



**Fund the  
People Toolkit**

Field Stories

**The New York Community Trust**





# The New York Community Trust

[nycommunitytrust.org](http://nycommunitytrust.org)

## At a Glance



<b>Type:</b>	Community Foundation
<b>Service Area:</b>	New York City, Westchester and Long Island
<b>Assets:</b>	\$2.55 billion
<b>Founded:</b>	1924
<b>Recent Talent Investments:</b>	The New York Community Trust Leadership Fellows program

In 2014, during their annual retreat, The New York Community Trust's program staff all realized that they shared a common observation about their grantees and the broader pool of grant applicants — there weren't enough leaders of color.

That reality didn't reflect the diversity of New York, and it certainly didn't reflect the values of The Trust. "The issue of diversity led us to step up our presence in the leadership development space," says Senior Program Officer Patricia Swann, who led The Trust's effort to create The New York Community Trust Leadership Fellows program at Baruch College.

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The Leadership Fellows program focuses on providing an in-depth experience specifically for mid-career professionals, as opposed to senior leaders or "101"-type workshops. "We found there were a lot of resources for executive directors and CEOs, and a lot for rookies, but not much targeted specifically to people who had been in the field a few years and were supervising others and assuming responsibility for outcomes," says Swann.

The Trust had a history of supporting area capacity-building efforts that included leadership development components, but designing a leadership program from scratch was a new frontier. Swann and her staff convened focus groups of CEOs of nonprofit intermediary organizations to learn what they thought was missing in terms of leadership and professional development for outstanding staff members.

"Through our conversations, we learned that top-level leaders wanted their promising staff to have a holistic



understanding of operations, from fund-raising and budget planning to communications and governance,” says Swann. “In addition to classroom courses, supports like mentoring and coaching would be especially valuable. We also learned that providing an opportunity for participants to apply their learning in real time within their organizations would be an added benefit.”

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## The Perfect Partner

**“Faculty is key. At the core are people who know how to teach adults. They are strong, diverse, and very professionally oriented and grounded in actual practice, not just theory.”**

Its history and reputation made Baruch an obvious choice. The College had more than a decade of experience running successful certificate programs for and with nonprofits and public agencies. It also had the largest footprint in the city for providing these programs, and it could offer a transition to a master’s degree program in public affairs, with a nonprofit concentration, for those who wished to extend their learning. Fellows learn from Baruch faculty and other subject-matter experts. The focus is on a participatory pedagogy.

Swann and The Trust realized that they’d need a strong partner to launch the kind of experience they envisioned, so they turned to the Austin W. Marxe School of Public and International Affairs at Baruch College of the City University of New York to co-design and deliver the Leadership Fellows program.

“The faculty is key,” says Swann. “The program follows an academic model, and at the core are people who know how to teach adults. They are strong, diverse, and very professionally oriented and grounded in actual practice, not just theory.”

## Building the Program

The Leadership Fellows program is limited to 30 participants each cohort and is open to staff of The Trust’s current and recent grantees, representing roughly 600–700 organizations at any time. This makes for a competitive universe, so The Trust and Baruch made two important decisions about application and selection criteria.

First, although the primary intent of the Leadership Fellows program is to prepare leaders of color, it is marketed as an opportunity for all. “Neither The Trust nor Baruch wanted to market an exclusive program,” Swann explains. However, the program does make an active effort to recruit diverse participants.



Second, they decided that nominations for program participants should come from CEOs or executive directors, so that they would think about which people on their staff would benefit most. Having CEOs nominate also clarifies their commitment and support for staff who must take time away from work to attend program sessions.

The curriculum for the 12-week program includes weekly class sessions that cover a wide range of topics, such as social/emotional intelligence, social media, financial management, resource mobilization, leadership, strategic planning and cultural competency. In addition, fellows attend four Dean's Dinners with "movers and shakers" in the nonprofit field and with local and state government leaders, all of whom can lead big-picture discussions. At the end of the program, fellows receive an executive certificate.

"We intentionally built in opportunities for fellows to expand their relationship capital, learn about leadership and management from key leaders, and expand their knowledge of the sector overall," says Michael Seltzer, Distinguished Lecturer and Leadership Fellows program director at Baruch.

In addition to classroom sessions and Dean's Dinners, each fellow selects a "change project" that allows them to apply what they're learning to their own organizations in real time. "We ask them to put forth a project that will extend their skills and that their CEO deems a front-burner issue," says Seltzer. "That's the spine of the fellowship experience. It can change and alter as they learn more and work with their mentors. They must design the project, and in many cases they will be able to start implementing it as well during the course of the fellowship."

He notes that a number of change projects are about accelerating cultural inclusivity within the fellows' organizations — which ultimately will help further The Trust's goal of growing leadership diversity.

Each fellow chooses a mentor — either one they request or one matched to their interests. The program intentionally creates a mentor pool that reflects the diversity of the city. Mentors support the fellows in pursuit of their change projects, and they also serve as sounding boards and coaches during (and often after) the program to help the fellows become more effective change agents.

"Everything has evolved as we've moved forward — from curriculum to how change projects work to how we select and view the role of mentors," says Seltzer. "We agreed to learn as we go, so we're constantly looking at how to retool."

Since the program began in 2015, four cohorts have produced 113 graduates. Two of the graduates have gone on to enroll in Baruch's master's degree program in public administration.

In addition, Seltzer notes one unanticipated benefit. "Because of the large size and scope of the metropolitan New York City nonprofit community, organizations tend to be siloed according to their subsectors. This is one of the few meeting grounds where representatives from arts and culture, youth development, environmental, human services, community development, and other fields interact with each other. We're also seeing new, creative, cross-sector partnerships arise between organizations within each cohort."



## Internal Investment

After a \$10,000 planning grant, The Trust has invested approximately \$450,000 per year into the Leadership Fellows program. The investment has been significant, not only in terms of size but also as a signal to the field.

“The Trust’s grant to support the Leadership Fellows is one of the largest made by a New York foundation for leadership development,” says Seltzer. “It says that we understand the ongoing growth of diversity within the nonprofit sector, and we need to seize every educational opportunity we have to ensure diverse leaders have the skills, tools, and knowledge they need to create a better city, region, and nation.”

In addition, The Trust is investing in an assessment of the program to determine its impact and provide ongoing data on its effectiveness.

From a staff time perspective, Swann estimates that about 15 percent of her time is dedicated to the program. The grant funding to Baruch covers the cost of a full-time associate director and part of Seltzer’s time. Seltzer also leverages contributions of time from others on Baruch’s faculty and staff, including a graduate student and volunteers, Dean David S. Birdsell (who hosts the Dean’s Dinners), college financial staff, and other funders who serve on the nomination review committee.

The program has benefited from the wisdom and contributions of Maria Mottola, Executive Director of the New York Foundation, and Deborah Velazquez, Associate Director at the Altman Foundation, both of whom served on the selection committee in 2016. In addition, Ingrid Benedict, Director of the Daphne Foundation served as a mentor in two cohorts.

## Quick Case 1

### Tactical and Practical

Sharese Bullock-Bailey is a devoted leadership development fan. “Leadership in the social sector has always been a priority for me, so I’ve always been aware and engaged in fine-tuning and investing in myself through leadership development programs. I’ve been part of many,” she says.

But none has offered the tactical and practical experience of The New York Community Trust Leadership

Fellows program. “The Fellows program provided nuts-and-bolts information about leading an organization, leading a team, and being action oriented. It’s about looking at strengths within yourself and others in your organization. You also cover key components of social sector leadership — the mission, vision, values, faculty time, mentor stipends, meeting expenses (space, food, etc), communications/website consultants, and miscellaneous expenses.



**“The fellowship provided layers of tools and strategies that I’m bringing to my team. I feel like I have a basket of resources I can dig into at any time.”**

And it provided layers and layers of tools and strategies that I’m bringing to my team. I feel like I have a basket of resources I can dig into at any time. ”

As the director of Tribeca Teaches, an education program of the Tribeca Film Institute, Bullock-Bailey chose to create an impact assessment of the Institute’s programs for her Leadership Fellows program change project. She worked with two programs to design and pilot two different approaches during her spring 2016 term as a fellow, and she plans to deploy a redesigned assessment tool for all programming in 2016–17.

“For everyone in our institution, better assessment is a priority, and I’ve been able to offer one example of how that might be achieved. Being a fellow gave me a clear platform to talk about what I was doing and share it with other teams at Tribeca,” she says.

Bullock-Bailey particularly found value in the diversity within her own cohort. “It’s easy to get caught in your own silo. I loved that we were from all around New York City and not all in the same field. There were people from health care, housing, education, community development, the arts, and more. It really gave me a sense of how all these organizations come together. Seeing all the great work others are doing gave me a new perspective about whom I can partner with and learn from. I also learned directly from other cohort members about things that are specifically applicable to my own leadership right now.”

The “tactical and practical” skills that Bullock-Bailey attained as a Leadership Fellow have provided her with another key benefit: more confidence. “Understanding the value of my own leadership has helped me step forward and be more proactive about finding solutions,” she says. “Now I share what I learn and think with my supervisor, and know I’m coming from an authentic place.”

## Quick Case 2

### A Mentor’s Perspective

Brian Newman was honored when Sharese Bullock-Bailey asked him to be her mentor for The New York Community Trust Leadership Fellows program. He wasn’t surprised, because he’d known Bullock-Bailey for years and had actually recommended that she apply to the program. But he didn’t anticipate that he’d get just as much as she did from the experience.

After Newman completed the Leadership Fellows program’s vetting and orientation process, the two met for coffee several times during the program, talking for an hour or more about Bullock-Bailey’s ideas for better assessing the impact of the programs at the Tribeca Film Institute. As a former Tribeca executive director, Newman, now a business development consultant, also shared his insights on dealing with the culture and politics that can surround leadership in the nonprofit world.



“We talked about her ideas for ways to have an impact on structural issues in the film world around diversity and financing for diverse filmmakers. She’s thinking about new ways to approach it, with new partners. It’s exciting.”

Newman also provided Bullock-Bailey with something just as valuable as advice: his contacts. For rising leaders, making connections is just as important as building skills, and mentoring relationships in the Leadership Fellows program are expected to do both.

“He’s been a great mentor, because he has historic knowledge about our organization and he brings a focus on data and technical knowledge that’s great to have,” says Bullock-Bailey. “I could have safe conversations with him and talk about different approaches without it being too risky. He helped me understand when to push and pull around new ideas and opportunities and how I might stretch and grow beyond the fellowship.”

Mentoring is important, says Newman, because the future leaders of the nonprofit sector face more challenges than many of their predecessors. “In talking with Sharese, I learned that there’s less upward mobility for nonprofit staff than there used to be. I was able to become an executive director at 28, but I don’t see that happening as much any more. People are staying in place longer, and there’s a trend toward wanting more experience for leadership roles rather than being willing to take a chance. Young people with exciting ideas who really want to contribute probably aren’t being used enough, or given enough challenges.”

Newman took his own lesson to heart from the experience. “I want to do more mentorship,” he says. “I’ve been mentored by others who were more senior than I and it’s always been extremely helpful. I’ve done a lot of informal mentoring here and there, but this experience inspired me to be more intentional about that.”

## Lessons Learned

### 1

#### **Integrating individual projects into a 12-week curriculum can be tricky**

For the first Leadership Fellows cohort, The Trust built in a five week break during the regular weekly class schedule, during which participants were meant to work intensively on their change projects. Class feedback revealed that this timing didn’t always align with participants’ own implementation timetables for their projects. For the second cohort the break was eliminated, but program staff are still working to figure out the best way to integrate highly individualized projects more closely with the overall class curriculum.

### 2

#### **Creating an inclusive program requires a great degree of intentionality**

The Trust and Baruch chose not to market the Leadership Fellows program as one only for leaders of color. But in the absence of that designation, says Swann, they have found that the proactive outreach required to build a diverse cohort is challenging — both in terms of time and of the contacts and networks necessary for The Trust and the College to maintain.



3

### Constantly revisit curriculum and pedagogy

Seltzer constantly questions how Baruch can tweak or enhance the program. He pushes for more sharing of lessons among organizations and new ways to turn classrooms into participatory learning communities. He also looks for ways to ensure they are incorporating twenty-first-century adult education methods into teaching, using approaches such as social media, group work, infographics, and other tools.

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### Understand staffing demands

Those offering a leadership program must understand the demands and constraints of their staffing structure. For Baruch, there's always more that could be done, and Seltzer admits they could have been more realistic in their initial projections of staff time required. To help address the need, he's made use of graduate students and volunteers when possible.

## Looking Ahead

### Surveying Fellowship Alumni

Seltzer is excited about the ongoing prospects for continually improving and refining the Leadership Fellows experience, and also about building a cadre of active alumni.

“The idea of peer learning groups is exciting, because we've seen them be very successful, but mostly for those at the executive director level,” he says. “We'll have a chance to apply best practices in peer learning for mid-level leaders.”

### Future of Leadership Fellows Program

Although it's still early, Swann is already considering the future of the Leadership Fellows program. “As a community foundation, we don't have the luxury of parking our money with any one organization for a very long time,” she says. She plans to use upcoming assessment results to help identify not only what's working well and what could be improved but also which elements are most critical to fund should The Trust need to step down its support.

“We're also looking at ways to market different and new components of this program to other funders,” she adds.





# The New York Community Trust Leadership Fellows Program

Target participants	Mid-level managers with at least five years' experience
Number of participants per year	30 maximum per cohort; cohorts run spring and fall each year
Content partner	Austin W. Marxe School of Public and International Affairs Center for Nonprofit Strategy and Management Office of Executive Programs
Topics covered	Curriculum evolves and has included resource mobilization, financial management and planning, communications, social media, social/emotional intelligence, leading diversity, management, and governance
Time commitment	Once-a-week, daylong classroom sessions over a 12-week period, mentor meetings as desired, time spent on change projects outside of class, weekly readings, and monthly Dean's Dinners
Annual program cost	Approximately \$450,000
Year started	2015



## About Fund the People



Fund the People is the national campaign to maximize investment in the nonprofit workforce. To achieve this goal, we make the case, equip for action, and build a movement to change the attitudes and behaviors of funders, fundraising nonprofits, and the intermediaries that support them. There is a long-standing, sector-wide deficit of investment in the nonprofit workforce. Nonprofit professionals work in environments typified by high burnout and stretched resources. So there is a real demand for equitable salaries and benefits, more and better professional development, improved

human resources functions, and healthy organizational culture. Together, we can address these challenges by reshaping existing resources to prioritize nonprofit people as the central asset of nonprofit performance. Now more than ever, we can ensure that America's civic leadership is diverse, well-supported, high-performing, and sustainable for the long haul. Launched in 2014 and headquartered in Beacon, NY, Fund the People (originally known as Talent Philanthropy Project) is a project of Community Partners. Our work is informed by an Advisory Council of diverse leaders and a team of skilled staff and consultants, and is supported by a coalition of regional and national foundations.

To learn more about Fund the People visit: [fundthepeople.org](http://fundthepeople.org)

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