

Center for Nonprofit Strategy and Management

Marxe School of Public and International Affairs, Baruch College, CUNY

Annual report, AY 2024-2025

1. Note

CUNY policy requires that the Center for Nonprofit Strategy and Management's (CNSM) Leadership Fellows New York (LFNY) program, which trains nonprofit professionals, report separately because the sponsored program must be administered through the CUNY Research Foundation (CUNY RF). The most recent LFNY report is provided as an appendix. That report covers the period 01 JAN 2024 to 28 FEB 2025 as required by the grant. CNSM receives recoveries from the LFNY program by agreement with CUNY RF and the Marxe School's Dean's office. LFNY participants attend CNSM events as part of their programming.

2. Purpose of this document

The purpose of this document is to comply with the memo dated 08 APR 2021 from José Luis Cruz, Executive Vice Chancellor & University Provost with the subject "Implementation of the Amended Board of Trustees Policy 1.09 (Guidelines for Centers, Institutes, Consortia and Special Programs)."

3. The mission of the center

The Center for Nonprofit Strategy and Management (CNSM) was established in 2007 to support current and future nonprofit professionals through research, education, and public engagement. Housed within the Austin W. Marxe School of Public and International Affairs at Baruch College, City University of New York, CNSM is Baruch's hub for activities serving the nonprofit and international NGO communities.

Center programming is designed to benefit the Baruch College academic community, New York City area nonprofit and NGO practitioners, and more broadly, the field of nonprofit and NGO management, leadership, and strategy.

The Center organizes and executes public events for nonprofit sector stakeholders. It is also a hub for discussing and coordinating research, teaching, and administrative activities among Baruch College faculty active in the nonprofit studies field.

4. The college president's attestation of the continuing value of the center in enriching and supporting the core mission of the college or the University

- Baruch College President David Wu attested to the recertification of CNSM on July 7, 2023 and the CUNY Board of Trustees recertified CNSM for five years on June 24, 2024.

5. The director's statement of the center's current progress toward meeting the goals stated in the strategic plan

The Center continues to execute successfully against the six strategic goals listed in its 2022 strategic plan. The Center's audience continues to expand (1). The Lane family endowment continues to grow (2). The Center's narrowed focus on zero and low-cost events continues to minimize operational costs (3). Students and faculty remain core constituents for Center activities, with increasing engagement nationally (4). The Center retains its director-agnostic model to reduce dependency on any specific individual as director (5). The Center continues to support the Marx School's outstanding reputation as a leader in the nonprofit studies field as evidenced by the School's high national ranking (6).

6. The center's staffing plan, with which the participating college presidents formally concur, and a report regarding the status of directors, given their term limits

George Mitchell is the Center's third director. He has served in that role since 2021. Don Waisanen became the PI for the Center's LFNY program in 2025 and is supported by two assistants.

7. A description of current and projected activities

Public events for AY 24-25 are listed below. LFNY activities are described separately in the appendix. Projected activities for AY 25-26 will include public events and social activities similar to the prior year. However, significant disruption to the AY 25-26 event calendar is expected due to the College's budget model transition.

CNSM's [website](#) contains a list of [past and upcoming events](#). CNSM also maintains a [video recording archive](#) featuring videos for many of its events. Anyone can [join CNSM's email list](#) to be notified of upcoming public events, all of which are free to attend. All CNSM's public events, including its in-person events, are livestreamed for accessibility.

- Fall NYC area nonprofit scholars lunch, 16 SEP 2024
- Nonprofit AI for Communications & Productivity (LFNY), 17 OCT 2024
- Worker Cooperatives in New York: New Models for Social Impact, 18 OCT 2024
- Advocating for People in Poverty: Getting Policymakers to Listen and Act, 19 NOV 2024
- CNSM fall 2024 semesterly stakeholder meeting and report, 25 NOV 2024
- Multi-entity Nonprofits: Combining Public Charities and Social Welfare Organizations to Power Grassroots Activism, 06 DEC 2024

- Women of Color Radiant Leadership Series, March 20, 2025
- Current and Future Policy Challenges facing the US Nonprofit Sector at Home and Abroad, 24 MAR 2025
- Seeing your supporters differently: Reaching Hearts and Minds Through Psychographic Segmentation, 09 MAY 2025
- NYC area nonprofit scholars happy hour, 08 MAY 2025
- CNSM spring 2025 semesterly stakeholder meeting and report, 09 MAY 2025
- How Civil Society Organizations Build Resilience in the Face of Financial and Political Pressures, 14 MAY 2025
- Other events (cross-promotional partnerships)
 - Board Diversity Includes Disabilities, BoardStrong, 29 OCT 2024
 - Talent Is Our Greatest Asset: Talent Trends in Healthy Organizations, Metro NYC BBB, 18 SEP 2024
 - Symposium: Entrepreneurship & Innovation as a Force for Good, Field Center, 21 NOV 2024
 - The Power of Community: Building Authentic Relationships with Supporters Metro NYC BBB) 27 FEB 2025
 - Law, Religion, and Civil Society (NYU), 20 MAR 2025
 - Managing Financial Challenges: Trends and Tools, Metro NYC BBB, 30 APR 2025
 - Reimagining Your Nonprofit's Strategic Vision: Navigating the Evolving Landscape (BBB), May 20,2025

8. Other selected news and activities

- The Lane family has repurposed its endowment from the annual gala to an annual award for faculty teaching and research. Jason Spicer won the inaugural 2025 award for his proposal, "Change Your Model, Change the World? Learning from Project ECHO."
- Michael Selzer retired. Don Waisanen assumed leadership of the Leadership Fellows New York program effective spring 2025.
- The Marx School remains at #18 among all graduate programs nationally for nonprofit management according to US News and World Report.

9. A current and projected budget including individual project budgets, a tax-levy budget showing expenditures of these funds, a chart indicating the sources of staff and faculty salaries, and a plan that specifies how the center will aim to sustain its activities and operations

- The AY 24-25 budget is provided below.

| Funding source | | Expenses | |
|-------------------|------------|----------------|------------|
| CNSM BCF accounts | \$5,587.75 | Event catering | \$2,037.75 |
| | | Memberships | \$1,000.00 |
| | | Software | \$2,550.00 |
| | | | |
| | \$5,587.75 | | \$5,587.75 |

- The projected AY 25-26 budget is provided below.

| Funding source | | Expenses | |
|-----------------------|-------------|--------------------------|-------------|
| CNSM BCF accounts | \$ 6,500.00 | Director reassigned time | \$13,000.00 |
| CNSM CUNY RF accounts | \$ 6,500.00 | | |
| | \$13,000.00 | | \$13,000.00 |

- CNSM is not budgeted to spend tax levy funds for AY 24-25.
- CNSM has no tax levy staff.
- The CNSM director is a professor. CNSM's LFNY program's PI is a professor. Professors are supported by tax levy funds and supplemented by BCF funds as appropriate. Reassigned time for CNSM and LFNY administration is budgeted to be paid for by non tax levy sources.
- Starting AY 24-25 CNSM directly receives cost recoveries from the LFNY program into a CUNY RF account on which the CNSM director is the PI. These funds are anticipated to generate about \$6,682 annually. Additionally, CNSM currently has about \$41,000 in unrestricted funds in BCF accounts that can be spent down as needed to continue operations. Assuming a steady state, this provides about six years of continued funding. During this time, CNSM will continue to explore opportunities for generating philanthropic income.
- CNSM's non LFNY costs typically include reassigned time and event catering. These costs are budgeted to be paid for with non tax levy sources. CNSM currently has about \$30,000 available to support events. However, the Center has suspended event catering. CNSM events have no other direct financial costs apart from the director's time.
- CUNY policy requires the Center's externally sponsored LFNY program to account for its operations separately. The most recent LFNY budget is attached. The costs for the LFNY program are covered by the program's external grant.

Thank you,

George Mitchell

Director, Center for Nonprofit Strategy and Management

10. Appendix (LFNY 2024 final report)

2024 Final Report

**submitted by The Austin W. Marx School of Public and
International Affairs at Baruch College/City University of New
York**

to The New York Community Trust

By:

Don Waisanen, PI
Shel Ho, Administrative Director
Jenée Gerald, Communications Officer
Leadership Fellows New York
Austin W. Marx School of Public and International Affairs
Center for Nonprofit Strategy and Management
Baruch College, City University of New York

Date Prepared: February 20, 2025

Grant # P22-001011

Final Report, January 1, 2024 to February 28, 2025

Submitted by:

Don Waisanen

PI, Leadership Fellows New York

Professor, Baruch College, Marxe School of Public and International Affairs, City
University of New York

Shel Ho

Administrative Director, Leadership Fellows New York

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Communications Officer, Leadership Fellows New York



This grant was awarded to the Baruch College Austin W. Marxe School of Public and International Affairs via the CUNY Research Foundation. Its purpose is to support a leadership and management development program for mid-career practitioners of select New York Community Trust grantees. Relevant documents are attached to this PDF.

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1. Introduction

Purpose

Leadership Fellows New York helps mid-career nonprofit professionals prepare for senior leadership roles in New York-area organizations. It is an initiative of The New York Community Trust created in partnership with the Austin W. Marx School of Public and International Affairs at Baruch College and its Center for Nonprofit Strategy and Management.

Our Vision

We envision a future where nonprofit leadership reflects the diverse communities it serves. We aspire to build a sector led by empowered leaders who drive social justice, racial equity, and organizational growth.

Our Mission

LFNY builds a strong, diverse network of nonprofit professionals, equipping them with the knowledge and skills to lead with a focus on social justice and racial equity.

Objectives

Our yearly program objectives are:

- To equip 50-60 mid-career practitioners, chosen each year from foundation grantee organizations, with the knowledge, competencies, and skills to be more effective managers and leaders.
- To support these practitioners in applying their newly learned skills within their organizations.
- To develop participants' understanding and appreciation of both the overall nonprofit sector in the greater New York City region and the impact of local, state, and federal government policies and regulations on their work.
- To foster a network of graduates who can learn and find support from their peers within and across the different sub-sectors of the New York nonprofit community.
- To connect practitioners with leaders and policymakers in the New York metropolitan region.
- To provide a malleable curriculum that enables fellows to identify and enhance their particular talents.
- To create an appetite for lifelong professional development.

Outcomes

Our yearly expected outcomes are:

- To deliver an outstanding leadership development and management training program for mid-level nonprofit managers.
- To conduct two cycles of the Leadership Fellows program, each providing at least 25 nonprofit professionals with extensive training on nonprofit leadership, financial management, communication, resource mobilization, assessment, and other vital areas.

- To manage mentor matches and relevant resources to complement the program curriculum and each participant's professional development.
- To organize high-level conversations with leaders in the nonprofit sector, government, and foundations, along with other in-person and virtual activities for current fellows and alumni.
- To share leadership development practices and strategies broadly through print and online publications.

In the following pages of this report, we will discuss our activities in relation to each of these goals and ensure that the Trust's investment in the future of the New York nonprofit sector has been duly honored.

2. Highlights

The following highlights serve as a summary of the 2024-2025 year for our fellowship:

- Director Michael Seltzer has retired from the Leadership Fellows program after nearly 10 groundbreaking years serving as the program's founder. He has also retired from teaching at Baruch College.
- We have subsequently hired a new PI (Project Investigator) for the program, Don Waisanen, Ph.D. Don is currently working on updating and building new systems for the program.
- The Trust itself conducted an external assessment of our program which revealed the full extent of the work that we have been doing and indicated that the LFNY program reflects positively on the Trust. Recommendations for the Trust and for program staff have been taken into consideration for the 2025 grant cycle.
- Over the course of this grant cycle, 56 people applied for the Spring 2024 cohort, and 37 people applied for the Fall 2024 cohort. More on this can be found in our recruitment section.
- We accepted, and subsequently graduated, 32 fellows from the Spring 2024 cohort, and 30 fellows from the Fall 2024 cohort.
- We hosted three Leadership Conversations on various topics of importance to the sector, including public policy issues, the impact of AI on nonprofit work, and the influence of federal, state, and local government on nonprofits.
- As in years past, we have seen the promotions of several fellows to senior leadership positions within their organizations or at other nonprofits in the New York City area. For 2023-2024, these promotions

include:

- **Kelly Coyne (Spring 2017)** was promoted to Chief Program Officer at Safe Horizon.
 - **Geordana Weber (Fall 2018)** was promoted to Chief Program Officer at SPOP (Service Program for Older People).
 - **Maribel Martinez-Gunter (Fall 2018)** was promoted to Deputy Project Director at Bronx Legal Services.
 - **Kylie Repasy (Fall 2020)** was promoted to Vice President of Programs at America on Tech.
 - **Nicole Galasso (Fall 2020)** was promoted to Chief of Staff at Randall's Island Park Alliance.
 - **Eve Wolff (Fall 2021)** was promoted to Executive Director at Dancing Classrooms.
 - **Rosa Santana (Spring 2022)** was promoted to Co-Executive Director at Envision Freedom Fund.
 - **Tina Goodrich (Spring 2022)** was promoted to Vice President of Supportive Services at HELP USA.
 - **Denise Acron (Spring 2023)** was promoted from Unit Director to Deputy Director of Manhattan Legal Services.
 - **Abby Verbosky (Fall 2023)** was promoted to Director of Data and Impact at Reel Works.
 - **Kat Meyers (Fall 2023)** was promoted to Attorney-in-Charge of the Civil Practice at The Legal Aid Society.
 - **Ariel Young (Spring 2024)** was promoted to Senior Director of Drop-In Programs at The Ali Forney Center.
 - **Anna Danzinger Halperin (Spring 2024)** was promoted to Director of the Center for Women's History at The New York Historical.
- Transfers include:
 - **Amanda Rosenblum (Spring 2017)** was hired as the Chief Program Officer of JCC.
 - **Cheryl Morgan (Fall 2018)** was hired as Associate Vice President for Institutional Advancement at the Wildlife Conservation Society.
 - **Jeff Wills (Fall 2018)** was hired as the Chief Operating Officer at Academy for Teachers.
 - **Jon Harper (Fall 2018)** was hired as the Chief Operating Officer at the Irish Arts Center.
 - **Gabrielle Apollon (Spring 2021)** was hired as the Director of the Haitian Immigrant Rights Project at NYU Law's Global Justice Clinic and also serves as Coordinator of the Hemispheric Network for Haitian Migrants' Rights.
 - **Hayley Ferber (Spring 2021)** was hired as the Artistic &

- Development Director of the Pelham Art Center.
- **Tina Huang Abrams (Fall 2021)** was hired as Deputy Administrative Chief of Staff at The Public Theater.
 - **Jennifer Kalter (Fall 2022)** was hired as the Director of Education and Public Programs at Morgan Library & Museum.
 - **Arielle Burlett (Spring 2023)** was hired as the Senior Grants Manager for Sustainable Harvest International.

3. Activities & Results

3.1 Recruitment

We are pleased to report strong recruitment results for our Spring and Fall 2024 cohorts. We received a total of 93 applications—56 for Spring 2024 and 37 for Fall 2024—reflecting the ongoing interest in our program and its value to our Fellows.

Two-year Summary:

- Spring 2023: 67 applicants
- Fall 2023: 65 applicants
- Spring 2024: 56 applicants
- Fall 2024: 37 applicants

As usual, in each recruitment cycle, we used targeted email campaigns, one-on-one conversations with prospective applicants, a virtual open house (information session), and outreach to the executive directors of our partner foundations' grantees to encourage applications.

We ultimately chose to accept 32 Fellows in the Spring 2024 cohort and 30 Fellows in the Fall 2024 cohort.

Though we had no trouble accomplishing and exceeding the Trust directive of accepting 25-30 Fellows per cycle, Fall 2024 generated some of the lowest numbers of prospective applicants in recent years. We do not believe that there is cause for concern and will implement corrective measures if interest continues to appear to decrease. Lowered turnout for 2024 may have been influenced by several factors, such as New York nonprofits bracing for uncertainty regarding the outcome of the 2024 presidential election. Additionally, Spring cohorts consistently attract more applicants than Fall cohorts due to seasonal variation. We have heard consistently from participants that many nonprofits structure schedules around their fall programming, which makes it difficult to allow staff to participate in professional development training toward the end of the year.

We are grateful for the sustained, strong interest in our program, which reflects its quality and popularity, especially in light of the increasingly competitive nature of our nomination process. We will keep a close eye on application trends moving forward.



Members of the Fall 2024 cohort at graduation.

3.2 Faculty & Curriculum

Our program is structured around three components: 10-12 topic-focused sessions held over the course of 3-4 months, the development of an organizational initiative, and supporting benchmark assignments.

All Fellows work on a real-world initiative for their organization as part of the program. This project, called the “change project,” is the main task that they need to complete throughout the fellowship. It should address a leadership or management challenge or opportunity in their organization. The change project helps fellows practice the skills they learn in the program and takes them through the whole process of starting, developing, and carrying out an organizational initiative. This experience prepares fellows to take on bigger leadership roles in the future.

Our curriculum, as well as the set of instructors who teach for us, is malleable and subject to change based on feedback from each cohort, and the climate of the nonprofit sector during a given fellowship cycle.

Internal assessments of our newest session show that 90% of program participants felt that their knowledge in that subject area improved, and 100% agreed that the instructors should be invited back to teach for the next cohort. Although we have several core instructors, we have introduced several new instructors and topics. The newest core offerings in our curriculum are:

Communications for Tomorrow's Leaders

by Marti Fischer

Using a big-picture framework for managerial and leadership communication that can be immediately implemented in everyday work, this interactive class will offer fellows the newest, evidence-based tools for presenting information in an engaging and effective manner to people in varying settings and at all different levels of an organization. Following research that consistently demonstrates what the top expectations are for excellent public communicators, particular attention will be placed on translating complex material in oral and written communication, techniques to increase confidence and influence, strategies for building a case, and best practices in group decision-making methods, communication styles, and audience interaction.

DiSC and Project Management

by Melissa Shillingford

Everything DiSC® is a personal development learning experience that measures an individual's preferences and tendencies based on the DiSC® model. This simple yet powerful model describes four basic styles: D, i, S, and C, and serves as the foundation for the Everything DiSC Application Suite. Participants receive personalized insights that deepen their understanding of self and others, making workplace interactions more enjoyable and effective. The result is a more engaged and collaborative workforce that can spark meaningful culture improvement in your organization.

Fundraising and Resource Mobilization

by Marvin Vilma

This workshop delves into essential strategies for effective resource mobilization. Develop strong communication skills to connect with potential donors, learn how to evaluate and monitor your activities for improvement, and build a solid understanding of gift pyramids and donor personas. Explore the importance of crafting a clear logic model that demonstrates your impact. Whether you're a seasoned fundraiser or just starting out, gain valuable insights and practical tools to maximize your fundraising efforts, secure grants, and achieve your financial goals.

Another new session that has become a staple in our curriculum is “**Change Project Review Day.**” The session is led by the Leadership Fellows staff and was implemented in response to fellows stating that they wanted more time to focus on their change projects throughout the program. Fellows have an opportunity to discuss their projects with groups of their peers, offer feedback, and assist informally with their development. Including this change project review day into our curriculum has given fellows additional insight through outside conversations with their mentors and with sector peers, who have

knowledge from different organizations and agencies.

Below is a breakdown of the topics that change projects focused on for the 2024 cohorts:

Change Projects



The 2024 fellows' change projects break down as follows:

- 15.7% Developing Impact Measurement Assessment Tools
- 13.7% Strategic Planning
- 13.7% Other
- 11.8% Collaboration, Strategic Alliances, Partnerships, and Mergers
- 11.8% Financial Management, Planning, and Forecasting
- 9.8% Fundraising
- 9.8% Management
- 7.8% Navigating Organizational Change
- 3.9% Governance and Board Development
- 2.0% Communications

This distribution of project topics reveals several key insights:

1. Impact measurement is the top priority, with 15.7% of projects focusing on developing assessment tools. This suggests a strong emphasis on quantifying and demonstrating organizational effectiveness.

2. Strategic initiatives are highly valued, with Strategic Planning (13.7%) and Collaboration/Partnerships (11.8%) among the top focus areas. This would indicate that many organizations are concerned with planning for the future.
3. Financial considerations are also prominent, with Financial Management (11.8%) and Fundraising (9.8%) collectively accounting for over 20% of projects. This highlights the importance of fiscal health and sustainability for nonprofits.
4. There's a notable interest in organizational development, with projects on Management (9.8%) and Navigating Organizational Change (7.8%) prominently featured.
5. A significant "Other" category (13.7%) demonstrates the wide range of challenges and opportunities fellows are addressing in their organizations.
6. Lower percentages for Governance (3.9%) and Communications (2.0%) might indicate these areas are either well-established or considered less critical for immediate focus.

Overall, the data suggests that fellows are primarily concerned with measuring impact, strategic growth, financial stability, and effective management in their organizations. The "Other" category will be examined in more detail to explore what organizations are working on that does not fall into the above categories. This information may help us make curriculum decisions for the upcoming 2025 cohorts.



Members of the Spring 2024 cohort at graduation.

3.3 Mentorships

As an integral component of the fellowship, each participant is assigned a mentor to facilitate the development of their change project and support their professional growth. Our organization has curated a diverse pool of mentors, carefully selected to represent the breadth of expertise within the philanthropic sector. These mentors are

distinguished thought leaders, accomplished practitioners, and recognized experts in their respective fields.

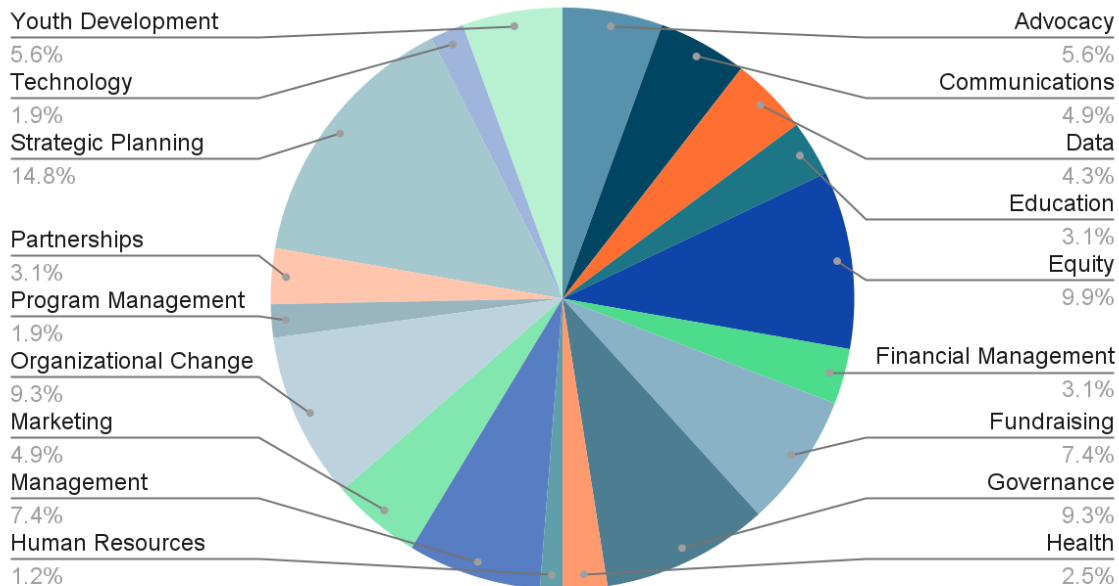
We encourage fellows to actively participate in the selection of their mentor. Each fellow is entitled to a minimum of four one-hour mentoring sessions throughout the duration of the fellowship program.

In 2024, LFNY explored the implementation of a new mentorship platform, Dreami, which promised automated matching capabilities, meeting tracking functionalities, and additional features beneficial to fellowship administration. However, upon thorough evaluation, the demonstrated functionalities did not meet our organization's standards, resulting in the postponement and ultimate cancellation of the Dreami platform implementation.

Following an internal review, it was determined that the existing system of facilitating mentor-fellow matches through email correspondence and direct outreach remains satisfactory. Nevertheless, our organization recognizes the need to enhance the efficiency of the matching process. We aim to expedite and advance the timing of mentor-fellow pairings within the fellowship timeline to ensure optimal participant satisfaction and program efficacy. We will be experimenting with a new process for manually matching fellows with mentors in the 2025-2026 cycle.

One consideration we have proposed is dropping our traditional mentor selection quiz and leaving mentor assignments up to staff. Historically, we have allowed fellows to begin choosing their own mentors toward the halfway point of the program, which has often resulted in delayed mentorship considerations and mentorship arrangements lasting past the fellows' graduation date. This results in several issues, both administrative and financial. We thus intend to roll out new policies setting more parameters around the mentorships.

Mentor Categories



The connections formed between mentors and mentees often last past the fellowship, with mentors extending help beyond the required four meetings. Due to this insight, we believe there are additional opportunities to engage our mentors further as stakeholders.

3.4 Diversity, Equity, and Inclusion Report

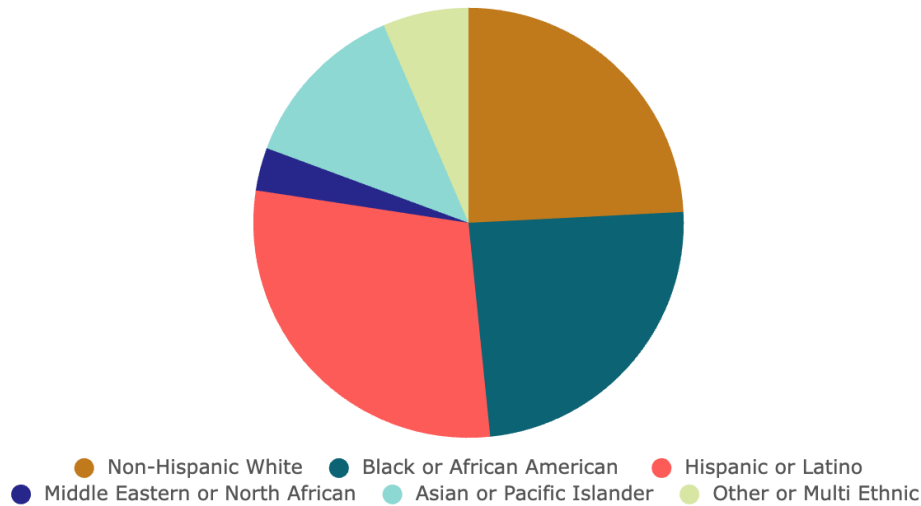
In keeping with our goal for the fellowship to be representative of all communities, especially those that have been historically marginalized, we are continuing efforts to diversify our cohorts by collecting demographic data on each year's participants. Please note that demographic data is not a consideration in the admissions process. However, we believe in supporting emerging leaders from BIPOC, immigrant, and gender non-conforming backgrounds.

The gender information below reflects a strict gender binary and may therefore be flawed in its representation of our fellows. Fellows tend to self-identify within the gender binary on the application form but often reveal a non-conforming status after participation and psychological safety is established. To address this discrepancy and improve the accuracy of our DEI data, we are considering the implementation of an exit survey for graduating fellows. This additional data collection point could provide a more comprehensive picture of our participants' gender identities. Moving forward, the program plans to collect more detailed and accurate gender identity data throughout the fellowship cycle. This initiative aims to enhance our understanding of our fellows' diverse identities and further

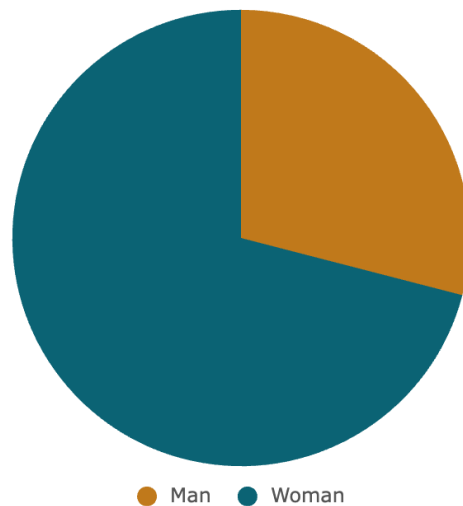
support our commitment to creating an inclusive environment.

Our DEI data for the 2024 grant year is as follows:

Ethnicity



Gender



Upon completion of the Fall 2024 cohort, 566 fellows have graduated from our program. Our cohorts have historically skewed toward women and BIPOC. We began asking applicants to include their ethnicity in their nomination forms starting in Spring 2023 to collect additional demographic data on the groups

participating in the fellowship.

The 2024 cohorts were made up of 71% women and 29% men. This is not unusual and reflects broader trends in the nonprofit sector. Looking at the ethnicities represented in the cohorts, 29% were Hispanic or Latino, 24.2% were either Black or African American, or Non-Hispanic White, 12.9% were Asian or Pacific Islander, 6.5% were Other or Multi-ethnic, and 3.2% were Middle Eastern or North African.

A brief set of key takeaways:

- The cohorts demonstrate considerable ethnic diversity, with no single group forming an overwhelming majority.
- We continue to support groups that have been historically underrepresented in leadership positions, particularly Hispanic/Latino and Black/African American participants.
- The diversity in the cohorts suggests that LFNY continues to be a successfully inclusive program, though there may be opportunities to increase representation from some groups, particularly among participants with Middle Eastern/North African backgrounds.

3.5 Leadership Conversations



Michael Seltzer and Meg Barnette at our May Leadership Conversation.

Our Leadership Conversations remain a key part of our program. These panel discussions, led by moderators with guest speakers, bring together fellows, alumni, mentors, and faculty. They offer a chance to connect with leaders from nonprofits, foundations, and government beyond our regular sessions.

Over the last year, we hosted three Leadership Conversations. This is less than our usual deliverable and reflects in part the unexpected hospitalization that outgoing Director Michael Seltzer experienced in early 2024. (Our Leadership Conversation planning resumed upon his discharge). However, we also feel that our Leadership Conversation programming has been best when quality is prioritized over quantity, and we have set a new target of at least four Leadership Conversations per year, which will allow us to prioritize the thoroughness and timeliness of our topics relative to the nonprofit sector.

The conversation topics we covered this year are as follows:

May Leadership Conversation
Public Policy Issues Facing New York Nonprofits
May 20, 2024

A discussion about the most pressing issues organizations in the New York City nonprofit sector are contending with in their work. As an essential force in our city's social fabric, organizations dedicated to serving our communities are often faced with navigating a complex landscape of policies to carry out their missions.

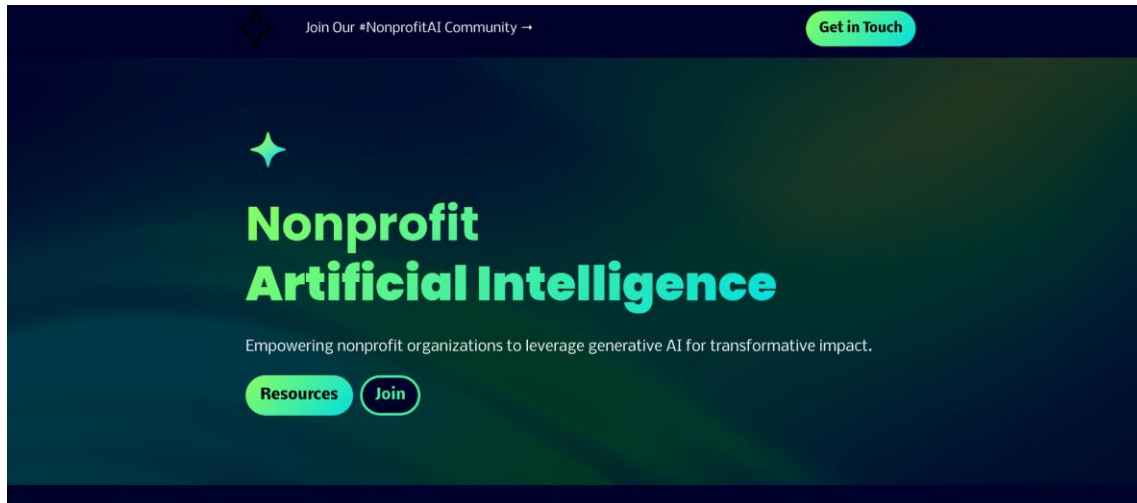
Speakers:

- **Meg Barnette**; Chief Executive Officer; Nonprofit New York
- **Michael Seltzer**; Director; Nonprofit New York

October Leadership Conversation
Nonprofit AI for Communications & Productivity
October 17, 2024

A discussion about how artificial intelligence can support nonprofit practitioners to enhance communication and boost productivity. The conversation included two portions: a panel discussion about AI's application for nonprofit organizations and a workshop with several breakout groups, with guided activities based on familiarity with AI.

This was a highly publicized and well-attended event, which still has its own website: <https://nonprofitai.net/>



The nonprofitai.net website created for this Leadership Conversation by our planning partner and lead moderator, Jamie Lonie.

Speakers:

- **Jamie Lonie**, Founder; Amplifi Digital
- **Victoria (Vic) Lee**; Co-Founder and CEO; Welcome to Chinatown
- **César Ventura Tapia (Spring 2024 Fellow)**; Program Manager; Center for Youth and the Future of Work
- **Zach Phillis (Spring 2024 Fellow)**; Senior Program Manager; Promise Project

December Leadership Conversation

What's Next: Reports from Federal, State, and Local Government

December 12, 2024

A conversation exploring the evolving landscape of the impact of federal, state, and local governments on the nonprofit sector and its constituents. The conversation focused on nonprofits' vital role in addressing societal challenges and finding opportunities for the sector going forward.

Speakers:

- **Ben Kershaw**; Director of Public Policy and Government Relations; Independent Sector
- **cori schmanke parrish**; Co-Director; Advocacy Institute
- **Drew Gabriel (Fall 2024 Fellow)**; Vice President of Intergovernmental Affairs; CAMBA
- **Jacqueline M. Ebanks**; Interim President and CEO; Nonprofit New York

We will continue to plan robust Leadership Conversations to give back to our fellows and the greater nonprofit community.

3.6 Communications

Our internal and external communications remain mostly unchanged for 2024, but in 2025, we anticipate carrying out a reskin of several communication elements. Our 2022 rebranding and subsequent graphic redesign will soon incorporate the Trust's branding to reinforce the relationship of the fellowship as a program of the Trust.

Following the stepping down of our previous Director, Michael Seltzer, and the appointment of his successor, Don Waisanen, as PI, we've decided to reconsider how to engage our stakeholders. The Knowledge Hub served as a compendium for all relevant nonprofit news, but feedback from our audience has led us to the conclusion that we need to engage with them beyond providing a curated selection of sector-wide applicable resources and instead equip them with more tailored information ready to use. Our plan for 2025 is to instead release a monthly newsletter that has several items of value for our list: news and updates on the fellowship, an interview with a past alum of the program, curated job openings and articles, and other relevant content that can best serve the needs of our audience.

3.6.a. Mailchimp

Our external communications are sent mainly through the marketing automation platform Mailchimp. Since implementing Mailchimp for our external communications, we've seen a steady uptick in audience engagement and plan to continue to leverage the platform to extend our reach to the wide New York City nonprofit community.

3.6.b. Website

Data from Google Analytics shows that we have had a substantial amount of new website visits within the last year (January 1- December 31, 2024), with 11,935 new users. This is a 65 percent increase from 2023, with 7,801 new users. The total number of users of our website (new and returning) stands at 11,040 users, a 41 percent increase from the previous year at 4,480. Each year of the fellowship, we experience growth in the number of new users (first-time website visitors) from the last year. We can expect the trend to continue into 2025.

Of note, with respect to the total number of users on our website, we typically see a spike during our recruitment periods, and this year was no different. We experienced a spike in March and August with the beginning of our recruitment period for the Spring and Fall 2024 cohorts, respectively, and then again in April and September with the end of recruitment and the beginning of the cohorts.

3.6.d. Social Media

Considering recent developments in the social media landscape, we've decided to remain focused on maintaining and expanding our presence on LinkedIn. Our LinkedIn currently has 552 followers, comprising program alumni, instructors, mentors, and various organizations and foundations in the philanthropic sector. Regular updates on recruitment, events, and milestones are shared with our audience, who engage regularly and share and repost our content.

3.7 Personnel

Our program's staff consists of the following individuals:

Michael Seltzer

Director, Leadership Fellows New York

Distinguished Lecturer, Baruch College, Marxe School of Public and International Affairs

Michael Seltzer has served as the Director of Leadership Fellows New York since its inception in 2015. In that capacity, he is responsible for the identification and recruitment of faculty, Leadership Conversation speakers, and mentors. In addition, he does outreach to potential recruitment partners, such as Black Agency Executives, Nonprofit New York, and the Asian-American Federation. In his role as a distinguished lecturer at the Baruch College Marxe School of Public and International Affairs, City University of New York, he teaches a variety of graduate courses related to management and leadership, philanthropy, the nonprofit sector, race policy, cross-sector collaborations, and resource mobilization. As part of his service to the College and the University, he also serves as a member of the Marxe School's standing Diversity, Equity, and Inclusion Committee, the Provost's advisory committee on Diversity, and the CUNY University-wide Advisory Council on Diversity, Equity, and Inclusion.

He is a member of the board of directors of the Gbowee Peace Africa Foundation-USA, an international advisor to the Gbowee Peace Africa Foundation, based in Monrovia, Liberia; a member of the executive committee of the Life After the Foundation Society, and chair of its flagship New York City chapter. He has been a regular contributor to PhilanTopic, the blog of the Foundation Center. His articles have appeared in the blogs of the Council on Foundations, Philanthropy New York, Inside Philanthropy, United Philanthropy Forum, HistPhil, the National Committee for Responsible Philanthropy, and the Huffington Post.

Don Waisanen, Ph.D.

Professor, Baruch College, CUNY Marxe School of Public and International Affairs

Don Waisanen is a Professor at Baruch College, CUNY Marxe School of Public and International Affairs, where he received the Presidential Awards for Distinguished Teaching and Distinguished Scholarship. He teaches courses and workshops in public communication—including executive speech training, communication strategy, and seminars on storytelling, conflict and negotiation, and leadership and improvisation. He has been an instructor, mentor, and advisor in the Leadership Fellows program since its inception in 2015.

All Waisanen's research seeks to understand how communication works to promote or hinder the force of citizens' voices. Since "every human advancement or reversal can be understood through communication" (Walter Annenberg). He is the author of seven books, including *Leadership Standpoints* (Cambridge University Press; a book about the the Leadership Fellows program itself), *States of Confusion* (New York University Press), and *Improv for Democracy: How to Bridge Differences and Develop the Communication and Leadership Skills Our World Needs* (State University of New York Press).

Shel Ho

Administrative Director
Leadership Fellows New York

Shel Ho serves as the Administrative Director of Leadership Fellows New York, a premier professional development program for mid-career nonprofit practitioners in the metropolitan New York City region. In this role, Shel plays a pivotal role in ensuring the smooth and efficient operations of the organization, overseeing all administrative and logistical functions, and contributing to the overall success of the fellowship program.

Beyond administrative responsibilities, Shel is passionate about supporting the development of nonprofit leaders and fostering a vibrant and inclusive community within the program. Shel received a BA in journalism from Baruch College under the full-tuition Harnisch Foundation Journalism Scholarship and is currently pursuing an MBA at NYU.

Jenée Gerald

Communications Officer
Leadership Fellows New York

Jenée Gerald joined the staff of Leadership Fellows New York in 2022 and serves as the Communications Officer. In that capacity, she handles critical day-to-day communications for the program, including communications with the fellows, faculty, and mentors, social media updates, and updates to our Knowledge Hub and Knowledge Mailing. Jenée received a BA in Business Communications and an MIA in Trade Policy and Economic Governance from Baruch College.

Great Believer

A Brooklyn-based communications firm that specializes in web development and design, development of print materials, communications, and overall branding strategies. Its clients have included the City Bar Justice Center, Sanctuary for Families, the Point Foundation, Sunset Parks Elementary School, Mt. Sinai Health Partners, the New York Community Trust, and many others. Great Believer has kindly attached a supplementary document explaining their role and plans for the 2023 grant year to this proposal.

Project Budget & Expense (With GL Pending Entries)

| | | | |
|--------------------------|-----------------------|-----------------------------|--|
| PERIOD ENDING: | February, 2025 | Run Date: | Friday, February 21, 2025 |
| Project#: | 7A031-00 09 | Project Administrator (PA): | Cristina Bagatta 212-417-8471 |
| Award ID: | P22-001011 | Assistant (APA): | Diana Panora 212-417-8461 |
| College: | BARUCH COLLEGE | Title: | NY COMMUNITY TRUST FELLOWSHIP CORE |
| Budget Period: | 04/01/2023-03/31/2025 | SubFund/Agency Group: | NPORG/NEW YORK COMMUNITY TRUST AKA COMMUNITY FUNDS, INC. |
| Principal Investigators: | Waisanen, Don | Department: | Public Affairs |

% of Time Elapsed: 94.79; % of Budget Used: 97.31 (Budget Used=Encumbrance + PTD Activity)

| Object Code | Description | Budget | Encumbrance | Month Activity | YTD Activity | PTD Activity | Available Bal |
|-------------|---|-------------------|------------------|------------------|-------------------|-------------------|------------------|
| 5405 | Project Associate | 0 | 0 | 0 | 13,665.38 | 13,665.38 | -13,665.38 |
| 5410 | Research Staff | 315,549.00 | 25,268.55 | 13,720.00 | 109,023.25 | 290,280.25 | 0.2 |
| 5423 | Summer Salaries | 73,228.00 | 0 | 0 | 5,400.00 | 57,466.23 | 15,761.77 |
| 5800 | Rel. Time Salary - Faculty & Staff | 13,665.00 | 0 | 0 | 0 | 4,951.95 | 8,713.05 |
| | SubTotal Salary | 402,442.00 | 25,268.55 | 13,720.00 | 128,088.63 | 366,363.81 | 10,809.64 |
| 5920 | F/B Expense Full Time @ 35.0% | 110,442.15 | 3,419.11 | 4,802.00 | 38,158.14 | 96,630.54 | 10,392.50 |
| 5940 | F/B Expense Part Time B @ 8.0% | 0 | 5,424.88 | 0 | 1,093.23 | 2,228.67 | -7,653.55 |
| 5950 | F/B Expense Released Time @ 49.40% | 6,750.51 | 0 | 0 | 0 | 2,560.16 | 4,190.35 |
| 5955 | F/B Expense Summer Salary @ 24.9% | 18,233.77 | 0 | 0 | 1,344.60 | 14,152.89 | 4,080.88 |
| 5999 | MTA Payroll Tax | 1,892.27 | 151.61 | 82.32 | 736.11 | 1,736.49 | 4.17 |
| | SubTotal Fringe Bnft and Payroll Costs | 137,318.70 | 8,995.60 | 4,884.32 | 41,332.08 | 117,308.75 | 11,014.35 |
| | Total Personnel Cost | 539,760.70 | 34,264.15 | 18,604.32 | 169,420.71 | 483,672.56 | 21,823.99 |
| 6200 | Office Supplies General | 0 | 0 | 0 | 164.45 | 164.45 | -164.45 |
| 6210 | Instructional Supplies | 0 | 0 | 0 | 38.37 | 38.37 | -38.37 |
| 6240 | Textbooks | 0 | 0 | 0 | 0 | 504 | -504 |
| 6260 | Food Supplies | 61,050.00 | 0 | 2,412.86 | 22,455.11 | 57,922.97 | 3,127.03 |
| 6400 | Communications - General | 0 | 0 | 0 | 0 | 0 | 0 |
| 6700 | Space Rental | 20,700.00 | 0 | 10,800.00 | 10,800.00 | 20,700.00 | 0 |
| 6800 | Printing and reproduction | 0 | 0 | 175.64 | 387.77 | 435.77 | -435.77 |
| 6900 | Travel | 411 | 0 | 0 | 411.2 | 411.2 | -0.2 |
| 7000 | Consultants | 157,900.00 | 0 | 8,300.00 | 61,324.65 | 164,928.56 | -7,028.56 |
| 7001 | Consultant Travel | 0 | 0 | 0 | 336.95 | 336.95 | -336.95 |
| 7300 | Memberships | 0 | 0 | 0 | 1,030.38 | 1,579.64 | -1,579.64 |
| 7400 | Conference & Seminar Expense | 0 | 0 | 311.85 | 311.85 | 461.6 | -461.6 |
| 7401 | Cultural Activities & Special Events | 4,807.00 | 0 | 0 | 4,384.50 | 4,806.36 | 0.64 |
| 7410 | Meetings | 0 | 0 | 0 | 65.55 | 414.91 | -414.91 |
| 7921 | Non Cap. Computer Hardware < \$5,000 | 1,119.00 | 0 | 0 | 0 | 1,119.00 | 0 |
| 8230 | Advance - Vendors | 0 | 0 | -10,800.00 | 0 | 0 | 0 |
| 8260 | Advance-P Cardholder No.1 | 0 | 5,000.00 | 0 | 0 | 0 | -5,000.00 |
| 8800 | Other Direct Cost-Unclass Bdgt Expense | 8,834.00 | 0 | 0 | 0 | 0 | 8,834.00 |
| | Total OTPS | 254,821.00 | 5,000.00 | 11,200.35 | 101,710.78 | 253,823.78 | -4,002.78 |
| | Total Direct Cost | 794,581.70 | 39,264.15 | 29,804.67 | 271,131.49 | 737,496.34 | 17,821.21 |
| 9000 | Facilities & Administrative Costs | 79,458.00 | 0 | 2,980.48 | 27,113.21 | 73,749.72 | 5,708.28 |
| | Total F&A Cost | 79,458.00 | 0 | 2,980.48 | 27,113.21 | 73,749.72 | 5,708.28 |
| | Total | 874,039.70 | 39,264.15 | 32,785.15 | 298,244.70 | 811,246.06 | 23,529.49 |

F&A Cost Rate for this Project is 10.00%.

Leadership Fellows New York 2023-2025 Fiscal Accounting Justification

The following document is intended as a plain-text version of the preceding Project Budget & Expense Spreadsheet, which serves as our fiscal accounting report. These amounts typically reflect PTD activity plus remaining encumbrance, whenever available.

Please note that the Project Budget & Expense Spreadsheet is automatically generated by the RFCUNY system, and reflects total costs for the program through 2025. For the purposes of this final report, we have listed all the numbers below on the full 2-year basis, reflecting the total grant amount of \$874,039.70 (\$870,000.00 from the New York Community Trust for 2023-2025 and \$4,039.70 in rollover from previous years).

Personnel

Director - Michael Seltzer - \$52,218.18

Michael Seltzer oversaw all aspects of the Leadership Fellows New York program before his retirement in October 2024. This allocation reflects 2024 reassigned time (\$4,951.95) payable to the college plus 2023 summer salary (\$47,266.23) for Mr. Seltzer. Mr. Seltzer was not paid for 2024 work related to the program due to his hospitalization and subsequent retirement.

Interim Director – Karen Ford - \$13,665.38

Karen Ford was briefly hired from July to August 2024 as a potential successor to Michael Seltzer on the project; however, since CUNY policy is that the PI for the project must be a CUNY professor, Ms. Ford agreed to leave the program.

Administrative Director – Shel Ho - \$176,416.80

Shel Ho oversees various aspects of the New York Community Trust Leadership Fellows program including but not limited to finance, curriculum innovations, recruitment, special events, faculty scheduling, communications with program staff, acting as a liaison for the Fellows and other responsibilities. Shel Ho was hired on a part-time basis in 2023 and a full-time basis in 2024.

Communications Officer – Jenée Gerald - \$139,132.00

Jenée Gerald serves as the Communications and Knowledge Management Officer of the New York Community Trust Leadership Fellows. She handles critical day-to-day communications for the program, including communications with the fellows, faculty, and mentors, social media updates, and updates to our Knowledge Hub and Knowledge Mailing. Ms. Gerald was hired on a part-time basis in 2023 and a full-time basis in 2024.

Instructor – Dr. Don Waisanen - \$10,200.00

Dr. Waisanen is the communications faculty member for the Fellowship. He teaches two sessions on effective nonprofit communication strategy. As he is a Baruch College faculty member, his remuneration is listed under summer salary, and he counts as personnel. All of our other instructors are paid as external consultants and are listed under OTPS. This total amount reflects \$4,800 for his 2023 summer salary and \$5,400 for his 2024 summer salary, which reflects his instructional and mentoring fees.

Fringe Benefits - \$124,416.25

Fringe benefits of \$124,416.25 are calculated on all personnel. There is a pending issue where \$5,242.88 of part-time fringe appears to still be encumbered for Shel Ho from 2023 although the employee in question has now been moved to full-time employment; if this can be resolved, \$5,242.88 may be returned to the grant for rollover in 2025.

MTA Payroll Tax - \$1,888.10

MTA payroll tax for both 2023 and 2024

Total Personnel Costs: \$517,936.71

Total personnel costs for both 2023 and 2024.

Other than Personnel Expenses (OTPS)**Office Supplies General - \$164.45**

Office supplies for the fellowship.

Instructional Supplies - \$38.37

Instructional supplies for the fellowship.

Textbooks - \$504.00

Books purchased for the Fall 2023 graduation.

Food Supplies - \$60,335.83

Food supplies for the fellowship. Catering costs include breakfast and lunch for all of our sessions. Some additional food payments are still pending in the “Pending Payments” section below.

Space Rental - \$20,700.00

Space rental fee for the FPWA conference space. This reflects a charge of \$9,900 for Spring 2023 and \$10,800 for Fall 2024. Rental expenses for Fall 2023 and Spring 2024 were offloaded onto other grants secured by the program at that time.

Printing - \$435.77

Printing costs for certificates, business cards, and other materials used by the fellowship.

Consultants - \$164,928.56

\$164,928.56 of Trust grant funds were used to pay consultants. This is a classification that includes instructors and mentors for the program. Some mentor and instructor costs were offloaded onto other grants secured by the program in 2023.

Consultants – Instructors - \$19,200.00 (S2023) + \$25,400.00 (F2023)

The instructors under this category teach our weekly sessions. They are responsible for adhering to our program's values and teaching to our curriculum. They are compensated at \$400 per hour of instruction.

Our instructors change from year to year based on the needs and interests of our Fellows. The list of instructors we hired this year are as follows:

- Daonese Johnson-Colón, Organizational Culture
- Edith Asibey, Social Media Strategies
- Jamie Lonie, Social Media Strategies
- Hiershenee Luesse, Monitoring and Evaluation
- Joe Luesse, Monitoring and Evaluation
- Kary Perez, Audience Growth
- Marvin Vilma, Fundraising and Resource Mobilization
- Melissa Shillingford, Organizational Culture
- Odell Mays, Finance and Budgeting
- Richard Rivera, Courageous Conversations
- Lakimja Mattocks, Courageous Conversations

Consultants – Mentors - \$29,000.00 (S2023) + \$34,000.00 (F2023)

Each Fellow who participates in the Fellowship will receive a mentor who will work with them on their change project at their organization. Each mentor is paid \$1,000 for each Fellow mentored.

Consultants – Great Believer Communications Firm**\$12,500.00 (2023) + \$12,933.00 (2024)**

Great Believer, a Brooklyn-based communications firm, serves as our chief communications consultants. Great Believer provides ongoing support with our website, the Knowledge Hub, all of our digital collateral, and management of our

website and email servers. Great Believer also manages our branding and website development. This allocation reflects retainer costs for 2023 and 2024.

Consultant Travel - \$336.95

Travel expenses for one of our instructors in Fall 2024.

Memberships - \$1,579.64

Membership expenses for LFNY. This primarily reflects Mailchimp membership costs for 2023 and 2024, which facilitate sending mass emails to promote the fellowship. An additional \$150 was paid to Independent Sector for membership.

Conference and Seminar Expense - \$461.60

This is a classification used by RFCUNY for graduation expenses.

Cultural Activities and Special Events - \$4,806.36

This is another classification used by RFCUNY for graduation expenses.

Meetings - \$414.91

Reflects food costs for meetings among LFNY staff.

Non Cap. Computer Hardware <\$5,000 - \$1,119.00

An emergency laptop expense for LFNY employee Jenée Gerald. This was made possible using the \$4,039.70 in rollover funds from previous years.

Advance-P Cardholder No.1 - \$5,000.00

This reflects funds transferred to the program's purchasing card, which can be used whenever it is impractical to charge the program via vendor invoicing (e.g. food or supply expenses which generally only accept credit cards). These funds are currently unspent or pending in the "Pending Payments" section below.

Total OTPS: \$258,823.78

Total Direct Cost: \$776,760.49

Facilities and Administrative Cost - \$79,458.00

Reflects costs incurred by RFCUNY in order to manage this grant.

Pending Payments

As of February 21, 2025 - the writing of this fiscal accounting - a total of \$17,821.21 is still available on this grant. An additional \$5,000.00 is available on a new purchasing

card which was set up for PI Don Waisanen. We intend to have spent the entirety of the grant by March 31, 2025, our formal end date. Our pending/projected payments are as follows:

- \$9,439.50 in payments to Hidden City for catering, including the graduation catering
- \$667.10 in reimbursements to Shel Ho, Jenée Gerald, and Fall 2024 fellow Gineyda Diaz for purchasing materials related to the graduation
- \$2,500.00 in service fees for Great Believer, which will undertake a minor website reskin to accommodate a rename to “Leadership Fellows at the Trust”
- \$5,500.00 in pending mentor payments for the Fall 2024 cohort
- \$1,860.00 in payments to Daisy Dukes restaurant for hosting the graduation afterparty (this will be charged to the purchasing card)

The unused balance on the purchasing card may be returned to the grant or held for reuse on next year’s grant as needed.

Total Costs - \$874,039.70