programs have been restricted to members as members contributed to the Fund for 2025 which supported the development of those programs. As a result, foundations have chosen to purchase a PNY membership to gain access to these programs.
- **E-Learning:** Our new E-Learning platform will offer us the opportunity to provide a paid premium service to non-members nationwide. This is likely a 2022 activity.

### **Lessons Learned:**

- The intense work over years to build strong relationships with individuals in our member foundations served as a critical connection. It helped to ensure that members turned to PNY, or responded to PNY's outreach, as the place to go to connect with peers during the initial weeks of this crisis.
- Going forward, there will be a new need to integrate remote connections into what had been only in person programs and activities at PNY as members adapt to a likely world of more remote staffers.
- Facilitating events online require some different staff/moderator skills than in person and requires professional level IT utilities and support.
- Maintaining staff culture and board culture in an all online world is hard – and different – and requires attention (Likely more attention than I provided this year).
- There are some great opportunities when events are fully online – speakers from others parts of the country, attendees who may not have made the effort to travel to the office – and there are costs in the loss of personal connections, random in the moment conversations, a group warmth and esprit de corps. These opportunities and costs both deserve focused attention as PNY thinks through its future models.
- Members turn to PNY in moments of need: The CEO groups were robust this year; the COO group met weekly for months; FAN; and more – people wanted the peer connection, learning and support that they get through PNY. This is our core strength.