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2024

# NonProfit HelpDesk Final Report

## June 30, 2024

The NonProfit HelpDesk, a division of Jewish Community Council of Greater Coney Island, 3001 West 37th Street, Brooklyn, NY | 224 718-449-5000

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FY 2024 was a productive year for the NonProfit HelpDesk (NPHD). Program offerings included virtual workshops, office hours, project support, and executive coaching to nonprofits and emerging organizations. More than 3,000 individuals benefited from our services. Sixty-One organizations from across New York City took advantage of office hours and consultative support. Our 12-month cycle began with a planning process in the late summer, leading to workshops in the fall and one-on-one consultations and project support as an outgrowth of the workshops. Workshops also were offered in the winter and spring. We updated the masthead on our website, and kept the page up-to-date with copies of this year's workshop slide decks and recordings. Also, we added a sign-up form to capture additional email addresses and a form to request a consultation.

A great team of facilitators is in place, we expanded our offerings, and Jeri Mendelsohn's work on the Discretionary Funds process has positioned us favorably with many Council Members. CM Susan Zhuang's office is interested in working more closely with us to offer workshops in Chinese and other languages. Her office has awarded NPHD a \$12,500 Discretionary Fund grant for FY2025, with some of that funding intended for translation services based on a conversation with her staff in June. We continued to benefit from pro bono consulting, and we are building a relationship with the Brooklyn Community Foundation<sup>1</sup> and the [New York City Capacity Building Collaborative](#). The NYC Department of Citywide Administrative Services (DCAS) has added two NPHD facilitators to their roster of trainers (Boris Kievsky and Rosemary Ostmann), and the workshops they will provide will generate additional income for JCCGCI.

The NPHD team included:

1. Lara Cohn (Communications and Media Relations)
2. Amy Fiore (Fund Development and Governance)
3. Eric Graig (Data and Program Evaluation)
4. Inna Karalitskiy (Office Manager Executive)
5. Boris Kievsky (Websites and Social Media)
6. Jeri Mendelsohn (Discretionary Funds, Grant Writing)
7. Jill Mendelson (NPHD Director)
8. Rosemary Ostmann (Communications and Media Relations)
9. Linda Rich (Management and Leadership)
10. Yisroel Schulman (Legal)

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<sup>1</sup> See appendix for a proposal submitted to the Brooklyn Community Foundation (BrooklynOrg)

What follows is a summary representing the organizational development capacity building provided by the NPHD team. In addition, a session on strategic planning was presented pro bono by the principals of Plan A Advisors, a boutique consulting firm serving the nonprofit and philanthropic sectors.

Workshops and office hours that addressed the NYC Discretionary Funds program and capital funding were provided by NPHD specialist Jeri Mendelsohn, whose work largely took place between November 2023 - February 2024. A detailed report prepared by Jeri is in the appendix.<sup>2</sup>

### Workshops

We offered thirty-two online sessions in the fall/winter and spring. Staff specialists identified workshop topics that would offer value to our target audiences, early-stage organizations and those with limited budgets and resources. We continued to offer multiple sessions on evergreen topics and once again invited participants to *'Shark-Tank Style'* sessions that involved volunteer organizations presenting their *story* to the audience, with real time feedback from NPHD presenters. Most of the workshops offered follow-on *office hours* to interested participants, who registered for a consultation using a Google form<sup>3</sup>. A new, 3-part series on websites was introduced this year, and this series had the most requests for one-on-one consultations. We offered a new, 2-part series on the art and science of grant writing that addressed foundation research, writing an effective proposal, and other topics. These sessions were very well attended. We expanded our portfolio of workshops for nonprofits interested in applying for government funding and included a session on Capital Funding.

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<sup>2</sup> See the Appendix for a detailed report on the Discretionary Funding program.

<sup>3</sup> See the Appendix for a list of workshop topics.

## Case Vignette

### Funder Readiness

This year, NPHD focused on funder readiness as a theme for its work in fundraising. In December, a webinar on that topic explored what funders look at when considering a grant to an organization, and the type of information that is frequently requested by grant makers. The follow-up consulting illustrated that these were not necessarily difficult to procure but required a different way of thinking.

For example, **Training for Life** sought help with their general funder language and provided a mission and history document that spent the first three paragraphs describing the inspiration for the mission, which, while inspiring, was relatively unrelated. As a result, a reader unfamiliar with the work would struggle to understand the fundamental purpose of the organization and likely not fund it. NPHD helped them to rearrange the wording they provided to be mission and vision forward, advice no one had ever given them before.

Similarly, the **Childcare Hub** had grand ideas of myriad ways they could support their community and attempted to outline all of them in a business plan that was more akin to a corporation. NPHD helped them to streamline their focus and language so they could build a case for their fundability. This included drafting a new LOI for potential funders and providing detailed feedback on a grant proposal to shed light on how an outsider was absorbing their content.

Over the space of 1-2 hours with these nonprofits, NPHD was able to quickly assess their challenges and provide meaningful advice that changed their probability for grants.

Registration was robust for the sessions, with more than 4,000 sign-ups. 2,037 people attended a session, with average attendance at 54. Eventbrite was used to market the series and a number of mailing lists were used including the NPHD list and the JCCGCI list that is frequently updated by Rabbi Wiener. We circulated our schedule to several Council Members and asked for their help in promoting sessions. NPHD workshops were listed on the Brooklyn Community Foundation's website. One session was co-sponsored with The Brooklyn Community Foundation, which is expanding its in-house capacity building support to its grantees. All new workshop participants were added to the NPHD mailing list.

## Case Vignette

### Discretionary Funds Workshops

For many small, relatively young nonprofit organizations, NYC Council Discretionary funding constitutes a first foray into the world of government funding and is an important step in building agency capacity. In addition to the 915 participants in our 16 Workshops, the 2024 NonProfit Help Desk provided individual consultations to 29 different organizations, helping the dedicated efforts of various civic organizations and offering application assistance to agencies that provide scholarship assistance, afterschool programs, and even animal rescues. NPHD supported the efforts of innovative driving schools, athletic leagues, food pantries, and agencies helping new immigrants resettle in New York City.

Representatives of organizations received instruction and encouragement as they proceeded through the labyrinth of processes, procedures, forms, and follow-up calls that are necessary steps in achieving Discretionary funding. With help from NPHD, agencies successfully applied for, and many were awarded, targeted funding from NYC Council Members that help address local needs and provide a lifeline of support to local nonprofits and their participants.

### Consulting

We began to provide these one-on-one services in the winter following the fall series of workshops. A limited number of nonprofits benefited from substantial project support, and many others received short consultations of 1 - 2 hours.<sup>4</sup> Requests were received as an outgrowth of the workshops, through our website and by referral from Council Members and former NPHD clients. In total, NPHD worked with 60 different organizations.

For the bigger projects, staff specialists developed a Statement of Work document that represented the scope, goals, deliverables, anticipated consulting hours, and timetable for their projects. Both the staff professional and the client nonprofit signed-off on those documents. Office hour assignments did not include an SOW, but staff provided short summaries to have on record. The staff professionals worked independently, with periodic oversight largely provided by NPHD Director Jill Mendelson. This was done intentionally, as all the professionals are seasoned

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<sup>4</sup> See appendix for listing of organizations benefiting from office hours and for individual Statements of Work (SOW) for each in-depth project.

and experienced in working with nonprofits in a consulting capacity and our goal was to maximize time with and on behalf of client nonprofits.

Facilitators were encouraged to respond to client needs that would make a meaningful difference to an organization. In some cases, this meant doing the work in addition to developing organizational skills. As one example, MORE Opera benefited from fund development help last year. This year, the director competed successfully for a grant to support its artistic mission and wanted to communicate this funding to its various stakeholders. NPHD wrote and distributed a press release and the [grant announcement was covered in Opera Wire](#), an important outlet to the nonprofit. A number of clients from 2023 continued to reach out to NPHD as additional questions and needs developed.

### **Case Vignette**

#### **The Koenig Childhood Cancer Foundation**

The NonProfit HelpDesk engaged with the Koenig Childhood Cancer Foundation to raise the organization's visibility through media exposure. One of the organization's co-founders, Rena Koenig, attended a workshop on how to pitch a story to the media. During the Q&A portion, she asked if she could share her story to see if the facilitator thought it had the potential for national coverage. The facilitator was immediately taken with the emotional journey of childhood cancer survival that led to the creation of the foundation and offered to help her explore the possibilities with one-on-one consulting.

The first step was a meeting to understand the organization's objectives as well as the full story of its founder, 15-year-old Elana Koenig, who was diagnosed with cancer at seven years old. After an 18-month battle that included 15 surgeries and 9 rounds of chemotherapy, she decided to start a nonprofit to help other children who do not live in New York City get access to the same life-saving care she received. To date, she has raised nearly \$2 million and helped hundreds of families.

Through the NonProfit HelpDesk's efforts, profiles were garnered in [People](#) magazine and [The Kelly Clarkson Show](#). These stories in top-tier outlets created widespread awareness and brought third-party credibility and several new influential donors to the Foundation. Social media posts about the coverage and links from the website have extended the reach and will benefit the organization for years to come.

## Changes and New Relationships

The NPHD team is highly motivated and interested in maintaining a relationship with the program in FY 2025. Team members were identified by NPHD Director Jill Mendelson based on her in depth knowledge of the capacity-building field in NYC and her prior experience as a senior professional in UJA Federation of New York. Some facilitators have been with NPHD for several years now, while others were newly introduced in FY 2024. In the end, decisions regarding staffing should be made based on the topics that are being planned for the coming year, the types of services that will be provided, and other factors such as the diversity of the team, specific expertise of individual members, etc.

Due to the nature of funding for NPHD, team members are assigned a bucket of hours to use over the course of the year. Most of the funding is intended to support the delivery of capacity building, not the administrative work that is a necessary component of running the program. A lot of the administrative burden is carried by Inna Karalitskiy, administrator, while higher level tasks are managed by the NPHD Director. The exception to this has largely been with Jeri Mendelsohn on the Discretionary Funds process. The effort to reach out to NYC Council Members and coordinate with their offices takes a lot of time that could be spent working with nonprofits. Jeri has indicated that she is no longer willing to do this administrative work. Another approach will need to be found if Jeri is to continue with NPHD.

It should be noted that the position of NPHD director will be changing in FY 2025, as Jill steps down after almost 4 years with the program. In concluding her responsibilities, Jill wrote a job description for an incoming Director that should support the recruitment process.<sup>5</sup> Likewise, it might be helpful to prepare a job description for the Discretionary Funds position.

As new relationships continue to be nurtured, one worth noting is with the Brooklyn Community Foundation, known as Brooklyn Org. NPHD was retained to deliver several workshops to Brooklyn-based nonprofits with support from the Foundation.<sup>6</sup> The new NPHD Director will be responsible for investing in that relationship and developing it further. With new NYC Council Members in position, NPHD should continue to reach out and offer its services to these local leaders that represent different communities throughout the city. CM Susan Zhuang's office has asked

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<sup>5</sup> A job description for the NPHD Director is in the Appendix

<sup>6</sup> The NPHD grant request for workshop presentations is in the Appendix

NPHD to offer workshops in FY 2025 that can be presented in Chinese and other languages.

In evaluating this year's program, some key take-aways include the following:

- The quandary for NPHD is how to best utilize its budget in supporting its capacity-building mission. Do we concentrate on training through workshops, which will serve more organizations, or do we focus on consulting, which will provide more in depth support to a smaller number of organizations? Ideally, if time and resources allow, we can develop cohorts of organizations and provide a deeper set of services. As one example, for those groups wanting to obtain their 501(c)(3) status, we could also include foundational organizational development in such areas as board building, planning, and financial management.
- Workshop registration was robust, and attendance this year exceeded last year's numbers. New strategies should be employed to attract even greater participation.
- More efforts might be directed to social media in order to promote NPHD. One of the facilitators with expertise in this area could be tapped to provide this support in addition to delivering workshops and consultations.
- Office hours in follow-up to workshops continues to be a good model. Not only does it provide immediate, targeted support, but also it helps to identify needs that might be met through a more in-depth consulting process. Through this window, we also learn about additional topics for workshops.
- We continued to promote executive coaching on our website page and scheduled workshops on leadership. One in-depth project evolved because of targeted outreach. Workshops attracted a smaller audience. This capacity building area needs to be evaluated to decide what changes to make and whether or not to include it next year.  
New approaches are worth considering, as coaching truly is a gift and when used well, can make a big difference in executive performance.
- Fund development continues to be an area of concentration. Our two-part workshop series on grant writing attracted the largest audience.
- We continued to get requests from emerging nonprofits for help in obtaining federal tax-exempt status and for governance questions. These important areas should continue next year.



- We extended our offerings through the generosity of two pro bono consultants, and we should continue to look for these opportunities in the future.
- Translation came up as an issue this year, and one of the Discretionary Funds workshops included a Chinese translator to help with the chat. As more grassroots organizations seek to raise funds and develop their organizations, we should see how to be more responsive.
- This year we continued to make our workshop presentations more interactive with polls and the chat exchange, and by inviting participants to unmute themselves to comment and ask questions. We should continue to experiment with this next year, and provide more resource materials and templates to accompany the presentations.
- One of the issues that will need to be addressed is the balance between virtual and on-site support. We remained virtual this year, and for many projects and for coaching this is working well. If more funding becomes available, we may want to change this model to include in-person workshops and on-site consultative support. One issue with this, of course, is that staff specialists will need to use their bucket of hours to cover travel time. All this needs to be factored in.
- Our new relationship with Brooklyn Community Foundation will need to be nurtured, and more efforts should be made to collaborate with Council Members beyond the presentation of Discretionary Funding workshops.

## Case Vignette

### Washington Heights Y

The director of programming at the Washington Heights Y had recently started in the role. He found that his directors were effective performers, but did not have formal leadership development training, which could unleash their potential for increased success. He reached out to NPHD to work with the group, to help individual managers increase their leadership effectiveness, while also continuing to build the team.

NPHD designed a simple assessment to survey the group about their perceived leadership development needs. Results indicated that the group was most interested in concrete, practical ways to work with their direct reports. NPHD started with a session of NPHD's "Coaching Skills for Managers" workshop, which was well received and seen as immediately applicable. The group was enthusiastic about trying the new skills with their direct reports.

The Coaching Skills workshop led the group to revisit their training needs as a team, and to think about leadership development in a deeper way. With the summer season looming, the focus moved to some very immediate needs, which NPHD helped to frame.

NPHD also reviewed a draft of proposed performance competencies for the group and provided valuable feedback that was incorporated into the instrument.

## Appendices

1. Listing of Staff Specialists
2. Report on the Discretionary Funding program
3. Client Services Summary FY 2024
4. Workshop Registration and Attendance
5. Client Statements of Work (SOWs) and Report Summaries
6. Office Hour Summaries
7. Sample Constant Contact Email Blasts Promoting Workshops
8. Client Letters of Recommendation
9. Job Description for NPHD Director
10. NPHD proposal to Brooklyn Org for workshop presentations

## NPHD Staff Roster FY 2024

Specialist First Name	Specialist Last Name	Areas of Expertise	Phone Number	Email	Home Address
Lara	Cohn	Communications and Social Media	(646) 596-6377	lcohn@rosecomm.com	1401 Hudson Street, 203 Hoboken, NJ 07030
Amy	Fiore	Fund development, Governance, Strategy	917-304-7434	amy@sobelbixel.com	2261 Newark Avenue Scotch Plains, NJ 07076
Eric	Graig	Data and program evaluation	(917) 535-2967	egraig@usablellc.net	370 W255th Street Bronx, NY 10471
Inna	Karalitsiy	Administrative	646-963-3777	inna@jccgci.org	7889 Rockport Circle Lake Worth, FL 33467
Boris	Kievsky	Digital strategy, storytelling and websites	917-553-4874	boris@dotorgstrategy.com	23 Audobon Rd Livingston NJ 07039
Jeri	Mendelsohn	NYC Discretionary Funding, Fund development	917-567-3331	jerimendelsohn1@gmail.com	115 Oak St. Woodmere, NY 11598
Jill	Mendelson	Management, general capacity building	(917) 774-8416	mendelsonjill@gmail.com	2550 Independence Ave, Bronx, NY 10463
Rosemary	Ostmann	Communications and Social Media	(201) 615-7751	rostmann@rosecomm.com	22 South Cescent Maplewood, NJ 07040
Linda	Rich	Leadership, coaching	(917) 945-4001	linda@lindarich.com	200 West 86th Street, 14K New York, NY 10024
Yisroel	Schulman	Legal, governance	(914) 588-0889	yisroelschulman@gmail.com	9553 NW 42nd Court Coral Springs, Florida 33065

## NYC Council Discretionary Funding Workshops Final Report FY24

**Submitted by: Jeri Mendelsohn, LCSW**

**Date: June 25, 2024**

An integral element of the JCCGCI's NonProfit Help Desk, NYC Council Discretionary Funding Workshops are a longstanding program of JCCGCI, made possible through funding from New York City Council. To assist non-profit agencies better understand and negotiate the complex process of applying for and receiving Discretionary funding, the NonProfit Help Desk partners with Council Member (CM) co-sponsors and provides a needed service, guiding agencies as they embark on Discretionary Funding applications. As JCCGCI helps the Discretionary process become more transparent, accessible and equitable, additional not for profit organizations have been awarded funding for important community programs and the not-for-profit sector is strengthened. As a result, increased numbers of New Yorkers are assisted in receiving life sustaining and life enhancing programs and services.

### **FY 24 Discretionary Funding Workshop Summary of Project Activities:**

- **# of Workshops – 16 Workshops** were offered using video conferencing
- **# of Participating Council Members – 14 City Council Members** co-sponsored FY24 Discretionary Funding Workshops.
- **# of Registered Participants** (includes registration as well as access to course recording and slide deck) **1,966 registered participants**
- **# of Attendees at Workshops** (includes presence at the course as well as access to course recording and slide deck) **1,178 attendees at workshops**
  
- **# of Organizations Receiving Individual Consultations – 29 organizations**

### **Agencies Receiving Consultations for Discretionary Funding:**

Major topics included helping organizations understand eligibility for applying for Discretionary funding, the steps to establish a PassPort account that is necessary for pre-qualification, reviewing application questions, and the steps for contract registration. Several organizations also received assistance in Application review prior to submission.

1. Brooklyn Animal Action

2. Marcy Houses Memorial Scholarship
3. Shostakovich School of Music, Art, and Dance
4. A-Lita
5. The Jersey Mann Basketball Tournament
6. Lifegivers Outreach
7. Shalom Senior Center
8. Tran Relief
9. Southeast Asia Women's Project
10. NYS Sickle Cell Advocacy
11. New Amsterdam Musical Association
12. Ukrainian New Wave Corporation
13. Yeshoa Worldwide
14. 360 Academic Sports Academy
15. Cumbe: Center for African & Diaspora Dance
16. Small Property Owners of New York
17. Sunset Park Lions Club
18. Divine Victorian
19. 23<sup>rd</sup> Street Community Garden
20. United Hands Organization
21. START Treatment and Recovery Centers
22. United Jewish Communities of the East Side
23. Each Other's Keeper Ministry
24. Flatbush Community Alliance
25. It Takes a Community to Raise a Child
26. Lehman College Adult Learning Center
27. Community Driving
28. Kindred Bakery
29. CV Dignity

### **FY 24 Discretionary Funding Workshops – Course Descriptions:**

**Introduction to NYC Council Discretionary Funding Workshop**, a 90-minute workshop, to help agencies understand the purpose of the funding, eligibility, and assess their organization's current readiness for the application process. Three sessions were conducted.

**The Discretionary Process – Simplified** a 90-minute workshop, to assist agencies begin to prepare their applications by presenting important background information, providing instruction on pre-qualification procedures, and a thorough review of the Discretionary Application. Five sessions were conducted.

**Capital Grants Process**, a 90-minute introduction to the Discretionary Capital Grants process, reviewing eligibility, guidelines, descriptions of the various types of capital improvements available for funding, as well as the specific funding responsibilities necessary for organizations to consider. Two sessions were conducted. Notably, the second Capital Grants Workshop was co-sponsored with Brooklyn Org who contributed \$200 to help defray program costs.

**Workshopping Your Grant**, a 90-minute group Help session in which the Discretionary application is reviewed, and group members ask questions regarding their specific application that is in process. Two sessions were conducted.

**Next Steps**, a new workshop, introduced for JCCGCI's FY 24 Discretionary Programs, helped agencies who were awarded NYC Council Discretionary Funding understand the processes involved in successfully working with the Mayor's Office of Contract Services. Created at the request of Councilmembers with the express purpose of helping nonprofits access their awards, this 90-minute workshop discusses the required actions agencies need to complete to have their awards become approved NYC contracts. This constitutes the critical element needed so agencies can have their contracts registered, provide services, bill for their approved expenses, and receive their funding. **Next Steps** also provides information to help organizations complete the tasks, such as Work Scopes and Budgets, required by the NYC Contracting Agencies. Four sessions were conducted.

**FY 24 List of Council Members Co-Sponsoring Discretionary Workshops:**

Name of Council Member	District
Adrienne Adams, Speaker of NYC Council	28 Queens
Alexa Aviles	38 Brooklyn
Justin Brennan	47 Brooklyn (new district)
Shahana Hanif	39 Brooklyn
Crystal Hudson	35 Brooklyn
Rita Joseph	40 Brooklyn
Ari Kagan	47 Brooklyn
Farah Louis	45 Brooklyn

Francisco Moya	21 Queens
Mercedes Narcisse	46 Brooklyn
Lincoln Restler	33 Brooklyn
Inna Vernikov	48 Brooklyn
Kalman Yeger	44 Brooklyn
Susan Zhuang	43 Brooklyn

## Analysis:

### Council Member Involvement:

We are pleased to note that for the first time, a sitting Speaker of the NYC Council, Adrienne Adams, co-sponsored a Discretionary Funding Workshop. New members of NYC Council, Francisco Moya and Susan Zhuang were also co-sponsors. They, and their staff members were eager to learn more about the Discretionary Funding process. However, it is concerning that there was a total decrease of four Council Members participating as co-sponsors from 2023 (18 CM co-sponsors) to 2024 (14 CM co-sponsors). This decrease resulted primarily from the fact that the full Brooklyn Delegation did not offer workshops together as they had in previous years leading to a loss of 5 CM co-sponsors. While many members of the Brooklyn Delegation eagerly offered workshops, even multiple workshops, there were other members who specifically chose not to be involved even with numerous outreach attempts Jeri Mendelsohn.

This decrease may well reflect internal dynamics within NYC Council itself. Further, this year was particularly turbulent with the impact of October 7, the Israel Hamas War, as well as ongoing dialogue between City Council and the NYC Mayor regarding the budget and priorities for funding. A significant factor this program year possibly contributing to the decreased number of CM co-sponsors, were the multiple providers of Discretionary Funding Workshops, including the Mayor's Office of Contract Services, NYC Council, as well as individual Council Members in a specific effort to demonstrate a more equitable, open Discretionary funding process.

In general, the process of outreach and confirmation of NYC Council Members to serve as co-sponsors is extraordinarily time consuming. It should be noted that JCCGCI is the only organization that provides specialized workshops in addition to Discretionary Funding that address specific learning needs such as Capital Grants,

Next Steps, and application assistance offered through Workshopping Your Grant and individual consultations. Council Members look to JCCGCI's NonProfit Help Desk to assist agencies that received Discretionary Awards "to bring down the money," helping with prequalification procedures, contract registration, and the completion of Contracting Agency forms. That is the rationale behind the Next Steps Workshops that were presented on four occasions, serving 204 participants. Further, as will be more comprehensively addressed, participation in JCCGCI's NPHD Discretionary Workshops increased from 2023 to 2024!

### Participant Trends:

There was a 12.5% increase in attendance in workshops from 2023 (**1,031**) to 2024 (**1,178**). In addition, 60% of individuals registering for workshops attended their scheduled workshops. This metric is highly significant as, according to DYCD in their 2023 Capacity Building RFP, typically less than 50% of virtual registrants attend workshops. This pattern of an increased number of participants accompanied by a high level of retention from registration to the course, suggests that nonprofit agencies value the JCCGCI NPHD Discretionary Workshop series and are eager to increase their capacity to do business with NYC, write competitive proposals, and acquire additional resources for their agencies as well as services for their communities.

Traditionally, Discretionary Workshops were conducted exclusively in the early evenings to accommodate small nonprofits having leadership that typically holds day jobs in addition to their work in their fledgling organization. Councilmembers also have responsibilities during the days for hearings and Stated Sessions. However, this pattern posed barriers in participation for several individuals who stated that they had childcare and family responsibilities in the evening and could not be involved in 90-minute courses. Therefore, as an innovation for FY24, select courses were offered at noontimes to accommodate individuals previously unable to participate. In the case of Capital Grants, it was important to schedule the workshop during the day since the requirement for capital funding includes an organization having a minimum of one full-time paid employee.

There was also a 21% increase in the number of organizations receiving individual consultations from 2023 (**23**) to 2024 (**29**). Some organizations received several individual sessions. Participating agencies were assisted in a variety of different ways, including review of their Discretionary Applications, support in the prequalification process, NYS Charities Registration, introduction to policies such as EEO and Sexual Harassment that need to be developed and enacted by an organization prior to receiving a NYC Contract.



The following email excerpt is an example of the effectiveness of the combined workshop and consultation services:

*“Hi Jeri,*

*I'm working on our FY2025 application, and you were so very helpful last year which led to our first grant from the City!! She then goes on to discuss her questions regarding her current proposal.*

*Valerie Johnson, Marcy Houses Scholarship Program”*

### Program Operations:

The use of videoconferencing diminishes barriers to attendance. In fact, participants in the FY24 workshops represented organizations in each of New York City's five boroughs! A logistical challenge needs to be solved when presenting to large numbers of participants, using technology that occasionally is difficult for the presenter and participants, ensuring that CM and their teams had opportunities to present, and being responsive to participant questions. One person, the presenter, cannot simultaneously negotiate all these tasks. While the JCCGCI team graciously assists in this challenge, it would be helpful for there to be a member of the JCCGCI team with specific responsibilities for program assistance to diminish the burden on members of the team having other responsibilities, particularly since most sessions are from 6:00PM – 7:30PM as well as eliminating the time involved in recruiting assistance. Many thanks to Jill Mendelson, Tova Rosenblum, Sara Chamana, Linda Rich, and Inna Karalitskiy who were involved in monitoring the chat and provided help throughout FY24 sessions. Through their efforts, individual inquiries were addressed, the chat function was monitored, tech problems were solved, the participants were welcomed, and the JCCGCI and its NonProfit Help Desk was introduced within each session.

We were proud to start offering our Discretionary Workshops in multiple languages, Chinese and Spanish, using Zoom translation services to caption the presentations. In addition, the slide decks used in presentations were sent to CMs prior to the presentations who provided helpful translation to their constituents.

The development of outreach materials for each workshop and workshop series, collaboratively developed by Inna Karalitskiy and Jeri Mendelsohn, were critical to the initiative's success. Outreach flyers that contained specific acknowledgement of the CM co-sponsors were provided to each CM for distribution, sent to the JCCGCI large distribution lists, posted on the website, as well as listed on Event Brite. Several CM offices were extraordinarily engaged in workshop outreach.

### Response to Discretionary Funding Workshop Series:

When reviewing the workshops with various Council Members and their staffs, the response was overwhelmingly positive. They were grateful to JCCGCI and for the guidance provided. Some staff members suggested areas to address within workshops that would assist them in working with CBOs seeking funding. CM repeatedly discussed having their offices spend too much time with organizations who were not ready to apply for funding and have made awards, on occasions, to agencies who did not understand the procedures and requirements involved in doing business with NYC and are grateful for the new course content.

The positive response to our innovative course content may be seen in the interest of outside funders to contract with JCCGCI for the provision of specialized courses. Building upon the Brooklyn Org's sponsorship of a Capital Grants course, JCCGCI's NonProfit Help Desk will receive additive funding from the NYC Capacity Building Collaborative, a consortium of funders including Brooklyn Org, for Jeri Mendelsohn to present two workshops on Capital Grants within the next few months, one scheduled for July 23, 2024, and a second workshop scheduled for September 12, 2024.

The innovations to the Discretionary Workshop course content were responsive to the needs of the CMs and their staff. The new workshops were well attended. Participants stated that the workshops were informative and of help as they embarked upon complex applications and challenging processes. There is continuing concern about helping organizations who have received funding, "bring the money down," embarking on the various prequalification and contracting processes with New York City. Significantly, 60% of the individual consultation sessions conducted in FY24 were working with organizations that had been approved for Discretionary Funding but did not understand how to proceed with NYC. Many of these organizations had been referred to JCCGCI for assistance by their CM.

### **Recommendations:**

- Increase outreach to CM and their staff to include more co-sponsors, with particular emphasis on increasing the geographic representation of the CMs.
- Share outreach function to CM with full-time JCCGCI personnel engaged in external relations. When specifically working with CM offices regarding the scheduling of Discretionary Workshops, it is likely that Council Members and

their teams do not fully recognize JCCGCI as the agency that supports the NonProfit Help Desk workshops. This is one consequence of term limits since there are increasing numbers of CMs unfamiliar with the agency. Therefore, it is recommended that to capitalize upon the relationships built with NYC Council Members, outreach for the workshops include members of JCCGCI's full-time team.

- It is recommended that responsibilities of the administration of the NonProfit HelpDesk include developing outreach materials for the Discretionary Funding Workshops as part of the Department as well as coordinating the staffing needed to support the Workshops as is done for all other workshops. Using Jeri Mendelsohn's time allocation in this manner limits the time spent in other important areas, creating and updating presentations, working with agencies, and working with CMs.
- Create an additional workshop series, possibly with invited guests from DYCD, that occurs after the NYC Budget is finalized and the publication of Schedule C that invites participants to learn about the contracting process, agency responsibilities, and compliance.
- Develop a short evaluation survey so that participants in the Discretionary Workshops can share what elements they found effective, and what can be improved.
- Develop a referral form for organizations that seek Individual Consultation services to ensure alignment with the scope of services available and that acknowledges time limits allocated for individual help. For example, several organizations sought help in wanting JCCGCI to input their data and applications for them, or write their proposals, neither of which is within the scope of services available. Several organizations requested multiple, lengthy appointments including presentations to their Boards. Offering services in a transparent manner can help avoid disappointment for organizations and JCCGCI can more effectively manage expectations.

### **Proposed Timeline for FY25 (contingent on continued/enhanced funding)**

It is recommended that the Discretionary Workshop program be extended to include activities occurring 10-months per year, following the finalization of the

FY25 budget and publication of Schedule C to include 100 hours of professional time annually.

- The additional time will enable increased outreach to CM and their offices as well as the development of workshops that feature multiple co-sponsors.
- In the first months, Next Steps Workshops will focus on facilitating the implementation of Discretionary funded projects and assisting agencies in understanding the NYC contracting process. The workshop will be presented several times during the year and hopefully, will include participation by members of NYC government who partner with not for profits in the contracting process from MOCS and DYCD.
- The Discretionary Workshops will then proceed as has been done in this past year, focusing on Introductory Workshops prior to the release of the Discretionary Application and following up with The Discretionary Process – Simplified and Workshopping Your Application, Capital Grants, and group Workshopping sessions.

## NPHD: Client Services Summary FY 2024

	Client Organization	Project Description	Project Type	Staff First Name
1	The Curly Code	Review and editing of grant related materials	Office Hours	Amy Fiore
2	The Childcare Hub	Review and editing of grant related materials	Office Hours	Amy Fiore
3	Training For Life	Review and editing of grant related materials	Office Hours	Amy Fiore
4	Center For Hope Services	Review and editing of grant related materials	Office Hours	Amy Fiore
5	NJ Alliance	Review and editing of grant related materials	Office Hours	Amy Fiore
6	The Gianna Effect Foundation	Consultation on maximizing discretionary funding	Office Hours	Amy Fiore
7	Jewish Community Relations Council of New York	Develop, administer and report on the findings of a survey of participants in a fellowship program.	SOW	Eric Graig
8	Daycare Council	User engagement and storytelling	Office Hours	Boris Kievsky
9	American Legion	User engagement, storytelling, software	Office Hours	Boris Kievsky
10	Renaissance Schools	Website and fundraising	Office Hours	Boris Kievsky
11	Haven Midwifery	User engagement, storytelling and CRM platforms	Office Hours	Boris Kievsky
12	Bala Chabad	Website and storytelling	Office Hours	Boris Kievsky
13	Utopia Resource Center Greater New York	Website assessment	Office Hours	Boris Kievsky
14	Veronica Arts Media	Website assessment and storytelling	Office Hours	Boris Kievsky
15	Brooklyn Animal Action	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
16	Marcy Houses Memorial Scholarship	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
17	Shostakovich School of Music, Art, and Dance	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
18	A-Lita	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
19	The Jersey Mann Basketball Tournament	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
20	Lifegivers Outreach	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn

21	Shalom Senior Center	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
22	Tran Relief	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
23	Southeast Asia Women's Project	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
24	NYS Sickle Cell Advocacy	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
25	New Amsterdam Musical Association	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
26	Ukrainian New Wave Corporation	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
27	Yeshoa Worldwide	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
28	360 Academic Sports Academy	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
29	Cumbe: Center for African & Diaspora Dance	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
30	Small Property Owners of New York	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
31	Sunset Park Lions Club	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
32	Divine Victorian	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
33	23rd Street Community Garden	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
34	United Hands Organization	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
35	START Treatment and Recovery Centers	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
36	United Jewish Communities of the East Side	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
37	Each Other's Keeper Ministry	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
38	Flatbush Community Alliance	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
39	It Takes a Community to Raise a Child	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
40	Lehman College Adult Learning Center	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
41	Community Driving	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
42	Kindred Bakery	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn

43	CV Dignity	Review of application for NYC Discretionary Funding	Office Hours	Jeri Mendelsohn
44	Koenig Childhood Cancer Foundation	Securing national broadcast media coverage	SOW	Rosemary Ostmann & Lara Cohn
45	MORE Opera (Manhattan Opera Repertory Ensemble)	Press releases and media alerts to promote MORE Opera	SOW	Rosemary Ostmann & Lara Cohn
46	Groove With Me	Media training and production of a video	SOW	Rosemary Ostmann & Lara Cohn
47	Loving Others in Unity	Media training, press alerts, general advice to promote Loving Others in Unity	SOW	Rosemary Ostmann & Lara Cohn
48	Dynamic Duo with Dylan/Lucy Antoine	Organizational development consultation	Office Hours	Rosemary Ostmann & Lara Cohn
49	Washington Heights Y	Leadership development for a staff team working in a new location	SOW	Linda Rich
50	Education for New Americans	Nonprofit Tax-Exempt Status	SOW	Yisroel Schulman
51	Aimasai: Making Moments Matter	Nonprofit Tax-Exempt Status	SOW	Yisroel Schulman
52	Ludy Shaw	Nonprofit Tax-Exempt Status	SOW	Yisroel Schulman
53	Spring Forward	Nonprofit Tax-Exempt Status	SOW	Yisroel Schulman
54	Vanity Beauty Bar	Nonprofit Tax-Exempt Status	SOW	Yisroel Schulman
55	48th Mill Island Block Association	Legal consultation	Office Hours	Yisroel Schulman
56	Assn. of Children of WWII	Legal consultation	Office Hours	Yisroel Schulman
57	Bayview Houses	Legal consultation	Office Hours	Yisroel Schulman
58	Brighter Stars of the Future	Legal consultation	Office Hours	Yisroel Schulman
59	Espressivo Orchestra	Legal consultation	Office Hours	Yisroel Schulman
60	On My List	Legal consultation	Office Hours	Yisroel Schulman
61	Jewish Community Relations Council of New York	Legal consultation	Office Hours	Yisroel Schulman

NYC Discretionary and Capital Funding Workshops & Organizational Development Workshops 2023-2024

Name of Workshop	Type (Discretionary Funding or Seasonal)	DATE	Number of Registrants	Number of Attendees
Next Steps - Co-Sponsored by Farah Louis	Discretionary Funding	Monday, October 23, 2023	77	38
Next Steps - Co-Sponsored by Crystal Hudson	Discretionary Funding	Thursday, November 2, 2023	132	62
Next Steps - Co-Sponsored by Ari Kagan	Discretionary Funding	Wednesday, November 8, 2023	69	40
Intro to Discretionary Funding by Inna Vernikov	Discretionary Funding	Monday, December 4, 2023	101	36
Intro to Discretionary Funding by Ari Kagan	Discretionary Funding	Monday, December 11, 2023	70	40
Intro to Discretionary Funding by Rita Joseph	Discretionary Funding	Thursday, January 4, 2024	189	118
Discretionary Process, Simplified by Speaker Adrienne Adams	Discretionary Funding	Monday, January 8, 2024	206	142
Discretionary Process, Simplified by Speaker Alexa Aviles	Discretionary Funding	Friday January 12, 2024	126	97
How to Apply for NYC Council Capital Grants by Kalman Yager	Discretionary Funding	Wednesday, January 17, 2024	126	90
Discretionary Process, Simplified by Speaker Mercedes Narcisse & Farah Louis	Discretionary Funding	Monday, January 22, 2024	196	132
Discretionary Process, Simplified by Speaker by Rita Joseph, Shahana Hanif, Crystal Hudson, Lincoln Restler	Discretionary Funding	Thursday, January 25, 2024	163	130
Discretionary Funding- Workshopping Your Grant Spon. by CM Moya	Discretionary Funding	Thursday, February 1, 2024	102	47
Discretionary Process: Simplified Sponsored by NYC CM Susan Zhuang	Discretionary Funding	Monday, February 5, 2024	58	39
How to Apply for NYC Council Capital Grants NYC CM Farah Louis	Discretionary Funding	Thursday, February 8, 2024	163	79
Discretionary Funding- Workshopping Your Grant Spon. by CM Justin Brannan	Discretionary Funding	Monday, February 12, 2024	59	24
Discretionary Funding- Next Steps Co-Sponsored by CM Farah Louis	Discretionary Funding	Monday, February 26, 2024	129	64
NPHD Workshop: Part One: Nonprofit Websites	NPHD Seasonal Series	Tuesday, November 21, 2023	141	58
NPHD Workshop: Part Two: Website Story-Telling	NPHD Seasonal Series	Tuesday, December 05, 2023	107	36
NPHD Workshop: Fundraising Readiness	NPHD Seasonal Series	Tuesday, December 12, 2023	108	35
NPHD Workshop: Part Three: Driving Action in Your Impact Funnel	NPHD Seasonal Series	Tuesday, December 19, 2023	93	35
NPHD Workshop: Planning for Your Organization's Future	NPHD Seasonal Series	Tuesday, January 09, 2024	87	48
NPHD Workshop: Coaching Skills: Bolster Performance & Engagement	NPHD Seasonal Series	Tuesday, January 16, 2024	107	56
NPHD Workshop: Part One: Basic Data Every Social Change Organization Should Collect	NPHD Seasonal Series	Tuesday, January 23, 2024	167	85
NPHD Workshop: Part Two: Logic Models	NPHD Seasonal Series	Tuesday, February 06, 2024	95	43
NPHD Workshop: The Power of Effective Story-Telling: Koenig Childhood Cancer Foundation	NPHD Seasonal Series	Tuesday, February 13, 2024	59	25
NPHD Workshop: Building an Effective Donor Communications Strategy: Part One: The Intersection Between Fundraising and C	NPHD Seasonal Series	Tuesday, March 26, 2024	106	45
NPHD Workshop: Building A Board From The Bottom Up	NPHD Seasonal Series	Tuesday, April 2, 2024	133	51
NPHD Workshop: Building an Effective Donor Communications Strategy: Part Two Fundraising X Communications Workshop; "S	NPHD Seasonal Series	Tuesday, April 16, 2024	81	36
NPHD Workshop: How to Write A Winning Grant Proposal Part 1	NPHD Seasonal Series	Tuesday, May 7, 2024	251	126
NPHD Workshop: How to Write A Winning Grant Proposal Part 2	NPHD Seasonal Series	Tuesday, May 14, 2024	250	91
NPHD Workshop: Leading Now: Part One: Managing Performance	NPHD Seasonal Series	Tuesday, May 21, 2024	158	47
NPHD Workshop: Leading Now: Part Two: Delegation, Motivatioon, And Development	NPHD Seasonal Series	Tuesday, June 4, 2024	127	42
<b>Total</b>			<b>4036</b>	<b>2037</b>



## JCCGCI Non Profit Help Desk and The Jewish Community Relations Council-NY Statement of Work

### Introduction

The Bridges-NY Fellowship, a program from the Jewish Community Council of Greater New York (JCCGNY), seeks to connect and empower the next generation of New York City's civic leaders who aspire to run for public office. The program includes learning sessions with guest speakers; networking and mentorship opportunities; social events; and has as a centerpiece, a five-day trip to Israel and the Palestinian Territories and a four-day trip to Puerto Rico. [The Israel trip was postponed in 2023 due to the events of October 7<sup>th</sup>]. NPHD worked with the Bridges program to develop, administer and report on the findings of a survey of participants in the 2023 cohort. The project commenced in January of this year and concluded with the submission of a final report in March.

### Project Outcomes

Given Bridges' focus on nurturing and developing the next generation of civic leaders in New York, the questionnaire focused on the practical use of the knowledge gained from the four selected didactic sessions that took place and included a series of open-ended questions that asked participants to describe how they were using what they learned. The survey collected at least partial responses from all sixteen program participants. Half (50%) reported that they were currently using what they learned and forty-three percent (43%) reported that they expected to use what they learned in the future. Through the qualitative questions, participants shared comments on the application of session learnings, highlighting enhanced leadership skills, better engagement with diverse communities, and strategic advocacy within government frameworks. The importance of inclusivity, collaboration, and effective communication was emphasized across sessions, with practical strategies for social media engagement and policy advocacy being particularly valued. The feedback underscores the sessions' success in fostering a deep appreciation for intergroup relations as well as strategies for navigating the complexities of city government.

Respondents also noted the strong and enduring relationships forged among fellows, characterized by mutual support, professional collaboration, and a shared commitment to advancing public service. Based on these relationships, participants expressed a keen interest in continued engagement through alumni programming, suggesting workshops, networking events, and mentorship pairings to enrich their ongoing educational and professional journeys.



November 1, 2023

JCCGCI The NonProfit Help Desk - Statement of Work  
**Koenig Childhood Cancer Foundation**

Background

Cancer survivor, Elana Koenig, and her younger sister Sabrina started Koenig Childhood Cancer Foundation (KCCF) in 2020. The organization's mission is to provide life-saving financial and emotional support to children battling cancer as well as to their families. In addition to covering expenses to access healthcare, the team collects donations to pay for toys, care packages, hospital visits and other forms of support.

Elana's journey and origin story have been covered by the local media in New York. The NonProfit HelpDesk worked with KCCF in the spring of 2023 to secure coverage in *People*. The Foundation is now seeking counsel on how to pitch their story to national broadcast outlets.

Services

The NonProfit HelpDesk's Rosemary Ostmann will provide communications support and advice to KCCF's Rena Koenig (Elana's mom). The work will focus on the most effective and compelling ways to pitch her story as well as identification of national broadcast media opportunities.

Deliverables

Upon approval of the SOW, Rosemary will connect with Rena to gather all information and materials needed and answer any additional questions. From there, Rosemary will work with Rena on drafting a pitch and identifying possible outlets for outreach. Rosemary will leverage contacts to generate feedback and possible interest in the KCCF story. If an opportunity is secured, Rosemary will support Rena and Elana to ensure the organization's story is effectively told.

As an outcome of the communications counsel, Rena will feel empowered to pitch a story to national media and see it through to completion. She will also learn how to leverage the third-party exposure to build credibility and engage donors. A brief final report summarizing the work will be prepared by Rosemary with input from Rena.

Timing and Hours

We will start right away and wrap up our work by June 15, 2024. It is estimated that the work described above will require up to 20 hours of consulting time.



It Is Understood That:

1. Through The NonProfit Help Desk, Rosemary Ostmann will provide communications consulting at no cost to KCCF. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. KCCF will make every effort to participate fully in the consulting process, including meetings scheduled to accommodate everyone's calendar. Participants will take responsibility for early notice in case their calendar changes and a meeting needs to be rescheduled. Additionally, any follow-up 'homework' assigned by the communications consultant will be completed and submitted as requested.
3. In mid-June, KCCF will be asked to complete a short survey and/or participate in an individual or group feedback meeting, to collect feedback on their project. Completion of the survey in a timely manner will be expected and appreciated.

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*Rena Koenig* 6/7/2024  
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Rena Koenig  
Koenig Childhood Cancer Foundation

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*Rosemary Ostmann* 6/7/2024  
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Rosemary Ostmann, NPHD Facilitator  
NPHD

## Final Summary Report – Koenig Childhood Cancer Foundation

June 28, 2024

Overview: NPHD facilitator Rosemary Ostmann provided media relations counsel and support to the Koenig Childhood Cancer Foundation’s (KCCF) “mom helper” Rena Koenig. Rena had attended one of our storytelling workshops in 2023 and reached out directly to enlist our help. While her daughter Elana’s Foundation had received local broadcast attention, she was interested in understanding how they could take their exposure to the next level by reaching national media. Focusing on the most effective and compelling ways to pitch Elana’s story, we were successful in securing a two-page feature story in PEOPLE that published in July 2023. KCCF leveraged the coverage on social media, on its website and via email outreach. They received several donations from individuals who learned about Elana’s story from PEOPLE.

When we connected with Rena to see how we could be supportive in 2024, she asked for our help in pitching national broadcast media.

### The work focused on:

- Meeting with Rena to get up to speed on KCCF and updates on Elana’s journey
- Researching earned media opportunities with national broadcast outlets
- Pitching Elana Koenig to our contacts at Good Morning America (tied to host Michael Strahan’s daughter’s cancer diagnosis) and as a “Rad Human” to The Kelly Clarkson Show” (TKCS), which moved from Los Angeles to New York in 2023
- Working with Rena and Elana to create a “Hi Kelly” video after producers at TKCS expressed interest. The perfect opportunity to invite Elana to the show came in early January when one of the guests had his own childhood cancer connection
- Coordinating the interview with the producers and accompanying Elana to the taping. Kelly Clarkson named Elana one of the youngest Rad Humans ever and the guest, musician/actor Charles Esten, invited Elana on air to perform at his benefit concert in the fall; actor Kevin James was also a guest and Rena later contacted him and he made a substantial donation. TKCS shared the segment on social and tagged KCCF, extending its social reach. TKCS will accompany Elana to Nashville and film her performance, extending the coverage to more than a single appearance
- Writing a nomination for CNN Heroes, which Rena worked with one of the Foundation’s beneficiaries to submit ahead of the deadline

**Deliverables:** Clips of the interview are available on YouTube and on TKCS social channels. Rena has effectively promoted the clips on the organization's website and social channels. She now has several new high-profile relationships to leverage and another appearance to promote in the fall. CNN won't make its decision on its Heroes finalists until early winter, but Rena has a well-written nomination from which she can pull narrative for other awards.

**Conclusion:** We were thrilled to secure national broadcast exposure for Elana's powerful story. When people learn about her journey and her courage, they want to get involved. It's incredible to see how the stories we placed led to new relationships with donors. I believe this experience also gave Rena an opportunity to learn how to navigate national media for the future. Her efforts to merchandize the coverage as third-party credibility paid off, literally and figuratively.

**In Rena's words:**

"It was a pleasure to work with Rosemary and the NonProfit HelpDesk again this year. We learned so much about positioning KCCF for national media exposure and how to leverage the attention to reach new donors. Coverage in both PEOPLE magazine and on The Kelly Clarkson Show catapulted our credibility and awareness. We will continue to build on what was accomplished to achieve our long-term goals as a nonprofit."



April 22, 2024

JCCGCI The NonProfit Help Desk - Statement of Work

**MORE Opera (Manhattan Opera Repertory Ensemble)**

Overview

Lara Cohn and Rosemary Ostmann of the NonProfit HelpDesk worked with MORE Opera, and its founder professional opera singer Cheryl Warfield, in the spring of 2022. We helped Cheryl with messaging strategy and media outreach in order to tell the MORE Opera story more effectively, focusing on her goals of bringing awareness of opera to people of color and making it fun and available for all.

Over the last year, Cheryl has continued to focus on making professional-level opera accessible to people of all ages and backgrounds and underserved communities in New York City. She has participated in various performances alongside her fellow MORE Opera artists and community chorus. Beyond MORE, she is the secretary of The New York Opera Alliance, recently became a certified Minority and Women-Owned Business Enterprise (MWBE), takes time for her own performances, teaches a class at IS 429 in Sunnyside, Queens, presents vocal workshops and coaches private clients. Simply put, Cheryl has her hands in many projects at once.

Cheryl recently learned MORE Opera has been awarded a new and highly competitive two-year \$25,000 grant by OPERA America. From over 30 applicants across the five boroughs of New York City, the community-based, non-profit opera company is one of 10 winners. The grant money will be used towards bringing on a part-time paid development consultant. The grantors are set to announce the recipients soon, but she must wait until their press release before MORE Opera can publicize the win.

Cheryl and MORE Opera have numerous performances coming up in April, May and June. This year's Juneteenth Jubilee celebration is made possible by a grant from the New York City Department of Cultural Affairs, in partnership with the City Council and the New York State Council on the Arts, with the support of the office of the Governor and the New York State Legislature and is administered by the Lower Manhattan Cultural Council.

During our in-take, we learned that Cheryl believes her primary challenge currently lies in balancing between her personal career obligations and her commitments to MORE Opera. All of these experiences are important to her work and her story, but she's often too busy to stop and share the good news in a way that brings her audiences along on her journey.



## Services

The NonProfit HelpDesk's Lara Cohn and Rosemary Ostmann ("coaches") will provide communications support for MORE Opera and Cheryl Warfield.

The objective is to enable Cheryl to "find clarity and better ways to articulate the things she does" in order to support fundraising and grant efforts. She also wants MORE to be attractive to a new development hire and summer intern.

The work will cover: updating Cheryl's bio to make it clear she is a teaching artist and performer; drafting and distributing a press release announcing the OPERA America grant; reviewing a thank you letter to the OPERA America panel of judges; posting key upcoming events to local calendar listings; conducting media relations outreach for select initiatives and providing directions on where and how to post community events following our work together.

## Confidentiality

The communications support is based on a confidential relationship of trust between coaches and client. The coaches will not at any time disclose or communicate the content or details of our meetings without the client's permission. The coaches have access to support and supervision from colleagues and may share information with them for these purposes only; confidentiality standards apply to these individuals as well.

## Deliverables

Upon approval of the SOW, Lara will connect with Cheryl in order to gather all final materials needed, including details of upcoming events and initiatives and answer any additional outstanding questions.

From there, Lara and Rosemary will draft all materials as stated in Services and simultaneously conduct media outreach. We will connect as needed on email or phone with any questions. Lara will speak with Cheryl to review our recommendations, make any edits and present final materials.

As an outgrowth of the communications recommendations, Cheryl will feel confident in telling MORE's evolving story and in engaging with stakeholders and potential donors. She will be able to use the press materials to refine the content on her website and social channels. A final report summarizing the communications efforts will be prepared by Lara and Rosemary, with input from Cheryl regarding the outcomes she wants to highlight.

## Timing and Hours



Consulting will take place from mid-April through the end of May 2024. It is estimated that the work described above will require approximately 20 hours of consulting time. In addition to delivery, this covers preparation, research, materials development, follow-up, and communication between meetings, within reason.

It Is Understood That:

1. Through The NonProfit Help Desk, Lara Cohn and Rosemary Ostmann will provide communications consulting at no cost to Cheryl Warfield. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. Cheryl will make every effort to participate fully in the consulting process, including meetings scheduled to accommodate everyone's calendar. Participants will take responsibility for early notice in case their calendar changes and a meeting needs to be rescheduled. Additionally, any follow-up 'homework' assigned by the communications consultant will be completed and submitted as requested.
3. In mid-June, Cheryl will be asked to complete a short survey and/or participate in an individual or group feedback meeting, to collect feedback on their project. Completion of the survey in a timely manner will be expected and appreciated.

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*Cheryl Warfield*  
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 Cheryl Warfield, Founder and Executive Director  
 MORE [Manhattan Opera Repertory Ensemble] Opera

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*Lara Cohn*  
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 Lara Cohn, NPHD Facilitator  
 NPHD

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*Rosemary Ostmann*  
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 Rosemary Ostmann, NPHD Facilitator  
 NPHD



## Final Summary Report – MORE Opera

June 28, 2024

Overview: NPHD facilitators Rosemary Ostmann and Lara Cohn provided communications counsel, media relations and content development support to professional opera singer Cheryl Warfield, founder of MORE Opera, in order to continue to raise her nonprofit's visibility. Cheryl had worked us in 2022 and also participated in a few of our workshops. She reached out to us following one of our Spring workshops asking if she was eligible for more one-on-one consulting time, as she could use our help, including announcing a new and highly competitive grant by OPERA America.

### The work focused on:

- Meeting with Cheryl on an ongoing basis to review scope of work, gather event and grant details and discuss strategy and deliverables; creating agendas and next steps
- Participating in calls/email discussions with partners including OPERA America, Hudson Yards Hell's Kitchen Alliance and Hudson River Park Trust, to confirm their media guidelines
- Drafting a press release announcing MORE Opera's OPERA America grant award (based on questions we sent to Cheryl in order to help us draft the release)
- Providing guidance on how to post the press release and events to MORE Opera's website
- Researching earned media opportunities in national opera, nonprofit trade and local arts outlets to disseminate the press release
- Distributing the Opera America grant to national opera, nonprofit trade and local NYC arts media
- Sharing recommended edits to a calendar listing Cheryl drafted for NYC event online outlets, and offering direction and guidance on where and how to post community events
- Reviewing her current list of outlets for calendar listings and searching and suggesting additional local outlets for Cheryl to post key events
- Writing a media alert for two select performances
- Researching media in the NYC boroughs of Manhattan and Bronx where Cheryl's Spring performances were taking place

- Conducting media relations outreach for two performances and following up to secure coverage
- Providing Cheryl with updates on our outreach
- Securing an interview with Smiley News, a news publication that focuses on positive stories, and participating in various meetings regarding filming
- Reviewing and revising Cheryl's bio, creating both a long and short version
- Counseling on other items, issues/concerns including but not limited to: how to reach out to local politicians with her news, offered support/advice on how to ask to join an arts committee, asking Cheryl to think a little deeper about "why" she founded MORE Opera/why music is needed in these communities, sharing local events for her to attend for networking purposes as well as an award to enter

Deliverables: Please see materials delivered to Cheryl attached or hyperlinked, including:

- [OPERA America grant press release](#)
- Recommended changes to her bio (with long and short versions) to make it clear she is a teaching artist and performer
- Media alert for Juneteenth Jubilee concert

Results: The following results were garnered for MORE Opera:

- [OPERAWIRE](#)
- [Broadway World](#)
- [Smiley News](#) (30,000 followers)
- A reporter attended the Juneteenth Jubilee concert from Norwood News (bi-weekly newspaper that primarily serves the Northwest Bronx neighborhoods of Norwood, Bedford Park, Fordham and University Heights) and interviewed Cheryl; article expected to publish soon

Conclusion: Cheryl was lovely to work with as she had been two years ago. She told us was very appreciative of our help. She took our recommendations well and followed through with learning how to post some calendar listings herself. The ultimate goal was to enable Cheryl to feel confident in telling MORE's evolving story and in engaging with stakeholders and potential donors. I feel we accomplished that as she told us that discussing strategy is really helpful to her.

**In Cheryl's words:**



“Please know that you and NPHD have been an integral part of our success since 2022. I am so grateful. Please give me this summer to revamp our website and social media. I have documented your suggestions and will work on them upon my return. It has been a pleasure working with you again. Thank you for helping me find clarity and better ways to articulate the things I do. You have been a tremendous help to me personally and to MORE Opera. Have a wonderful summer.”



May 8, 2024

## JCCGCI The NonProfit Help Desk - Statement of Work **Groove With Me**

### Background

Groove With Me (GWM) is a nonprofit youth development organization offering free dance classes, and performance opportunities to attract and engage children during idle out-of-school hours and build achievement skills to fuel bright futures. GWM was founded in 1996 by Abby McCreath and grew to serve more than 200 students, 42 teachers, three full-time staff prior to the pandemic. Today they are at 100 students (many of whom are from bilingual or immigrant homes) and 17 teachers. 100% of GWM's students graduate from high school and are admitted in college – many the first in their families.

In January, GWM moved into a newly constructed 7,200 sq. ft. facility in East Harlem that is twice the size of the previous space. This new space gives them the capacity to have 400 students. It also has a 1,000 sq. ft. waiting room, which has become a safe space for the families of the students.

On our call with Abby, we learned that GWM is facing some growing pains. Some large, high-profile donors reduced their donations in recent months. Additionally, several board members have decided not to continue with the organization. As a result, its annual fundraising gala, Tap & Tapas, will not take place this year due to fewer board members available to sell tickets and secure donations.

The GWM story has been covered by the Today Show, Spectrum NY1 and a select few dance/performing arts publications over its nearly 30-year history. Abby, a mom to two pre-teen sons, wears many hats. She is seeking counsel on how to reintroduce her story to national and local media outlets in order to attract new donors, board members, staff and volunteer dance teachers, and to secure grants. GWM is planning an upcoming housewarming party to celebrate the new space, as well as the annual recital in June. Both of these can serve as opportunities for the media to get the latest GWM story and to meet Abby and her students.

There is a sense of urgency to raise awareness and showcase GWM as more than just dance classes for girls. The organization serves the whole family with other events, workshops and performances. We will weave compelling human-interest stories from alumni, teachers, current students and parents, as well as Abby's own personal story, in our media outreach.

### Services

The NonProfit HelpDesk's Rosemary Ostmann and Lara Cohn will provide communications support and advice to Abby and GWM. The work will focus on the most effective and compelling ways to pitch her story, the new studio, as well as identification of local and national media opportunities, to raise her visibility.



Deliverables

Upon approval of the SOW, Rosemary and Lara will connect with Abby in order to gather all information and materials needed, including photos, videos and identification of students and families, and answer any additional questions. From there, we will help her condense her messages into more succinct talking points. We will draft pitches and identify possible outlets for outreach, including national print. Additionally, we will reach out to local media to garner coverage of the May 17 housewarming event, if families approve, and prepare a media alert and list of media contacts for Abby to pitch the June 23 recital.

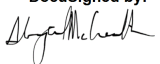
As an outcome of the communications counsel, Abby will feel empowered to frame and pitch her story to media. A brief final report summarizing the work will be prepared by Rosemary and Lara with input from Abby.


Timing and Hours


We anticipate the majority of the work for the announcement wrapping up by June 15, 2024. It is estimated that the work described above will require approximately 20 hours of consulting time.

It Is Understood That:

1. Through The NonProfit Help Desk, Rosemary Ostmann and Lara Cohn will provide communications consulting at no cost to GWM. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. GWM will make every effort to participate fully in the consulting process, including meetings scheduled to accommodate everyone’s calendar. Participants will take responsibility for early notice in case their calendar changes and a meeting needs to be rescheduled. Additionally, any follow-up ‘homework’ assigned by the communications consultant will be completed and submitted as requested.
3. In mid-June, GWM will be asked to complete a short survey and/or participate in an individual or group feedback meeting, to collect feedback on their project. Completion of the survey in a timely manner will be expected and appreciated.

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 Abby McCreath  
 Groove With Me

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 Lara Cohn, NPHD Facilitator  
 NPHD

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 Rosemary Ostmann, NPHD Facilitator  
 NPHD

## Final Summary Report – Groove With Me

June 28, 2024

Overview: NPHD facilitators Rosemary Ostmann and Lara Cohn provided communications counsel and media relations support to Abigail (Abby) McCreath, the founder and executive director of Groove With Me, a New York City-based nonprofit youth development organization offering free dance classes, and performance opportunities to attract and engage girls during idle out-of-school hours and build achievement skills to fuel bright futures.

We initially received a response from Abby on our one-on-one consulting form following one of our workshops. Abby said she loved the webinar: "I learned how you landed visibility and utilized it to bring the organizations further. I need to land press again. Groove With Me is an important haven of safety and empowerment in Harlem. With enough awareness we can grow and serve the community even better."

We then invited Abby to be a volunteer participant in our April 16, "Fundraising X Communications Workshop, 'Shark Tank' style" workshop where we could hear how she was currently telling her story. She was seeking counsel on how to reintroduce herself and Groove With Me to national and local media outlets in order to attract new donors, board members, staff and volunteer dance teachers.

### The work focused on:

- Meeting with Abby to discuss her priorities and immediate needs
- Drafting a scope of work that outlined our allocated hours, services, and deliverables
- Meetings with Abby on an ongoing basis to discuss strategy and the most effective and compelling ways to pitch her story, offering advice and encouragement
- Capturing Abby on video in order to help her frame her messages and assist her in telling her story
- Producing a video from the footage of our conversation for her to use in various communications channels such as her website or social media

- Drafting pitches and identifying possible outlets for outreach to raise her visibility
- Pitching Abby and Groove With Me to national media outlets including The Kelly Clarkson Show; securing interest from the producers
- Counseling Abby on production of a one-minute “Hi Kelly” video to share with producers at The Kelly Clarkson Show per their request; sharing examples and key messaging points to hit in the video
- Pitching Groove With Me to a national [NBC show](#) called " *Harlem Globetrotters: Play It Forward* ", as we learned they were looking for charitable organizations to feature on the show
- Participating in numerous calls with show producers to secure Groove With Me’s approval on the series
- Securing an interview for Abby with Smiley News, a news publication that focuses on positive stories, and participating in various meetings regarding filming
- Counseling Abby on video/footage to share with Smiley News
- Counseling on other items, issues/concerns including recommendations for social media posts

Deliverables: Please see materials delivered to Abby attached, including:

- A video we produced for Abby
- “Hi Kelly” video we shared with The Kelly Clarkson Show producers

Results: The following results were garnered for Groove With Me:

- [Smiley News](#) (30,000 followers)
- NBC’s “*Harlem Globetrotters: Play It Forward*” will film Abby and the dancers from Groove With Me’s episode either during or after [the Globetrotters American Dreams Mall](#) residency in NJ, taking place August 16th-25<sup>th</sup>. They asked her to think about what teacher she wants to be in the segment and will be introducing her to other producers coordinating the shoot.
  - The girls from Groove With Me are also being considered to perform during the Harlem Globetrotters residency

- [The Kelly Clarkson Show](#) producers are very interested in having Abby as a guest on the show and said they will be in touch when they are back from summer hiatus the end of August.

Conclusion: We believe that Abby feels more empowered to frame and tell her story. She has lots of good opportunities in the works, including a potential segment on the Today Show for host Hoda Kotb's birthday celebration. These will give her the confidence and boost she needed. We look forward to seeing Groove With Me grow and serve the community even better.

**In Abbys words:**

"Lara! Guess what? and shhhhh! We're going to be on a segment on the Today Show surprising Hoda for her 60 birthday. Your magic is working even outside your pitches!!!!"





May 9, 2024

## JCCGCI The NonProfit Help Desk - Statement of Work **Loving Others in Unity**

### Background

Desirea Harris is in the early stages of establishing a nonprofit organization called Loving Others in Unity (L.O.U.) for young people in junior and high school in the Coney Island neighborhood in Brooklyn, N.Y. L.O.U., named in honor of Desirea's grandmother Louise, is committed to enhancing the quality of life for those in the community. Louise, who passed away 13 years ago, was very important to Desirea, but she was also "everyone's grandmother". Louise would be an ear for many in need of someone to talk to and exemplified the notion that charity begins at home.

L.O.U. is planning to offer a variety of support services to uplift children, build their self-esteem and enhance their essential life skills with the goal of giving them the confidence and knowledge base to be successful and accomplished adults. Services may include a "dress for success" type program, where gently used clothing and accessories are made available for school or interviews; free haircuts and styling; financial literacy training; and a friendly ear and mentorship type of program to support the youth through difficult times.

Desirea, or 'Auntie Jazzy' as the kids know her, is a local stylist at the Mane Attraction hair salon where she started as a shampoo girl. A friendly fixture in her community she played basketball and was raised by a single mom. While she hasn't officially launched L.O.U., she already offers support to young adults in her community. In her spare time, she teaches classes for students on hygiene, cosmetology, hair styling and cooking. Many of the children she teaches lack self-love and she is hoping to steer them onto the right path, away from crime and give them other options.

Currently, she is planning to help some students shop and get ready for prom. These students were chosen from essays they wrote on their community and plans for their future. This activity could serve as a good media opportunity to introduce L.O.U's .

### Services

The NonProfit HelpDesk's Rosemary Ostmann and Lara Cohn will provide communications support and advice to Desirea. The work will focus on the most effective and compelling ways to present herself and speak about L.O.U to future donors, volunteers, staff, parents, partners, as well as council members and the media.



Deliverables

Upon approval of the SOW, Rosemary and Lara will connect with Desirea in order to gather all information and materials needed and answer any additional questions. From there, we will help her draft her origin story and key messages, tapping into her inspiration, Louise. We will also offer feedback on the website and advice for social media channels. Additionally, we can also pitch the prom story to a local media outlet, based on student/family approval.


As an outcome of the communications counsel, Desirea will feel empowered to frame and pitch her story to stakeholders. A brief final report summarizing the work will be prepared by Rosemary and Lara with input from Desirea.

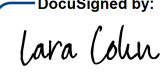
Timing and Hours

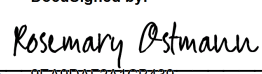
We anticipate the majority of the work for the announcement wrapping up by June 15, 2024. It is estimated that the work described above will require approximately 20 hours of consulting time.

It Is Understood That:

1. Through The NonProfit Help Desk, Rosemary Ostmann and Lara Cohn will provide communications consulting at no cost to L.O.U. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. GWM will make every effort to participate fully in the consulting process, including meetings scheduled to accommodate everyone’s calendar. Participants will take responsibility for early notice in case their calendar changes and a meeting needs to be rescheduled. Additionally, any follow-up ‘homework’ assigned by the communications consultant will be completed and submitted as requested.
3. In mid-June, Desirea will be asked to complete a short survey and/or participate in an individual or group feedback meeting, to collect feedback on their project. Completion of the survey in a timely manner will be expected and appreciated.

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 Desirea Harris  
 Loving Others in Unity

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 Lara Cohn, NPHD Facilitator  
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 Rosemary Ostmann, NPHD Facilitator  
 NPHD

## Final Summary Report – Loving Others in Unity (L.O.U.)

June 28, 2024

Overview: NPHD facilitators Rosemary Ostmann and Lara Cohn provided communications support and advice to Desirea Harris, the founder of a nonprofit organization called Loving Others in Unity (L.O.U.) for young people in junior and high school in the Coney Island neighborhood in Brooklyn, N.Y. L.O.U., named in honor of Desirea’s grandmother Louise, is committed to enhancing the quality of life for those in the community. Louise, who passed away 13 years ago, was very important to Desirea, but she was also “everyone’s grandmother”. Louise would be an ear for many in need of someone to talk to and exemplified the notion that charity begins at home.

Desirea is still in the planning stages of launching L.O.U. and had mockup of the website she was working on. On our intake call she told us she was planning to help some students shop and get ready for prom. These students were chosen from essays they wrote on their community and plans for their future. We believed this activity could serve as a good media opportunity to introduce L.O.U.

### The work focused on:

- Meetings with Desirea to help her focus on the most effective and compelling ways to present herself and speak about L.O.U.’s origin story
- Capturing Desirea on video telling L.O.U.’s story that she posted to her website and can use in social media channels in the future
- Offering feedback and recommended edits to the website content and layout
- Sharing examples of permission slip forms to have students sign if they are interviewed at the prom experience
- Drafting a media alert for the prom experience
- Researching local media outlets in Brooklyn
- Pitching the prom experience to local media outlets in Brooklyn as well as an editor at People magazine
- Securing interest from the Brooklyn Reader news outlet, who could not attend the prom experience but requested photos. Counseled Desirea to follow up with the reporter.
- Securing an interview for Desirea with Smiley News, a news publication that focuses on positive stories, and participating in various meetings regarding filming

- Counseling Desirea on video/footage to share with Smiley News from the prom event
- Counseling on other items, issues/concerns including recommendations for social media channels

Deliverables: Please see materials delivered to Desirea attached, including:

- [Video](#) on L.O.U's website
- Media alert

Results: The following results were garnered for L.O.U.:

- [Smiley News](#) (30,000 followers)
- Desirea has shared video with the producers from the prom event and she is filming herself answering questions they sent her. Producer is following up and will edit the piece. It should be up on the site this summer.

Conclusion: Following our work with Desirea, we believe she feels more empowered to frame and pitch her story to stakeholders. She is just in the beginning stages and we look forward to seeing where she will go from here. We hope our guidance regarding her website content and how she is speaking about and introducing people to L.O.U, added value and gave her the boost she needed as she builds her new nonprofit and lets the community know about her good work.

**In Desirea's words:**

“Good Morning Lara!!! Thank you all so much for all the assistance making this event possible and helping me get to this point. I am so grateful. I was just going through the videos I have in my phone, so I'll definitely be sending everyone everything I have in my phone today. Hopefully I'll have the professional content by tomorrow. It was so great working with you. Again, thank you so much and L.O.U. Thanks you so much as well. You've given us a lot of confidence ☐

The kids were so excited.”

**Final Summary Report**  
**Office Hour Project – Lucy Antoine/Dynamic Duo**  
**June 28, 2024**

Lucy Antoine applied for a consultation with NPHD facilitators Rosemary Ostmann and Lara Cohn after attending our spring workshop. We invited her to be a volunteer participant in our April 16, “Fundraising X Communications Workshop, ‘Shark Tank’ style” where we could hear a little bit more about her and her son Dylan’s story and the mission of her organization.

We did a separate intake call with her to review what her immediate needs were so that we could put together our scope of work, outlining our hours, deliverables, timing, etc.

During our call, we learned she was not sure of her plans for nonprofit status and was in the process of opening a daycare facility as an LLC and will also open a consulting firm called the Dynamic Duo. We let her know NPHD services are only available to nonprofits and she should get back in touch when she’s ready to pursue nonprofit status. However, we did send her a summary of our call and some of our thoughts and ideas we discussed.

We also recommend she reach out to Jill Mendelson who could help her with any legal questions and counseling her on her next steps, if she does decide to go down the nonprofit route.

**In Lucy’s words:**

“I have been connecting with Lara & team. Your team is super supportive and I appreciated their support. However, at the time I connected with them I didn’t know which route to go. I wanted to open up a non-profit and consulting firm. I chose the consulting route as I believe if I’m a nonprofit, I have to rely on donations and I’m afraid I may not get people or organizations to invest in my nonprofit. Your guidance and suggestions are greatly appreciated.”



4/29/24

## JCCGCI The Nonprofit HelpDesk - Statement of Work Washington Heights Y / Leadership Development

### **Background**

Scott Taylor recently joined the Washington Heights Y as director of programming. Staff at the level below are talented, but have never had any management or leadership training. Scott believes that a leadership development program of some kind sort the potential to improve the effectiveness of the group overall, and of the individuals within it.

### **Services**

The Nonprofit HelpDesk's Linda Rich will work with Scott to consider the overall leadership development effort for managers in the program staff at the Washington Heights Y. Linda will deliver 1 session of the program, focused on Coaching Skills, in-person at the Y.

Linda will also provide limited consulting around related topics, such as creating a pre-program survey and providing input into the design of leadership competencies or assessment tools for this group.

The goal is to increase participants' shared understanding of leadership, and their ability to perform leadership tasks more effectively so that they may more fully inhabit their roles as leaders. Increased individual leadership effectiveness and team cohesion will result in greater success for the team and for the organization as a whole.

### **Deliverables**

Linda will assist in designing the overall program, deliver one in-person workshop, and will provide limited consulting around the topics mentioned above. Remaining offerings are to be determined by participants' needs and the timing of the Y's summer programs.

### **Timing and Hours**



Linda's workshop takes place in mid-April. Limited consulting will be provided in April and May.

It is estimated that the work described above will require approximately 5-7 hours of consulting time. In addition to delivery, this covers preparation, research, materials development, follow-up, client communication, and drafting and revising this document.



**It Is Understood That:**

1. Through The Nonprofit HelpDesk, Linda Rich will provide leadership development consulting at no cost to the Washington Heights Y. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. Consultant and client will make every effort to participate fully in the sessions. Client will ensure that designated participants attend the session.
3. In late-June, participants may be asked to complete a short survey and/or participate in an individual or group meeting, to collect feedback on their project. Completion of the survey in a timely manner will be expected and appreciated.

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<p>DocuSigned by:    <small>E74C58EA77A6442...</small>          Linda Rich, Leadership Consultant          The Nonprofit HelpDesk</p>	<p>5/30/2024  <hr style="width: 100%; border: 0.5px solid black;"/>         date</p>

**JCCGCI Non Profit Help Desk and  
Education for New Americans  
Statement of Work  
Nonprofit Tax-Exempt Status**

Yisroel Schulman will represent the NonProfit HelpDesk in providing legal assistance as follows:

- (1) Review of existing NYS incorporation documents.
- (2) Obtain Federal EIN.
- (3) Prepare corporate documents: Bylaws, Conflict of Interest Policy; Whistleblower Policy, banking, and the initial Board Resolutions (need to know who will be the Officers of the non-profit – can be the same as the directors).
- (4) Prepare and submit IRS 501(c)3 Short Form Application.
- (5) Prepare and submit NYS Sales Tax Exemption Application.
- (6) Register the non-profit with the NYS Charities Bureau.

Ossie will provide all necessary information to Yisroel and will make arrangements with him regarding payment of the filing fee for tax exempt status using Form 1023, which is for organizations that expect to raise more than \$50,000 in their starting years.

Yisroel will keep Ozzie updated on the status of his work, and Ozzie will review relevant documents on a timely basis and provide input as requested by Yisroel.

**Confidentiality**

Legal guidance will be provided on a confidential basis and information obtained during the consultative process will not be disclosed. Attorney Yisroel Schulman has access to support from NonProfit HelpDesk colleagues and may share information with them for these purposes only.

**Timing and Hours**

5 hours are estimated for Yisroel to complete this project. In no case will the timeline extend beyond June 30, 2024.

**It is Understood**

1. Through the Non Profit Help Desk, Yisroel Schulman will provide legal services at no cost. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. In mid-June, NPHD may ask its clients to complete a short survey and/or participate in an individual or group meeting, to collect feedback on their project. Participation in this process will be expected and appreciated.



**JCCGCI Non Profit Help Desk and  
Aimasai: Making Moments Matter  
Statement of Work  
Nonprofit Tax-Exempt Status**

Yisroel Schulman will represent the NonProfit HelpDesk in providing legal assistance as follows:

- (1) Incorporation as a NYS non-profit corporation (need the name of the proposed corporation, address of corporation; and names and addresses of a minimum of 3 directors).
- (2) Research to confirm what actions will be needed to incorporate in California, as well.
- (3) Obtain Federal EIN.
- (4) Prepare corporate documents: Bylaws, Conflict of Interest Policy; Whistleblower Policy and the initial Board Resolutions (need to know who will be the Officers of the non-profit. who can be the same as the directors).
- (5) Prepare and submit IRS 501(c)3 Short Form Application.
- (6) Prepare and submit NYS Sales Tax Exemption Application.
- (7) Register the non-profit with the NYS Charities Bureau.
- (8) As feasible, either directly provide or advise regarding requirements in the state of California.

Yaffa will provide all necessary information to Yisroel (see above), as well as a mission statement for the nonprofit, Making Moments Matter, and will make arrangements with Yisroel regarding payment of the filing fees. Yisroel will keep Yaffa updated on the status of his work, and Yaffa will review relevant documents on a timely basis and provide input as requested by Yisroel.

Filing fees required to complete the above process in New York State will be the responsibility of Yaffa, as was discussed, and arrangements will be made with Yisroel to cover this expense. Fees are estimated as follows: \$135 NYS Incorporation, \$275 Federal Tax-Exempt Status. As more information about requirements in California are learned, additional filing fees may need to be incurred.

**Confidentiality**

Legal guidance will be provided on a confidential basis and information obtained during the consultative process will not be disclosed. Attorney Yisroel Schulman has access to support from NonProfit HelpDesk colleagues and may share information with them for these purposes only.

### **Timing and Hours**

6 hours are estimated for Yisroel to complete this project. In no case will the timeline extend beyond June 30, 2024.

### **It is Understood**

1. Through the Non Profit Help Desk, Yisroel Schulman will provide legal services at no cost. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. In mid-June, NPHD may ask its clients to complete a short survey and/or participate in an individual or group meeting, to collect feedback on their project. Participation in this process will be expected and appreciated.

**JCCGCI Non Profit Help Desk and Ludy Shaw  
Statement of Work  
Nonprofit Tax-Exempt Status**

**BACKGROUND**

Ludy Shaw wants to establish a tax-exempt nonprofit to provide consulting services to entrepreneurs and change agents in New York who are contributing to the vitality of the city and making a difference for the community.

In a Zoom call on February 1st with NPHD Director Jill Mendelson and NPHD Legal Specialist Yisroel Schulman, the process of securing tax-exempt status was reviewed, expenses for filing were discussed, and Ludy made a decision to move forward with the 1023-EZ form, which was created for smaller organizations that wish to apply for federal tax-exempt status under IRS Section 501(c)3, and anticipate receiving \$50,000 or less in annual gross receipts over the first three years. This form typically is less time consuming and the approval process goes faster.

**Services to be provided by the Non Profit Help Desk**

Yisroel Schulman will provide legal assistance as follows:

- (1) Incorporation as a NYS non-profit corporation (need the name of the proposed corporation, address of corporation; and names and addresses of a minimum of 3 directors).
- (2) Obtain Federal EIN.
- (3) Prepare corporate documents: Bylaws, Conflict of Interest Policy; Whistleblower Policy and the initial Board Resolutions (need to know who will be the Officers of the non-profit. who can be the same as the directors).
- (4) Prepare and submit IRS 501(c)3 Short Form Application.
- (5) Prepare and submit NYS Sales Tax Exemption Application.
- (6) Register the non-profit with the NYS Charities Bureau.

Ludy will provide all necessary information to Yisroel (see above), as well as a mission statement for her nonprofit, and will make arrangements with Yisroel regarding payment of the filing fees. Yisroel will keep Ludy updated on the status of his work, and Ludy will review relevant documents on a timely basis and provide input as requested by Yisroel.

Filing fees required to complete the above process will be the responsibility of Ludy, as was discussed, and arrangements will be made with Yisroel to cover this expense. Fees are estimated as follows: \$135 NYS Incorporation, \$275 Federal Tax-Exempt Status.

### **Confidentiality**

Legal guidance will be provided on a confidential basis and information obtained during the consultative process will not be disclosed. Attorney Yisroel Schulman has access to support from NonProfit HelpDesk colleagues and may share information with them for these purposes only.

### **Timing and Hours**

6 hours are estimated for Yisroel to complete this project. In no case will the timeline extend beyond June 30, 2024.

### **It is Understood**

1. Through the Non Profit Help Desk, Yisroel Schulman will provide legal services at no cost. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. In mid-June, NPHD may ask its clients to complete a short survey and/or participate in an individual or group meeting, to collect feedback on their project. Participation in this process will be expected and appreciated.

**JCCGCI Non Profit Help Desk and  
Spring Forward  
Statement of Work  
Nonprofit Tax-Exempt Status**

**BACKGROUND**

Cynthia Jean is a licensed social worker in private practice and a breast cancer survivor. Motivated by her experience, and the knowledge that many women (and men) who contract the disease don't have access to the best medical guidance and treatments, she established a program to support women at various stages of their cancer journey and help them navigate through the process. She provides education on breast cancer early detection and treatment. In addition, she helps survivors with post-treatment health and wellness. She offers a 3-part workshop called Tears, Treatment, & Triumph where she discusses her journey to becoming cancer free. Cynthia also hosts events such as an annual Sweat Fete Pink Awareness and The Pink & Pearls Brunch in support of women's health.

There is growing demand for her counseling and programs on behalf of women with breast cancer. As a result, Cynthia has decided to establish a non-profit organization where she can channel most of her work in the community, and she will join another private social work practice to be able to continue her counseling work as an independent professional. The two entities will be maintained very separately, and the non-profit will not serve as a vehicle for client development for her private practice.

In a Zoom call today with NPHD Director Jill Mendelson and NPHD Legal Specialist Yisroel Schulman, the process of securing tax-exempt status was reviewed, expenses for filing were discussed, and Cynthia made a decision to move forward with the 1023-EZ form, which was created for smaller organizations that wish to apply for federal tax-exempt status under IRS Section 501(c)(3), and anticipate receiving \$50,000 or less in annual gross receipts. This form typically is less time consuming and the approval process goes faster. This is important to Cynthia, as she is hoping to apply for NYC Discretionary Funds for FY2025, and applications for this type of funding are made available in early January with a deadline of mid-to-late February. If, in the future, she is able to generate more than \$50,000 a year in funding, she can be reclassified by filing updated documents.

**Services to be Provided by the Non Profit Help Desk**

Yisroel Schulman, will provide legal assistance to Cynthia Jean as follows:

- (1) Incorporation as a NYS non-profit corporation (need the name of the proposed corporation, address of corporation; and names and addresses of a minimum of 3 directors).
- (2) Obtain Federal EIN;

- (3) Prepare corporate documents: Bylaws, Conflict of Interest Policy; Whistleblower Policy and the initial Board Resolutions (need to know who will be the Officers of the non-profit. who can be the same as the directors);
- (1) 4) Prepare and submit IRS 501(c)(3) Short Form Application;
- (2) 5) Prepare and submit NYS Sales Tax Exemption Application; and
- (3) 6) Register the non-profit with the NYS Charities Bureau.

Cynthia will provide all necessary information to Yisroel (see above), and will make arrangements with Yisroel regarding payment of the filing fees.. Yisroel will keep Cynthia updated on the status of his work, and Cynthia will review relevant documents on a timely basis and provide input as requested by Yisroel.

Filing fees required to complete the above process will be the responsibility of Cynthia, as was discussed, and arrangements will be made with Yisroel to cover this expense. Fees are estimated as follows: \$135 NYS Incorporation, \$275 Federal Tax-Exempt Status.

#### **Confidentiality**

Legal guidance will be provided on a confidential basis and information obtained during the consultative process will not be disclosed. Attorney Yisroel Schulman has access to support from NonProfit HelpDesk colleagues and may share information with them for these purposes only.

#### **Timing and Hours**

6 hours are estimated for Yisroel to complete this project. In no case will the timeline extend beyond June 30, 2024.

#### **It is Understood**

Through the Non Profit Help Desk, Yisroel Schulman will provide legal services at no cost. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.

In mid-June, NPHD may ask its clients to complete a short survey and/or participate in an individual or group meeting, to collect feedback on their project. Participation in this process will be expected and appreciated.

**JCCGCI Non Profit Help Desk and  
Vanity Beauty Bar  
Statement of Work  
Nonprofit Tax-Exempt Status**

**BACKGROUND**

Patrick Celestin established a company, Vanity Beauty Bar, LLC, that he wants to convert to a nonprofit training center. Its purpose will be to train aspiring nail salon specialists and help them become licensed nail technicians. At the same time, the program will support local economic development and new jobs in the community. The training will include a combination of skill development, industry knowledge, and professional growth for participants. A substantial grant application that included a budget presentation was developed by Patrick to introduce the initiative, and he has already secured several letters of recommendation.

In a Zoom call on January 29th with NPHD Director Jill Mendelson and NPHD Legal Specialist Yisroel Schulman, the process of securing tax-exempt status was reviewed, expenses for filing were discussed, and Patrick made a decision to move forward with the 1023-EZ form, which was created for smaller organizations that wish to apply for federal tax-exempt status under IRS Section 501(c)(3), and anticipate receiving \$50,000 or less in annual gross receipts over the first three years. This form typically is less time consuming and the approval process goes faster. We discussed Patrick's ultimate goal of raising about \$270,000 to support the training center, at which time he will need to submit a second form to the IRS and be reclassified.

**Services to be Provided by the Non Profit Help Desk**

Yisroel Schulman will provide legal assistance to Patrick Celestin as follows:

- (1) Incorporation as a NYS non-profit corporation (need the name of the proposed corporation, address of corporation; and names and addresses of a minimum of 3 directors).
- (2) Obtain Federal EIN.
- (3) Prepare corporate documents: Bylaws, Conflict of Interest Policy; Whistleblower Policy and the initial Board Resolutions (need to know who will be the Officers of the non-profit. who can be the same as the directors).
- (4) Prepare and submit IRS 501(c)(3) Short Form Application.
- (5) Prepare and submit NYS Sales Tax Exemption Application.
- (6) Register the non-profit with the NYS Charities Bureau.

Patrick will provide all necessary information to Yisroel (see above), and will make arrangements with Yisroel regarding payment of the filing fees. Yisroel will keep Patrick

updated on the status of his work, and Patrick will review relevant documents on a timely basis and provide input as requested by Yisroel.

Filing fees required to complete the above process will be the responsibility of Patrick, as was discussed, and arrangements will be made with Yisroel to cover this expense. Fees are estimated as follows: \$135 NYS Incorporation, \$275 Federal Tax-Exempt Status.

### **Confidentiality**

Legal guidance will be provided on a confidential basis and information obtained during the consultative process will not be disclosed. Attorney Yisroel Schulman has access to support from NonProfit HelpDesk colleagues and may share information with them for these purposes only.

### **Timing and Hours**

6 hours are estimated for Yisroel to complete this project. In no case will the timeline extend beyond June 30, 2024.

### **It is Understood**

1. Through the Non Profit Help Desk, Yisroel Schulman will provide legal services at no cost. Funding for this service is being provided by the NYC Council through its Discretionary Funds Program.
2. In mid-June, NPHD may ask its clients to complete a short survey and/or participate in an individual or group meeting, to collect feedback on their project. Participation in this process will be expected and appreciated.



Amy Fiore  
Office Hours  
One on One Consultations

<p><b><u>The Curly Code</u></b></p>	<p>The Curly Code is a natural hair community that teaches Black girls ages 16-24 about all things beauty—encouraging them to love and care for their hair and skin. We take a student-centered approach to our college and career programming, meeting students at their beauty interests, building trust and community, and creating a safe space to learn about college admissions and post-graduate career paths. The Curly Code is where Curls, College, and careers collide to provide a rigorous curriculum that brings education to life through interactive programming.</p> <p><b>Exec Summary:</b></p> <ul style="list-style-type: none"> <li>• <b>Assessed materials they have created</b></li> <li>• <b>Drafted new versions</b></li> <li>• <b>Discussed budget formats</b></li> <li>• <a href="#">Final work products here</a></li> </ul>
<p><b><u>The Childcare Hub</u></b></p>	<p>The Childcare Hub is not just an organization; it's a beacon of support and empowerment for family childcare providers in NYC, specifically The Bronx. Their mission is to support family daycare providers by equipping them with the necessary tools and resources to enhance their program and provide high-quality care to the children and families they serve. They believe that by offering comprehensive business training, coaching, and mental health services in their native language, they can empower family daycare providers to create nurturing environments and promote early childhood development within their communities. This will aim to reduce the number of program closures and alleviate providers</p> <p><b>Exec Summary:</b></p> <ul style="list-style-type: none"> <li>• <b>Assessed materials she has created</b></li> <li>• <b>Drafted new LOI</b></li> <li>• <b>Final work products <a href="#">here</a></b></li> </ul>

<p><u>Training for Life</u></p>	<p>This organization is dedicated to "Empowering Individuals &amp; Communities Through Education &amp; Training and thereby Increasing the Quality &amp; Quantity of Life."</p> <p><b>Exec Summary:</b></p> <ul style="list-style-type: none"> <li>• <b>Assessed materials provided</b></li> <li>• <b>Drafted new LOI</b></li> <li>• <b>Final work products <a href="#">here</a></b></li> </ul>
<p><u>Center For Hope Services</u></p>	<p>This is organization offer programs such as older adult services, basic life support certification, a pre-loved shop, community giveaways, and PPE distribution. Their mission is to create systemic, sustainable change by addressing root causes and fostering community collaboration, ensuring everyone has the opportunity to thrive.</p> <p><b>Exec Summary:</b></p> <ul style="list-style-type: none"> <li>• <b>Assessed materials and provided feedback</b></li> </ul>
<p><u>NJ Alliance</u></p>	<p>The Alliance for Community Empowerment in New Jersey works to inspire hope, cultivate resources, and provide effective services that empower communities to thrive and achieve long-term change. Their initiatives focus on supporting domestic violence victims, bridging community needs, nurturing potential through economic development, and providing access to essential resources for youth and children. They also host events like coat giveaways and holiday boutiques to support the community.</p> <p><b>Exec Summary:</b></p> <ul style="list-style-type: none"> <li>• <b>Assessed materials and provided feedback</b></li> <li>• <b>Talked through how to narrow focus, at least to start, so they have demonstrable success to build upon.</b></li> <li>• <b>Will introduce June to Northwest Developers trying to the same kind of work</b></li> </ul>

**Gianna Effect Foundation**

The Gianna Effect Foundation is a nonprofit 501(c)(3) organization that aims to shine a light on the difficult journey families face when their child is diagnosed with a rare pediatric cancer (such as osteosarcoma). They aspire to brighten the days ahead by providing joy to children who are undergoing intense treatment, and monetary assistance to parents burdened with financial stress so that they can focus on valuable family time. They hold events to raise awareness for pediatric cancer and raise money for not only families with loved ones who are battling pediatric cancer but for research as well as local hospitals such as MSK. They received a \$5000 award for FY 2024 Coaching/Leadership – Discretionary. They hold many events throughout the year for pediatric cancer and just want to clarify and help design an event that the council members award can be used to help fund. Would like to go over past events to see what part of any would have met the criteria as well as new ideas and how to format them to meet the guidelines to maximize the award to spread pediatric cancer awareness.

**Exec Summary:**

- **Asked about discretionary funding restrictions and reporting processes. Talked them through how to find gift on Schedule C, how to prepare for reporting and how to maintain relationship with council member.**

Boris K  
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One on One Consultations

## Daycare Council

The Daycare Council, including Boris, Erika, Tara, and Gregory, discussed a potential website redesign and branding strategy to engage donors and partners, with Boris suggesting improvements for user engagement, emphasizing storytelling and content alignment, and addressing technical issues like broken links, subdomains, and PDF reports.

### Keywords

🔗 Engagement ↔ Broken Links 📄 Storytelling 🏢 Branding

### Agenda

- **Engaging Donors and Partners**
- Erika expressed concerns about engaging not only members but also donors through an improved website presence. She mentioned the importance of dynamic websites in attracting potential supporters like Mackenzie Bezos.
- **Improving User Experience**
- Boris emphasized the need for a more engaging homepage with clear mission statements or taglines to instantly convey the organization's purpose. He also recommended converting PDF reports into blog posts for better accessibility.
- **User Engagement and Storytelling**
- Boris stressed the significance of crafting a compelling narrative to engage different user avatars effectively. He recommended aligning content with their needs to guide them through their journey on the website.
- **Website Redesign Feedback**
- Boris provided detailed feedback on the current website design of the Daycare Council. He highlighted issues with clarity of mission statement, visual appeal, user engagement elements like sliders and PDFs.
- **Technical Improvements**
- Feedback was provided on technical aspects such as broken links and subdomains that could impact user experience negatively. Suggestions were made for integrating job board functionality seamlessly within the site.

- **Content Organization**
- The need for better organization of content, including reports in a more accessible format than PDFs was highlighted to improve usability for visitors.

## Completed actions

- Further assessment is required to address technical limitations related to PDF report accessibility while considering resource availability for implementing changes promptly.
- Acknowledged that addressing these aspects would require time and resource allocation but recognized their critical role in enhancing overall website effectiveness.
- The team has acknowledged the need for immediate improvements in user engagement elements such as mission statement visibility and event listings.
- Identified potential areas for improvement related to storytelling, technical enhancements, and content accessibility.

## Action items

- Consider integrating job board functionality directly into the website rather than redirecting users to external platforms.
- Explore options for presenting reports in a more accessible format within the website's structure.
- Enhance event listings on the website by providing clear summaries and registration options.
- Conduct a thorough review of broken links using an SEO tool like Screaming Frog.
- Revise homepage layout to prominently feature mission statements or taglines.
- Convert PDF reports into blog posts for improved accessibility.

## Blocking points

- Difficulty in accessing important resources like reports due to reliance on PDF formats may impede effective communication with stakeholders.

- Lack of clear storytelling and content organization could lead to high bounce rates and reduced visitor engagement.
  - Technical issues such as broken links and subdomain usage may hinder optimal user experience.
  - Potential resource constraints for implementing immediate changes based on feedback.
  - Technical limitations regarding PDF report accessibility on the current website.
-

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## Dorie Miller Post



Boris, Lynn, and Michael discussed the need for professional help to restructure the American Legion's website, focusing on user engagement, content management transition to WordPress, and catering to different user groups, while considering the process and cost implications for the non-profit organization.

### Keywords

🗄 Content Management System (CMS) 👤 User-Friendly Site ❤️ Non-Profit Organization 🗣 User Engagement

### Agenda

- **Website Restructuring**
- The conversation focused on improving the website's design and user engagement by making it more modern and interactive. Boris emphasized the need for a CMS like WordPress to allow flexibility in managing content.
- **Content Categorization**
- They discussed tagging blog posts with categories like American Legion news and community news, emphasizing the importance of filtering content for specific audiences.
- **User-Friendly Design**
- They discussed enhancing user experience by providing clear information about the organization's location and activities through images and concise text.
- **Transition to CMS**
- Boris recommended transitioning to a CMS like WordPress for better control over site features, appearance, and interactivity.
- **Avatar Segmentation**
- They explored segmenting avatars such as veterans and community donors, highlighting the need to organize content tailored to each group's needs.
- **Technical Challenges**

- The participants expressed their limitations in navigating and updating the current website due to its complexity, leading them to seek professional assistance.
- **Website Revamp Cost**
- Boris mentioned that the cost for revamping a website for non-profits ranges from \$3500 to \$15000 depending on complexity.
- **Proposal Creation**
- Michaeldrummond emphasized the need for a proposal to present to their commander before moving forward with the project.
- **WordPress as an Option**  
Boris proposed using WordPress due to its extensibility and ease of use.

### Completed actions

- The conversation highlighted the need for external expertise in redeveloping the website structure based on defined storytelling goals and avatar segmentation strategies, but no concrete actions or decisions were made during this discussion due to time constraints and technical limitations of team members involved.
- The discussion highlighted key areas where improvements are needed in terms of design, user engagement, and backend management of the website for the American Legion organization.

### Action items

- Revise website content with concise information, images of activities, and clear location details.
- Define clear storytelling goals and avatar segmentation for website content.
- Send over itemized details about what needs to be done in the website revamp.
- Explore options for developing a more user-friendly website platform.
- Schedule meetings with a professional web developer or consultant.
- Consolidate news sections on the website for better organization.
- Explore transitioning to a more flexible CMS like WordPress.



## Blocking points

- Needing approval from their commander before proceeding with any significant decisions or actions regarding the website revamp.
  - Time constraints affecting the ability to dedicate sufficient time towards restructuring the website.
  - Lack of flexibility in managing current website content due to limitations of existing platform.
  - Delay in updating website with relevant photos due to unavailability from responsible parties.
  - Lack of clarity on how much investment is needed for site improvements.
  - Limited technical expertise of current team members.
-

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## Renaissance Schools

### **Meredith Hinshaw-Chaney**

Rescheduled first appointment (Tues Jan 30).

Boris and Meredith discussed the challenges of their nonprofit charter school's website, considering a separate site for fundraising, improving user experience, content organization, and audience targeting, and contemplating hiring an outside firm for assistance, with Boris suggesting specific strategies and tools for enhancement.

### **Keywords**

Charter School, Landing Page, User Experience Improvement, Fundraising

### **Agenda**

#### **Website Development**

The conversation focused on the challenges of using an existing website to fundraise for a nonprofit charter school. Meredith expressed concerns about the current website's ability to effectively target different audiences and convey the school's story.

#### **User Experience & Content Organization**

Boris suggested structuring the website to cater to different avatars (audiences) such as prospective families, donors, and charter authorizers. They discussed separating content for each school under an umbrella parent organization while maintaining donation functionality on both levels.

#### **Fundraising Strategy**

The conversation highlighted the need to streamline user experience based on different users' needs, improve call-to-action elements for donations, and address compliance requirements from charter authorizers.

#### **Website Design Feedback**

Boris provided feedback on improving the school's website by suggesting a more compelling landing section with clearer call-to-action buttons and a calmer visual design.

#### **Professional Photos and Updated Stats**

The conversation highlighted the importance of professional photos and updated statistics to enhance the website's appeal to prospective parents.

### **Consideration of Hiring Outside Firm**

There was discussion about potentially hiring an outside firm to assist with implementing necessary improvements due to resource constraints.

### **Website Design and Functionality**

Boris discussed the use of the Google language extension to improve accessibility on websites. He also highlighted the benefits of using Divi as a preferred platform due to its flexibility in customization.

### **Platform Comparison - Squarespace vs. WordPress**

Boris emphasized the limitations of Squarespace compared to WordPress in terms of customization options and ecosystem support.

### **User Experience Improvement**

Suggestions were made for integrating better call-to-action strategies such as implementing RSVP banners and donation functionalities to enhance user engagement.

### **Assessment**

- The discussion provided valuable insights into potential strategies for improving their web presence's effectiveness in fundraising efforts while addressing compliance requirements from charter authorizers.
- The conversation led to identifying key areas requiring improvement in the school's website design such as creating a more engaging landing page, obtaining professional photos, updating statistics while considering external assistance due to resource limitations.
- Identified immediate tweaks that can be implemented on the website
- Explored potential solutions for enhancing user engagement through improved call-to-action strategies
- Discussed future collaboration opportunities for website development with Boris

### **Action Items**

- Develop a clear strategy for storytelling on the website that targets various audiences effectively.
- Consider restructuring the website by creating separate sections or subdomains tailored to specific avatars (prospective families, donors).

- Improve user experience by refining navigation cues and call-to-action elements related to fundraising.
- Revamp landing section with clear call-to-action buttons
- Obtain professional photos and update statistics
- Consider hiring an outside firm for assistance
- Implement Google language extension for improved accessibility
- Consider transitioning website development from Squarespace to Divi or WordPress
- Integrate better call-to-action strategies such as RSVP banners and donation functionalities

### **Blocking Points**

- Limited resources available for redesigning the current website.
  - Challenges in presenting a cohesive story while addressing diverse audience needs.
  - Technical glitches affecting user interaction with certain features of the site.
  - Resource constraints preventing immediate implementation of suggested improvements
  - Need for significant time investment in revamping various aspects of the website
  - Limitations in current website functionality
  - Reluctance towards investing in certain platforms due to potential undermining efforts
-

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One on One Consultations

## Haven Midwifery

Trinisha Williams

### Keywords

 Donor Avatars,  Storytelling,  Digital Marketing Tools,  Fundraising Campaign

### Agenda

#### CRM System Selection

Trinisha seeks a user-friendly and cost-effective CRM system for donor management while considering data security and export capabilities.

#### Recommended Platforms

Boris recommended several CRM platforms including Give Lively (free), Classy (with high fees), Neon (less expensive but with limitations), Salsa Engage (feature-rich), and Little Green Light (smaller and less expensive).

#### Storytelling in Fundraising

The conversation emphasized the importance of storytelling in fundraising campaigns to engage donors effectively.

#### Donor Avatars

Trinisha seeks clarity on identifying potential donors and their capacity to give. Boris advises using software to manage donors effectively and categorize them based on their giving capacity.

#### Expanding Donor Base

Boris suggests launching a capital campaign targeting existing donors with personalized stories and testimonials while also exploring outreach to new potential supporters through LinkedIn connections.

#### Digital Marketing Tools

Boris discusses leveraging Google Ads grants for nonprofits, creating engaging email campaigns, and hosting webinars or events as strategies to engage current supporters and attract new ones.

## Assessment

Assessment of various CRM platforms was completed during the conversation along with initial considerations regarding storytelling strategies for fundraising efforts.

Boris provided valuable insights into refining the organization's story, managing current donors effectively, expanding the supporter base through targeted campaigns, leveraging digital marketing tools like Google Ads grants, email campaigns, webinars/events while addressing financial constraints creatively.

## Action Items

- Explore the recommended CRM platforms such as Give Lively, Classy, Neon, Salsa Engage, and Little Green Light.
- Assess the storytelling strategy for fundraising campaigns to attract different donor avatars effectively.
- Consider options for professional assistance in crafting compelling stories for fundraising efforts.
- Implement a software solution for effective donor management.
- Launch a capital campaign targeting existing donors with personalized stories.
- Explore outreach opportunities through LinkedIn connections.

## Blocking Points

- Limited expertise in marketing strategies specifically tailored to non-profit organizations' needs.
  - Uncertainty about selecting the most suitable platform that aligns with budget constraints while meeting essential requirements like data security.
  - Limited financial resources hindering paid advertising efforts.
  - Inadequate presence affecting event attendance and webinar effectiveness.
-

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## Bala Chabad

Baruch S. Davidson, Jacob Gold

Baruch, Boris, and Jacob discussed including Jacob in a meeting to plan a compelling, narrative-driven website for their synagogue, focusing on creating a unique identity, researching avatars, engaging with various groups, and using interactive storytelling to connect with specific audiences like teenagers.

### Keywords

🌐 Website, 👤 Avatar, 🗂️ Interactive Storytelling, 📅 Meeting

### Agenda

#### Website Organization

The group discussed including Jacob in a meeting to organize a website for their organization. They encountered technical issues but managed to address them.

#### Synagogue Identity

They explored the unique identity of their synagogue within an Orthodox neighborhood, highlighting its vibrant and inclusive nature.

#### Unique Value Proposition

The conversation delved into crafting a compelling story for the organization's website, emphasizing the need to present a unique value proposition that resonates with potential members and donors.

#### Visual Presentation of Narrative Structure

The discussion focused on creating a visual representation of the narrative structure that resonates with the audience without being tacky or overly broad. It emphasized using specific language tailored to avatars and incorporating it into posters for effective communication.

#### Avatar Creation

Boris provided insights into creating avatars by making them specific and unique to resonate with the target audience's problems and values. He stressed understanding constituents well and refining avatars through interactive back-and-forth processes.

## **Assessing Different Groups & Building Relationships**

The conversation delved into understanding different groups within an area and bridging relationships between them. Boris highlighted the importance of identifying pain points in these communities to effectively communicate value propositions for building connections.

## **Personalized Engagement**

The conversation emphasized the importance of crafting personalized narratives to engage specific individuals, such as teenagers in a school community, by addressing their concerns and offering solutions tailored to their needs.

## **Website Structure**

It was discussed that the website should feature an interactive narrative structure with separate pages for different avatars, allowing visitors to choose their own adventure based on their interests or needs.

## **Storytelling Approach**

The approach involved telling complete stories on each page using text and visuals to convey the organization's impact, vision, problem-solving solutions, and reinforcement through testimonials or calls to action.

## **Assessment**

- The group successfully addressed technical challenges during the meeting, allowing for continued discussion about defining their synagogue's unique identity and crafting a compelling narrative for their website based on its distinct value proposition.
- The conversation provided valuable insights into creating visually appealing narratives aligned with targeted audiences' needs.
- Strategies were discussed regarding refining avatar profiles through interactive processes based on constituents' problems and values.
- Further exploration is needed regarding tools available for identifying mode avatars at other institutions as well as assessing average types within community organizations.
- The discussion provided valuable insights into creating engaging narratives for websites targeting specific audience segments while emphasizing an interactive storytelling approach across multiple web pages tailored to individual avatars' needs and interests.



- This report highlights key considerations for implementing these insights into web design strategies aimed at enhancing user engagement through personalized narratives and immersive digital experiences tailored to diverse audience segments within targeted communities.

## Action Items

- Ensure successful inclusion of Jacob in future meetings by addressing technical issues promptly.
- Develop clear messaging on the organization's unique identity and value proposition for use on the website.
- Define target avatars (members, donors) and tailor content accordingly.
- Create a visual representation of the narrative structure that resonates with targeted avatars.
- Utilize interactive processes to refine avatars based on constituents' problems and values.
- Identify pain points in different community groups for effective communication strategies.
- Develop personalized narratives targeting specific avatars like teenagers in school communities.
- Implement an interactive storytelling approach on the website with separate pages for different avatars.
- Incorporate compelling visuals along with text-based storytelling.

## Blocking Points

- Technical difficulties during the meeting disrupted communication flow.
  - Unclear articulation of the organization's unique value proposition may hinder effective storytelling on the website.
  - Lack of clarity on how to assess average types within different community institutions.
  - Uncertainty about tools available for identifying mode avatars at other institutions.
  - Ensuring seamless integration of interactive storytelling elements into web design.
  - Crafting compelling narratives that resonate with diverse audience segments within targeted communities.
-

Boris Kievsky  
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One on One Consultations

## Bala Chabad - Second Session

Baruch Davidson, Jacob Gold

### Keywords

🌐 Website Design, 📖 Learning Resources, 👤 User Experience, 💰 Donation Button Placement

### Agenda

#### Narrative Development

Baruch and Boris worked on a narrative following specific guidelines to capture their vision. They explored different website templates and sought feedback on whether their narrative aligned with the desired vision.

#### Website Design Feedback

Boris emphasized simplifying the website layout to avoid overwhelming visitors with information. He suggested reorganizing content sections and improving visual elements like posters.

#### Homepage Structure

The conversation focused on organizing the homepage content to include vibrant posters at the top followed by log lines and mission statements. It was suggested to introduce programs and learning resources before placing donation buttons.

#### Visual Representation

The discussion focused on how to visually represent the narrative on the website through an inviting poster that encapsulates the organization's mission and values.

#### Website Engagement

They considered ways to engage visitors by showcasing community activities, services, Torah study opportunities, and programs for children.

## **Narrative Structure**

The discussion touched upon breaking down the narrative across different sections of the webpage to effectively communicate key messages.

## **User Experience**

Boris highlighted issues with navigation and clarity in presenting programs and services on the website.

## **Contact Form Clarity**

Boris emphasized the importance of clear contact form placement without making it look contrived or greedy.

## **Vision Statement Positioning**

The vision statement was recommended to be placed after introducing different journeys that users could take with the organization.

## **Completed actions**

- The conversation led to sharing of documents via email for review by Boris as well as gaining insights into potential visual representations such as posters and images depicting community engagement activities at synagogues.
- The conversation led to identifying areas for improvement in website design, particularly focusing on reorganizing content sections for better communication and enhancing user experience through clearer navigation pathways.
- The conversation provided valuable insights into optimizing the layout and content of a WordPress website's homepage for improved user engagement and clarity in communication with visitors.

## **Action items**

- Explore visual elements such as photos from synagogue events for use in representing community engagement.
- Enhance clarity in presenting programs and services for improved user experience.
- Create an inviting poster that encapsulates the organization's mission and values.
- Share the developed narrative document with Boris for feedback.
- Reorganize content sections on the webpage for better flow.
- Improve poster visuals and simplify their presentation.
- Clarify Contact Form Placement
- Reorganize Homepage Content
- Reposition Vision Statement

## Blocking points

- Uncertainty about how to best represent the developed narrative visually on a website or in a poster format.
  - Lack of clarity regarding specific details about Habad's template system capabilities for website design.
  - Lack of clear navigation for accessing specific programs or services.
  - Limitations of current template capabilities in terms of customization.
-

Boris Kievsky  
Office Hours  
One on One Consultations

## Utopia Resource Center Greater New York

Ivy Brown

### Keywords

👤 Workforce Training, 🧒 Early Childhood Development, 🖥 Website Assessment, 🧠♀ Mental Health Support

### Agenda

#### Grant Application

Ivy sought Boris' assistance with a grant application for Utopia Resource Center.

#### Website Assessment

Boris provided feedback on the organization's website, highlighting its visual appeal but suggesting improvements to better convey their story.

#### Mission Statement Alignment

Boris expressed concerns about the alignment of Utopia Resource Center's mission statement with its diverse range of services, particularly in relation to workforce development.

#### Transition from Workforce Development

Ivy discussed her shift from workforce development to focusing on vocational training for daycare openings and addressing developmental delays in children.

#### Website Feedback

Boris provided detailed feedback on improving the clarity of messaging and visuals on Ivy's website to effectively communicate the organization's mission and programs.

#### COVID-19 Impact

The conversation highlighted the need to clearly articulate how Utopia Resource Center addresses challenges arising from the COVID-19 pandemic.

#### Website Review

Boris conducted a thorough analysis of Ivy's website, highlighting issues with event listings, blog content, and overall user experience.

## Web Design Recommendations

He suggested changes such as adding images to event listings, improving blog content visibility, and removing outdated information from the site.

## Branding and Storytelling

Boris emphasized the importance of storytelling in branding to effectively communicate Utopia's mission and services to its target audience.

## Website Structure and Content

The conversation emphasized the importance of clearly identifying avatars and determining where they should go on the website to receive help and take desired actions. It also highlighted the need to consider restructuring content based on user needs.

## Page Builder Tools

The use of Divi as a preferred page builder tool was discussed along with considerations for potential changes in site structure using this tool.

## Incorporating Kits for Children

There was a detailed discussion about integrating kits for children into the website's functionality including generating age-specific information and facilitating communication between parents and specialists.

## Assessment

- The conversation highlighted potential areas for improvement within Utopia Resource Center regarding their mission statement clarity, service focus alignment, and website communication effectiveness.
- Ivy received valuable feedback regarding her organization's focus areas and how they are presented on her website.
- The assessment identified key areas requiring improvement such as program clarity, visual representation, and articulating unique value propositions effectively amidst similar organizations in the sector.
- Boris provided valuable insights into web design best practices while discussing potential future collaboration with Ivy based on her organization's needs.
- The conversation provided valuable insights into potential areas of improvement in structuring web content based on user needs while also highlighting opportunities to integrate child development kits into the site's functionality through age-specific information generation and parent-specialist communication facilitation.

## Action Items

- Revise Mission Statement: Clarify and refine the mission statement to better align with Utopia Resource Center's core activities.
- Website Enhancement: Implement changes on the website to effectively communicate the organization's story and impact.
- Service Focus Evaluation: Assess whether all services offered align closely with Utopia Resource Center's primary mission.
- Revise website content for clearer messaging about programs and services.
- Incorporate visuals that represent Utopia Resource Center's mission effectively.
- Highlight specific strategies for addressing challenges related to COVID-19 impact.
- Revise event listings by adding images and clear call-to-action buttons.
- Enhance blog content by clearly communicating its value to visitors.
- Consider redesigning the logo for better representation of Utopia's mission.
- Conduct a thorough assessment of current website content.
- Consider reshaping services pages to focus more on user benefits.
- Explore options for integrating age-specific kits into the website's functionality.

## Blocking Points

- Misalignment of Activities and Mission Statement
  - Clarity in Communicating Organization's Core Focus
  - Lack of clear articulation of Utopia Resource Center's focus areas may hinder effective communication with potential stakeholders.
  - Inadequate representation of programs through visuals could lead to a lack of understanding among website visitors.
  - Unclear differentiation between services offered by Utopia Resource Center compared to other organizations may affect donor engagement.
  - Limited availability for additional sessions or immediate implementation due to prior commitments.
  - Unclear scope regarding specific changes required on the website.
  - Unclear budget allocation or scope of work may hinder decision-making regarding necessary changes.
  - Need for further clarification on specific requirements related to incorporating child development kits into the site.
-

Boris Kievsky  
Office Hours  
One on One Consultations

## Veronica Arts Media

### Maurita Salkey

Boris and Maurita had a detailed discussion about improving the design, structure, and content of Maurita's nonprofit organization's website to enhance user experience, showcase impact, and attract funding.

### Keywords

🎨 Impactful Design, 🗣️ Storytelling, 💰 Fundraising Strategy, 👤 User Engagement

### Agenda

#### Website Design Feedback

Boris emphasized the importance of storytelling in website design and suggested making the video content less distracting by slowing it down and focusing on its impact on the audience.

#### Tagline and Log Line

Boris recommended refining the tagline to be more specific about the organization's mission and expanding the log line to convey a clear problem-solution narrative.

#### Call-to-Action Optimization

Boris advised reevaluating calls-to-action placement and language to guide visitors through a compelling narrative journey.

#### User Engagement

The conversation emphasized the need to capture visitors' attention quickly by offering enticing content rather than simply asking them to 'learn' or 'donate.' It was suggested that providing a visual, title, and log line for each program could be more effective in engaging potential participants.

#### Testimonials and Impact

The importance of showcasing impact through testimonials or success stories was highlighted. It was recommended to include quotes or images linked to videos for quick consumption while providing an option for viewers to explore more detailed success stories.



## Partnerships and Calls-to-action

The discussion delved into refining calls-to-action, such as joining as a partner or signing up for updates, by providing clear value propositions and streamlining the user journey towards involvement.

## Website Improvement

Boris offered his expertise in developing non-profit websites and emphasized the importance of effective storytelling through visuals and narratives to engage potential donors.

## Donation Platform

Boris discussed different options for setting up a donation platform on the website using tools like Stripe or ACRM (constituent relationship management tool).

## Content Organization

Boris advised Maurita on organizing visual content such as photos and videos effectively to convey a compelling narrative that aligns with the organization's mission.

## Website Structure

Boris suggested organizing the 'About' section with dropdowns for mission, impact, staff details to provide a comprehensive overview.

Actions to take: Implement dropdowns for better organization of information in the 'About' section.

## Compelling Narrative

Discussion on creating a compelling narrative to attract funding as a new nonprofit. Actions to take: Develop a clear and persuasive storytelling approach on the website.

## Collaboration and Scope

Boris advised against scope creep in offering diverse programs like financial literacy alongside filmmaking.

Blocking points: Need for clarity on organizational focus and potential collaboration with specialized organizations.

## Assessment

- The conversation identified key areas for improvement in Maurita's nonprofit website design, with actionable steps outlined for enhancing user engagement through

storytelling elements, refining messaging clarity, and optimizing calls-to-action placement for a more compelling visitor experience.

- The conversation provided valuable insights into enhancing user engagement on the website through improved content structuring and impactful storytelling methods like testimonials and success stories display alongside streamlined calls-to-action tailored towards different involvement options such as volunteering or partnerships.
- Boris offered his services at an hourly rate of \$150 for web development tailored specifically for non-profits, which was well-received by Maurita as it aligned with her budgetary considerations. The discussion also highlighted key areas where improvements could be made on the website to enhance its effectiveness in engaging potential donors through impactful storytelling techniques and streamlined donation processes.
- The conversation provided valuable insights into structuring the nonprofit website effectively by incorporating dropdowns under relevant sections such as mission and staff details within the 'About' page.
- The need to develop a clear storytelling approach was emphasized to attract funding effectively as a new nonprofit organization.
- However, there are blocking points related to defining organizational focus amidst diverse program offerings that need further consideration before implementation.

## Action Items

- Refine video content to enhance user engagement.
- Revise tagline and log line for clarity and specificity.
- Optimize calls-to-action for a more compelling user journey.
- Restructure the 'Get Involved' section with distinct subsections for volunteers, teaching artists, partners.
- Showcase impact numbers on the homepage with a final call-to-action emphasizing ongoing mission support.
- Enhance newsletter sign-up by clearly communicating its value proposition.
- Include nonprofit validation (501c3 status) in contact details.
- Make phone numbers and email addresses clickable for easy access.
- Collaborate with Boris to revamp the website by incorporating effective storytelling elements.
- Set up a user-friendly donation platform using tools like Stripe or ACRM.
- Organize visual content such as photos and videos with compelling captions that align with the organization's mission.
- Implement dropdowns for better organization of information in the 'About' section.
- Develop a clear and persuasive storytelling approach on the website.
- Evaluate potential collaborations with specialized organizations for specific program offerings.

## Blocking Points

- Lack of clear problem-solution narrative in current website content.
  - Overwhelming use of similar colors affecting visual hierarchy.
  - Ineffective placement of calls-to-action hindering user engagement.
  - Lack of clear differentiation between various involvement options (volunteers, partners) within the 'Get Involved' section.
  - Unclear value proposition in newsletter sign-up may hinder user engagement.
  - Ineffective image choice for donation call-to-action might not resonate well with visitors.
  - Lack of experience in creating non-profit websites may hinder Maurita's ability to effectively convey her organization's mission online.
  - Limited resources may pose challenges in implementing comprehensive changes without exceeding budget constraints.
  - Need for clarity on organizational focus amidst diverse program offerings.
  - Potential challenges in weaving together disparate programs under one cohesive narrative.
-

Yisroel Schulman  
Office Hours  
One on One Consultations

<p><b><u>48th Mill Island Block Association</u></b></p>	<p>The association represents private homeowners. It was formed with the intention of both safeguarding the block and providing concrete services.</p> <p>Completed an annual tax filing with IRS (990); NYS Attorney General Registration; and NYS Sales Tax Exemption</p>
<p><b><u>Assn. of Children of WWII</u></b></p>	<p>This is a social club for Russian victims/survivors of WWII residing in Brooklyn.</p> <p>Explained and counseled on Board succession issues including how to conduct membership and Board meetings, election processes and strategic planning. Drafted Board resolutions for banking and membership elections.</p>
<p><b><u>Bayview Houses</u></b></p>	<p>This is a social and advocacy organization representing the interests of the residents of Bayview Houses in Brooklyn.</p> <p>Researched and obtained copies of the corporate governance documents which had been lost to the client and submitted an IRS 1023 EZ application for tax exempt status.</p>
<p><b><u>Brighter Stars of the Future</u></b></p>	<p>This is a corporation established to help the youth in Coney Island through organizing events such as talent shows and distributing backpacks filled with school supplies to area students.</p> <p>Applied for NYS Sales Tax Exemption and filed IRS 990N.</p>
<p><b><u>Espressivo Orchestra</u></b></p>	<p>This is a small community orchestra.</p> <p>Advised and helped them to submit an application to the IRS to change their exemption status from a private foundation to a public charity.</p>

<p><b><u>On My List</u></b></p>	<p>This is an educational youth travel organization for disadvantaged students.</p> <p>Advised on whether to incorporate as a non-profit or a private consulting business.</p>
<p><b><u>Jewish Community Relations Council of New York</u></b></p>	<p>Legal guidance on ending the participation of an individual in a fellowship program.</p>

FALL & WINTER  
2023-2024

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# UPCOMING WORKSHOPS

## 3-Part Series: Developing a High Impact Website for Your Nonprofit

**November 21, 2023**

**12 - 1pm**

### **Part One: Nonprofit Websites 101**

Learn about the purpose of a website; elements every nonprofit website must have in 2023 and beyond; and the pros and cons of different nonprofit website platforms: WordPress versus SquareSpace versus Wix, etc. – The good/fast/cheap tradeoffs.

Register

**December 5, 2023**

**12 - 1 pm**

### **Part Two: Website Storytelling**

Nonprofits do the most important work: changing lives and creating a better world. So why do we struggle for the attention and funding we need? The answer, baked into our very DNA, is storytelling. Learn how to craft a compelling story for your website with user journeys and conversion goals, and with a framework used by Hollywood in its blockbuster films.

There's an art and science to crafting your website's donate page. Learn tricks of the trade to optimize fundraising, and make the most of Google Search and Google Ads.

[Register](#)

---

**December 12, 2023**  
**12 - 1pm**  
**Becoming Funder Ready**

Having a worthy mission and interested supporters is only step #1 towards raising much-needed revenue. In this beginner-level workshop, you will learn the basic necessities of funder-readiness so you can easily respond to opportunities and avoid a reactionary cycle.

[Register](#)

---

**January 9, 2024**  
**12 - 1pm**  
**Planning for Your Organization's Future**

Strategic planning is designed to help organizations plot out their future by addressing major challenges and opportunities in their work. For small organizations that don't have the capacity to hire outside help, this interactive workshop will offer concrete trips and tools to enable you to run a strategic planning process yourself.

Topics that will be covered include:

Research Tools - Interviews, Peer Scans, and Roundtables

Analytical Tool: SWOT

Research Application: Visioning and Goal Setting

[Register](#)

---

**January 16, 2024**  
**12 - 1pm**  
**Coaching Skills: Bolster Performance & Engagement**

This practical workshop allows you to expand your toolset and get the best from others. You'll learn how to use the coaching approach, as well as specific tips, tools and techniques that can be applied directly in the workplace, enabling you to deepen

## 2-Part Series: You're Doing a Great Job: Now Let Everyone Know! Collecting the Right Data to Advance your Organization's Goals

January 23, 2024

12-1pm

### **Part One: Basic Data Every Social Change Organization Should Collect**

What kind of information is important to your nonprofit in order to document the outcomes of its programs? Once those metrics are defined, how do you go about collecting that data? This workshop will help you to understand why data collection and evaluation are essential parts of your organization's work, and how to integrate data collection into your already existing workflows.

Register

February 6, 2024

12-1pm

### **Part Two: Logic Models: A Tool for Framing Data Collection and Analysis**

Logic models provide a picture of your program that show what you're trying to achieve, how you are going about it and what resources you are putting into it. They build common understandings of your work and can serve as the basis for subsequent evaluation.

Register

---

February 13th, 2024

12-1pm

### **The Power of Effective Story-Telling: Koenig Childhood Cancer Foundation**

Raising awareness is key to the success of any nonprofit. But when you're small or just starting out, who has time for storytelling? This workshop tells the story of how the NonProfit HelpDesk worked with Rena Koenig, founder of The Koenig Childhood Cancer Foundation, to craft an authentic and compelling narrative that led to a two-page spread in People magazine. Participants will hear directly from Rena and learn how to pitch a story and identify media opportunities.

Register

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February 20, 2024

12 - 1pm



Register

These workshops are funded by generous allocations from NYC Council Members. NPHD is a project of the Jewish Community Council of Greater Coney Island. [www.JCCGCI.org](http://www.JCCGCI.org)

**About JCCGCI:**

*Jewish Community Council of Greater Coney Island (JCCGCI) is a community-based organization with a citywide scope, providing a wide-spectrum of senior citizen, vocational, educational, crime-reduction, community revitalization and related services benefiting all segments of the population. JCCGCI is also a technical assistance provider, offering capacity building services to nonprofits in all five boroughs through its NonProfit HelpDesk division. With 40 program sites throughout New York City staffed by almost 350 social service professionals, JCCGCI assists an average of upwards of 2,500 needy individuals and families each day.*



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THE NONPROFIT HELP DESK invites you to free online workshops for small and emerging nonprofits that focus on key skills, operating areas, and best practices to help you work smarter.

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**December 12, 2023**  
**12 - 1pm**  
**Becoming Funder Ready**

Having a worthy mission and interested supporters is only step #1 towards raising much-needed revenue. In this beginner-level workshop, you will learn the basic necessities of funder-readiness so you can easily respond to opportunities and avoid a reactionary cycle.

*Presenter: **Amy Fiore** is a consultant who specializes in fundraising planning, strategic planning, board development, and leadership training for nonprofits in the arts, education, and human services sectors.*

[Register](#)

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## REMINDER

Your website's main job is to tell about your nonprofit and its great work. Having an effective website is essential! Learn how to put your best digital foot forward in this 3-part series.

*Presenter: **Boris Kievsky** is a nonprofit digital strategist, Chief Storyteller and Nerd for Good at dotOrgStrategy. With a background that includes 15 years in theater, TV and film, as well as a decade in the tech sector, Boris combines his unique experiences to bring powerful digital expertise to the nonprofit sector.*

**November 21, 2023**  
**12 - 1pm**  
**Part One: Nonprofit Websites 101**

Learn about the purpose of a website; elements every nonprofit website must have in 2023 and beyond; and nonprofit website platform pros and cons: WordPress versus Squarespace versus Wix, etc. – the good/fast/cheap tradeoffs.

Register

---

**December 5, 2023**

**12 - 1pm**

**Part Two: Website Storytelling**

Nonprofits do the most important work: changing lives and creating a better world. So why do we struggle for the attention and funding we need? The answer, baked into our very DNA, is storytelling. Learn how to craft a compelling story for your website with user journeys and conversion goals, and with a framework used by Hollywood in its blockbuster films.

Register

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**December 19, 2023**

**12 - 1pm**

**Part Three: From Getting Attention to Getting Donations**

There's an art and science to crafting your website's donate page. Learn tricks of the trade to optimize fundraising, and make the most of Google Search and Google Ads.

Register

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### **This series also includes:**

**Planning for Your Organization's Future**

Tuesday, January 9th, 12noon - 1pm

[Click Here to Register](#)

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**Coaching Skills: Bolster Performance & Engagement**

Tuesday, January 16th, 12noon - 1pm

[Click Here to Register](#)

---

**2-Part Series:**

**Part One: Basic Data Every Social Change Organization Should Collect**

Tuesday, January 23rd, 12noon - 1pm

[Click Here to Register](#)

**Part Two: Logic Models: A Tool for Framing Data Collection and Analysis**

Tuesday, February 6th, 12noon - 1pm

[Click Here to Register](#)

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## The Power of Effective Story-Telling: Koenig Childhood Cancer Foundation

Tuesday, February 13th, 12noon - 1pm

[Click Here to Register](#)

---

## Poking the Status Quo or, “But We’ve Always Done it this Way”

Tuesday, February 20th, 12noon - 1pm

[Click Here to Register](#)

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For more information on these workshops or to learn more about the NonProfit HelpDesk, go to <https://www.jccgci.org>

The NonProfit HelpDesk offers services, training and dedicated professional support to nonprofits, giving them resources to better serve their communities. All services are free or low-cost.

The workshops are funded by generous allocations from NYC Council Members. NPHD is a project of the Jewish Community Council of Greater Coney Island.



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# NonProfit HelpDesk



NPHD is a project of Jewish Community Council of Greater Coney Island (JCCGCI)

## Special Upcoming 2024 NYC Council Discretionary Funding Virtual Workshops

Space is limited, Sign UP NOW!

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RSVP – <https://bit.ly/NPHD-DF24>

**These interactive virtual workshops are designed to increase understanding about the Discretionary Process and help you prepare your agency's Discretionary Application. Review the newly released Discretionary Application; Attend a Workshop on how to write your proposal; Learn about Capital Grants. Be prepared!**

**Sign Up for Virtual Workshops NOW!**  
Co-sponsored by Council Members:

**Workshopping Your Grant**  
Co-sponsored by Councilmember  
Francisco Moya, District 21  
Thursday, February 1, 2024 6:30-8:00 PM

**The Discretionary Process – Simplified**  
Co-sponsored by Councilmembers  
Susan Zhuang, District 43,  
Monday, February 5, 2024 6:30PM – 8:00 PM

**Capital Grants**  
Co-sponsored by Councilmember  
Farah Louis, District 45  
Thursday, February 8, 2024 6:30-8:00 PM

**Workshopping Your Grant**  
Co-sponsored by Councilmember  
Justin Brannan, District 47  
Monday, February 12, 2024 6:30-8:00 PM

The NonProfit HelpDesk (NPHD) offers Services, training, and dedicated professional staff support to nonprofits, empowering them to serve their clients and communities more efficiently.  
[www.nphd.org](http://www.nphd.org)



New York City Council



## Discretionary Funding Workshops

**Workshopping Your Grant**  
Thursday, February 1, 2024 at 6:30 PM  
*Sponsored by NYC Council Member Francisco Moya*

**Sign Up Now!**

## **The Discretionary Process: Simplified**

Monday, February 5, 2024 at 6:30 PM

*Sponsored by NYC Council Member Susan Zhuang*

[Sign Up Now!](#)

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## **Capital Grants**

Thursday, February 8, 2024 at 6:30 PM

*Sponsored by NYC Council Member Farah Louis*

[Sign Up Now!](#)

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## **Workshopping Your Grant**

Monday, February 12, 2024 at 6:30 PM

*Sponsored by NYC Council Member Justin Brannan*

[Sign Up Now!](#)

**These workshops are sponsored by:**



**Francisco Moya**  
District 21,  
Queens



**Susan Zhuang**  
District 43,  
Brooklyn



**Farah Louis**  
District 45,  
Brooklyn



**Justin Brannan**  
District 47,  
Brooklyn

### **About JCCGCI:**

*Jewish Community Council of Greater Coney Island (JCCGCI) is a community-based organization with a citywide scope, providing a wide-spectrum of senior citizen, vocational, educational, crime-reduction, community revitalization and related services benefiting all segments of the population. JCCGCI is also a technical assistance provider, offering capacity building services to nonprofits in all five boroughs through its NonProfit HelpDesk division ([www.nphd.org](http://www.nphd.org)). With 40 program sites throughout New York City staffed by almost 350 social service professionals, JCCGCI assists an average of upwards of 2,500 needy individuals and families each day.*

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**From:** Scarfogliero, Mary <[MScarfogliero@council.nyc.gov](mailto:MScarfogliero@council.nyc.gov)>

**Sent:** Friday, January 19, 2024 10:16 AM

**To:** Jeri Mendelsohn <[jeri@nphd.org](mailto:jeri@nphd.org)>

**Subject:** Re: Capital Workshop

Jeri,

Thank you so much for hosting the capital workshop.

I have been around *many years* and not much in all my years, has been as cumbersome as the capital allocation process.

You streamlined and summarized the steps/rules like a PRO!!

I learned so much from the workshop.

Thank you again for all you do for our community.

Regards,

Mary

**Mary Scarfogliero**

**District Director**

*Office of Councilwoman Inna Vernikov*

*NYC Council District 48*

*1711 Gravesend Neck Road, Suite 100*

*Brooklyn, New York 11229*

*718-368-9176 ext 100*



**From:** Cheryl Warfield <moreopera@gmail.com>  
**Sent:** Monday, July 1, 2024 12:22 AM  
**To:** Jill Mendelson <j.mendelson@nphd.org>  
**Subject:** Report of Consultancy for MORE Opera

Dear Jill,

I cannot thank you enough for providing MORE Opera and me the spring consultancy in communications and social media through NPHD. Your generosity and understanding of the needs of MORE Opera are enormous, and will not be forgotten. I am certain that the benefits of this consultancy will continue through the next few fiscal years. Certainly, we have seen tremendous growth and credibility since the 2022 consultancy, resulting in two successful grants and new partnerships leading to increased programming revenue.

I have attached a letter from one of our older adult choristers, Sharon Wolfe. I hope this letter will provide some insight as to NPHD's reach into aiding communities outside of Coney Island and Brooklyn, and how much good you have done for others. I cannot thank you enough for believing in MORE Opera and supporting us.

Should you have any questions or need additional information, I will return from singing in Italy July 20. Thank you again.

Kind regards,

Cheryl Warfield

Letter re: the MOCC Chorus under expert direction of Cheryl Warfield, founder of MORE  
Opera/ teaching artist

June 2024

To Whom it May Concern:

As former director of JASA Van Cortlandt Senior Center, I engaged Cheryl Warfield through a Su CASA grant to launch a choral group at our site in spring of 2018. Over the next two years, Cheryl's musical expertise and charisma attracted 25 senior adults of varied ethnicities and music knowledge as regular group participants. She coordinated appealing holiday programs for Thanksgiving, Hanukkah/Christmas, MLK Day, Passover and Holocaust Remembrance. During the pandemic, Cheryl continued to instruct the chorus via zoom and offered meaningful holiday programs online.

In the fall of 2022, Cheryl relocated the original JASA chorus now called MOCC, More Opera Community Chorus, to the Amalgamated Co-op in the Kingsbridge area of the Bronx as part of their education program. She also instructs a weekly singing group at Riverdale Senior Services.

Having retired two years ago, I joined the MOCC chorus this past spring. The group is composed of approximately 20 active members of multiple ethnic backgrounds including African and Caribbean American, Latina, Asian and more. Approximately five of our members are Jewish. We rehearse in person at Vladeck Hall in the co-op and on zoom.

For our Holocaust Remembrance concerts, we performed traditional songs in Hebrew and Yiddish. I was pleased to assist the group with reviewing the Hebrew and Yiddish song lyrics and was touched by my fellow choristers' enthusiasm for learning Jewish folk and liturgical songs.

For Juneteenth, Cheryl coordinated her three choral groups to present an outstanding concert of African American spiritual and operatic songs at the new Bronx Music Hall. The performing groups were: MORE Opera chorus consisting of singers with professional music backgrounds from Manhattan and NJ, the More Opera Community Chorus and Cheryl's recently launched MORE Opera chorus at the Bronx Music Hall. Members of the combined choral groups reside in Riverdale/Kingsbridge, Queens, Manhattan, NJ, So. Bronx and other areas.

Joining the MOCC group has been a lifeline for me. In spring of 2022, I retired due to health issues. Over the past two years, I consulted several doctors, took many medical tests and went for physical therapy. Music listening and singing have always been my favorite pastimes. Under Cheryl Warfield's expert direction and tutelage, I have greatly expanded my performing skills and music knowledge.

Additional benefits from my having joined the MOCC group are: renewed bonds with former JASA senior center volunteers; socializing with residents of other Bronx communities; exposure to music from other cultural traditions and increased self-confidence. Required attendance at weekly rehearsals has given my days and weeks more structure.

Members of the MOCC respect and cherish Cheryl Warfield, our accomplished director. Not only is Cheryl a gifted vocalist, she is also a master teacher who seamlessly integrates music education into every rehearsal.

Cheryl takes a genuine interest in each chorister's wellbeing. We approach her with musical as well as personal concerns and can count on her doing her utmost to accommodate our individual needs. For example, a few of our disabled members cannot stand for long periods of time and are allowed to remain seated during our performances. Due to my Sabbath observance, I am excused from attending MOCC's performance engagements on Saturdays. Cheryl has likewise accommodated members who have scheduled medical treatment that conflicts with rehearsals.

In summary, I wish to thank you and the JCC of Coney Island Not for Profit Help Desk for supporting the MOCC chorus and MORE Opera. I and my fellow choristers have derived much personal benefit from having participated in Cheryl Warfield's MORE Opera music program. On the communal level, MORE Opera has fostered greater cross-cultural understanding and socialization in the Bronx. Ms. Warfield has invested much time and effort in outreach to various communities in the Bronx. With your support, she will continue her outreach efforts to insure the future growth of MORE Opera.

Sincerely yours,

Sharon Wolfe  
Riverdale, NY

July 2024

Program Director

NonProfit HelpDesk (NPHD)

### Job Description

The Program Director provides leadership and overall direction to NPHD, ensuring that organizational development services are made available to nonprofits and emerging grassroots organizations utilizing funds that are largely from the New York City Discretionary Funding process, which is an annual competitive program. This position utilizes a bucket of 200 hours over the course of a fiscal year. At this time, the position is largely remote, with some limited requirements to attend meetings in-person. Specific components of the position include, but are not limited to:

- Determine which areas of organizational development/capacity-building will be addressed during the year and what modalities will be utilized;
- Establish policies for acceptance of client nonprofits for one-on-one support, and for managing projects;
- Identify facilitators with expertise in selected areas for workshops, office hours, and project support;
- Support the hiring process;
- Allocate a bucket of hours to each facilitator for their work during the year and sign-off on their time sheets;
- Work with the facilitators to determine specific topics for workshop presentations and follow-on opportunities, reviewing draft presentations to provide valuable input, and troubleshoot with the facilitators if questions arise;
- Set the program schedule, which typically is a fall/winter calendar and a spring calendar;
- As necessary, provide secondary support for the workshops by introducing NPHD, monitoring the chat, and adding to the presentations;
- Based on the Program Director's areas of expertise, consider presenting workshops as part of the schedule;
- Recruit pro bono facilitators to add to the workshop schedule, and consider opportunities to collaborate with other capacity-building providers;
- Work closely with the Administrative Assistant to promote the workshops (using Constant Contact and Eventbrite) and keep the website updated, which may include new design elements, response forms, and recorded sessions and slide decks.
- Determine additional opportunities to promote the workshops through mention on relevant calendars, e.g., Brooklyn Community Foundation, Support Center; leveraging social media, and by exploring collaborations with Council Members, especially those who are funding NPHD.
- For workshops addressing Discretionary Funds and Capital Funds, ensure we are in a position to support the facilitator by developing a strategy and identifying staff who will outreach to Council Members in the fall regarding their sponsorship of the workshops and support in marketing the presentations. This also includes developing a calendar for

these sessions, which are typically held between end November and early February, and liaising with the Council Members' offices.

- Take advantage of opportunities to raise funds for NPHD through foundations and other sources.
- Evaluate the program, prepare reports, and represent NPHD at high-level meetings.

Candidates for this position will be experienced in providing organizational development assistance to nonprofit organizations, have a deep knowledge of the capacity-building landscape in New York City, and have the ability to manage their time, establish priorities, supervise experienced facilitators, and effectively utilize the bucket of hours assigned to them for this position.

## **Helping to Develop the Capacity of Not-for-Profit Organizations**

*A Collaborative Project of Brooklyn Org, New York Women's Foundation, and  
the Jewish Community Council of Greater Coney Island (JCCGCI)*

Date of Submission: May 1, 2024

Brooklyn Org invited JCCGCI's NonProfit HelpDesk to submit a proposal for two Capital Grants Workshops to be delivered via virtual format over the next few months.

### **Organization**

Jewish Community Council of Greater Coney Island

3001 West 37<sup>th</sup> St., Brooklyn, NY 11224

Executive Director Rabbi Moshe Wiener

[m.wiener@jccgci.org](mailto:m.wiener@jccgci.org)

718-449-5000

Contact Person: Jill Mendelson

Director, NonProfit HelpDesk

[j.mendelson@nphd.org](mailto:j.mendelson@nphd.org)

917-774-8416

### **Background**

The NonProfit HelpDesk (NPHD) is a program of JCCGCI. The department has 30+ years of experience as a provider of capacity-building services designed to address the concerns, priorities, and needs of grassroots and not-for-profit organizations, with a specific focus on small and emerging providers. Currently, NPHD offers its multifaceted courses, prepared and taught by experts in the field, in the fall, winter, and spring, including large group instruction, small group seminars, and individualized support and coaching services. All services are delivered virtually. In addition, specialty workshops on understanding and applying for New York City Discretionary Funding are provided virtually in the fall and winter months, corresponding to the Application Period. In FY23, the NPHD provided 20 capacity building workshops that reached 800 participants. Among the featured topics were strategic planning, governance, fund development, communications, data and program evaluation, financial planning, and leadership. The Discretionary Funding Workshops reached 1,300 participants within 16 sessions.

## **Proposed Services**

Two 90-minute Capital Grants workshops are proposed for Brooklyn Org and the New York Women's Foundation, to take place in late June/July 2024 and September 2024.

## **Instructor**

Jeri Mendelsohn, LCSW, is on staff part-time at the HelpDesk. She has significant experience in nonprofit agency leadership and has written and implemented numerous NYC and NYS Capital and Program Grants. A Licensed Clinical Social Worker, Jeri is a consultant to organizations in not-for-profit, philanthropic, and educational sectors. Her service areas include organizational strategy, assessment and evaluation, grant writing, advocacy, and program development. Jeri is an experienced clinical social worker, educator, and agency executive.

## **Workshops**

### **The Road to Capital Funding**

*Part 1: Exploring Capital Funding: The Good, The Bad, The Possibilities*

*Part 2: Readiness Factors, The Application Process, What Makes for a Successful Application? – for Organizations Meeting Eligibility Criteria*

## **Goal**

To provide nonprofit organizations with engaging, appealing, capacity building experiences designed to demystify critical elements in building a sustainable agency. Using virtual instruction with accompanying slide decks and references, these workshops will help interested nonprofits learn about capital funding from New York City, eligibility requirements, how the funding works, readiness factors, and strategies for success.

## **Responsibilities**

1. NPHD will identify and retain instructors for the courses selected for presentation by Brooklyn Org and will also serve as the liaison between the instructors and Brooklyn Org.
2. The instructors will prepare the course content, slide decks, accompanying hand-outs (if applicable), and will be available to present their course at the time designated by NPHD and Brooklyn Org and the New York Women's Foundation.
3. Brooklyn Org and the New York Women's Foundation will be responsible for the administration and technical operations for the Virtual Format upon which the course will be offered.
4. Brooklyn Org. and the New York Women's Foundation will be responsible for outreach and publicity.

5. NPHD will engage as a collaborative partner and will promote attendance at these workshops through outreach via theJCCGCI's well-established communication systems.
6. The course content including slide deck and recorded presentations will become part of Brooklyn Org's Resource Directory for Nonprofits.

**Budget**

Development and Presentation of Two Workshops: \$1,750

15% Organizational Overhead: \$262.50

**Total - \$2,012.50**