



**Board of Trustees Briefing Packet
February 18–19, 2026**

This Board packet offers background and a conversation guide for the upcoming Citizens & Scholars Board meeting. All materials are in this document, presented in bookmarked sections and organized in the order to be covered on the agenda.

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AGENDA: Board of Trustees Meeting
Wednesday–Thursday, February 18–19, 2026
New York City

Board Dinner: Wednesday, February 18, 2026 | 6:00 PM–9:00 PM ET
[Bucatini NYC | 2 E 45th St, New York, NY 10017 \(between Madison and 5th\)](#)

6:00 PM Cocktails

7:00 PM Dinner

Note: Executive session begins when dessert is served

Business Meeting: Thursday, February 19, 2026 | 8:30 AM–2:00 PM ET
[The Rockefeller Foundation | 420 5th Avenue, New York, NY 10018 \(between 37th and 38th\)](#)

8:30 AM *Continental breakfast available*

9:00 AM Chair’s Welcome/Approval of [Minutes, October 15, 2025](#) [vote]
— Jeffrey Goldstein, Vice Chair

9:10 AM [Operating Updates and Financials](#)—
Rajiv Vinnakota, Beverly Sanford, Christine Winston

9:40 AM [Carnegie Young Leaders: Updates on Program/Fundraising](#)—
Mr. Vinnakota, Audra Watson

10:00 AM Update: [Brand Launch](#) + [&You Campaign](#)
— *Mr. Vinnakota, Jay Geneske, Ms. Watson*

10:45 AM *Break*

11:00 AM [Proposed Partnership With More Perfect](#)—
Mr. Vinnakota, Ms. Watson, Mr. Geneske

11:30 AM [Workplace Portfolio and Credentialing](#)—
Mr. Vinnakota, Bernard Laryea

11:45 AM Open Discussion—Other Items:
[CP2](#), [Narrative Initiative](#), [Dialogue in Practice](#)

12:15 PM *Break to get lunch*

12:30 PM Executive Session with President (*over lunch*)

1:00 PM Full Executive Session

1:30 PM Adjournment

NEXT MEETING:
June 10–11, 2026 | LOCATION: NYC

PRESIDENT'S BOARD PREAMBLE · FEBRUARY 2026

Opening Reflection

When we gathered in October, I shared that the months ahead would be focused on execution and integration—bringing together our programmatic progress, brand identity, and fundraising success into one coherent story. We have made meaningful progress on that front. As we convene again, we do so with real momentum, but also with a clear understanding that the work ahead requires disciplined execution and collective focus.

Our organizational fundamentals—financial, reputational, operational, and cultural—are strong or improving. That gives us confidence, but it also heightens our responsibility to execute well in a moment of expanded visibility and ambition.

Progress and Momentum

- **Carnegie Young Leaders evolution.** The first six months of implementation with 100 teams and 500 Fellows have provided valuable insight. We are refining our pitch, gaining traction with funders, sharpening recruitment strategies, and focusing attention on the 24 states where we currently lack participants. Cohort 2 recruiting begins shortly.
- **Brand relaunch.** After a year of tremendous work, we are poised to relaunch the Citizens & Scholars brand on February 25. This is more than a visual refresh—it is a clearer articulation of who we are and a public commitment to spark 20 million young people to step up as civic problem-solvers by 2029. The opportunity is significant; so is the execution required to activate the brand effectively.
- **College Presidents work deepens.** We are now working alongside 41 schools across three cohorts on campuswide immersion efforts that are beginning to bear fruit. We'll be seeing baseline data from our measurement efforts this year, along with more robust implementation from our partners. We brought together 22 of the 24 Action Council leads from our first two cohorts this January, and the gathering broadened everyone's understanding of what our schools are tackling on the ground. With CP2 fundraising meeting the initial \$15M/three-year goal, we are also exploring additional areas of support aligned with funder enthusiasm and sector demands.
- **College Presidents work expands.** Membership now stands at 135 presidents, even after turnover of 20 presidents over the summer due to retirements and resignations. The quality and breadth of leadership joining the network remain strong.
- **Culture and operations.** Our most recent culture survey shows our Net Promoter Score improving from -18 to 0—a meaningful indicator that internal alignment and morale are strengthening. Feedback identified areas of growing organizational strength (mission alignment, feedback and personal development, faith in coworkers and their quality of work) and continuing areas for improvement (need for more sustainable and predictable workloads, transparency and input into decision-making, and ironically, comfort in expressing beliefs that

may not be aligned with others.) We have a small group of volunteers working with Christine and Indira to create and implement new activities that can further strengthen our culture. We've also welcomed five new staff members since July, four on the College Presidents team and one in Development, which we hope will help to make workloads more sustainable.

Strategic Focus for the Meeting

This meeting is intentionally oriented toward execution. In addition to portfolio updates, we will seek your counsel on several issues...and help with network introductions in other places.

- **Organizational risk assessment.** At our Wednesday evening dinner discussion, we will reflect on how to sustain our *civic renewal* approach in a climate where *political resistance* dominates public discourse. We will also discuss the risk assessment top items and mitigation strategies, where applicable. The summary in the packet will guide that discussion. The conversation will include management and conclude in executive session for discussion of particularly thorny matters.
- **More Perfect partnership.** The potential to work more closely and publicly with More Perfect is promising but requires careful calibration. We look forward to discussing tradeoffs and hearing from Trustees with direct experience and relationships.
- **Workforce partnership direction.** Based on December input and current capacity realities, management will recommend a prudent six-month approach to the workforce portfolio, with defined outputs for discussion at the October meeting.

Above all, this meeting is about ensuring we are aligned not only on direction, but on how each of you can help—through introductions, counsel, and advocacy—as we move into this next, more public phase our work.

Governance and Leadership

We are pleased to welcome Matt Glotzbach and Ted Delicath and look forward to strengthening the collective capacity of the Board. The engagement of Trustees in both strategic guidance and network activation will be critical in this phase.

Looking Ahead

We are becoming more youth-focused in our positioning and sharper in our public voice. That shift requires energy and agility—but also discipline. If the last year was about building the platform, the coming months are about pushing out of the start house and committing to the run ahead (to use an Olympic analogy!). The slope is promising; our execution will determine the outcome.

Thank you, as always, for your partnership, insight, and belief in what we are building together. I look forward to our time in person and to the candid, forward-looking conversation ahead.

Cheers,
Raj

FY '26 OPERATING UPDATES AND FINANCIALS

OBJECTIVE FOR TRUSTEES: Understand how we are progressing against our goals and financial targets.

Progress Against FY '26 Goals

We have made tremendous progress toward our goals in the first half of the year, summarized below. Additional details will follow in the individual sections of the agenda.

Goal #1: Create pipelines and meaningful opportunities for an increasing number of young people (14-24) to engage in their communities, with one another, and with C&S.	
On track	<ul style="list-style-type: none"> Met goal of 550 young people engaged: 500 in CYL, 10 on Youth Advisory Council, 40 attendees at Intergenerational Summit Growing confidence in ability to fund CYL Cohort 2
Goal #2: Make C&S the premier and differentiated nonprofit leader in higher education civic preparation.	
On track	<ul style="list-style-type: none"> CP2 membership on track for 155; 14+ referrals; growing diversity CWI schools meeting milestones; Cohort 3 filled, 42 schools total CP2 fundraising is 66% over plan; upcoming major gifts announcement 11 CP2 media placements; biweekly Raj Forbes column; 30 event presentations
Goal #3: Explore opportunities in workplace, including an expansion of our relationship with the US Chamber of Commerce Foundation, to create direct impact on young people in the workforce at scale.	
Developing	<ul style="list-style-type: none"> Chamber renewed for next phase of pilot (civil discourse) Exploration ongoing to inform workplace strategy
Goal #4: Position C&S as the go-to brand for civic renewal in America—trusted, visible, and influential across sectors and society.	
On track	<ul style="list-style-type: none"> New brand launch Feb 25; announces big goal (20M), funding, partners Activation plans (&You) under way internally and with More Perfect Initial rollout of Higher Ed narrative findings and creative in Mar/Apr
Goal #5: Strengthen the organizational topline, with continued focus on building our runway of unrestricted cash	
On track	<ul style="list-style-type: none"> Revenue forecast 27% above plan, driven by CP2 Unrestricted forecast of 6 months cash by June

Goal #6: Explore new ways to leverage AI, both in our work and as a possible avenue to reach and impact young people at scale.	
Needs Attention	<ul style="list-style-type: none"> • External: Dialogue in Practice pilot on hold pending product fixes • Internal: Held AI builder training for 50% of staff; lots of small uses
Goal #7: Foster a culture of ownership and accountability by improving transparency and equipping teams with better management tools.	
Developing	<ul style="list-style-type: none"> • Net Promoter score from culture survey rose to 0 from -18 • Budget holders getting regular reporting and taking ownership • CRM business requirements set, moving to implementation

How our brand announcement will impact our approach and FY27 goals

Our brand announcement on February 25th will come with a bold, audacious goal to spark 20 million young Americans to engage in everyday civic action over the next 4 years. This “north star” will guide everything from our external posture and framing to our FY27 strategic plans. This year’s programmatic goals (goals 1-4) are already highly aligned to this north star, as are some of our operational goals (e.g. leveraging AI to reach more young people), but you can expect to see some new focus and investment—for instance in partnerships and content for social media—as we plan for next year.

Financial Update

Mid-Year Headlines *(as of 12/31/25)*

- We have **increased our revenue forecast to \$15.3M**, fueled by robust College Presidents funding
- **Expenses are below budget** (~40% of plan YTD), but will catch up as we roll out our new brand and ramp up program delivery and narrative strategy work in second half
- **We did not need to draw on unrestricted cash to fund Carnegie Young Leaders** in first half, but anticipate a draw of up to \$200K this quarter, to be “repaid” once the Carnegie installment arrives in March
- **Unrestricted cash dipped lower** - to 5.7 months of cash vs forecast of 7.0 – primarily due to timing on unrestricted gifts and lower College Presidents earned income
- The **year-end unrestricted cash forecast is \$989K (6.7 months)**, slightly under our previous forecast of \$1.04M (7 months)

Revenue Forecast

Our updated revenue forecast is **\$15.35M, 27% ahead of plan**. This **assumes we will raise the full \$2.15M required to achieve our Carnegie Young Leaders goal**, based on a strong pipeline of prospects at/near the solicitation stage and an increasing level of confidence in those prospects.

Revenue (\$ in 000s)	FY 26 Plan	Current Forecast	FY26 Committed	% Committed vs. Plan	% Committed vs. Forecast
Restricted Gifts	9,606	12,099	9,883	103%	82%
<i>College Presidents</i>	4,050	6,725	6,725	166%	100%
<i>Carnegie Young Leaders</i>	3,195	3,104	954	30%	31%
<i>Fellowships</i>	2,098	2,148	2,148	102%	100%
Unrestricted Gifts	1,500	2,553	1,972	131%	77%
Earned Income (Fee-for-service)	750	550	420	56%	76%
Investment Earnings (realized)	170	150			
Total Revenues	12,026	15,352			

Funding **commitments for College Presidents are at \$6.7M, 66% ahead of plan** and up \$1.5M since our last meeting. While there may be some small additional upside, most funding secured between now and year end will largely impact FY27 funding and beyond.

We recently received a **\$100K grant from Crown Family Philanthropies for Carnegie Young Leaders** and have submitted **two \$1M proposals to the Henry Luce Foundation and the Trust in Practice Awards** (funded by the Aspen Institute and Allstate.) While we work to secure the full funding, we also have a **back-up model ready for a second cohort of 50 teams, which would reduce the fundraising need by \$650K to \$1.5M**.

In December, we also **secured the final 3-year, \$1.2M program renewal for our Mellon suite of fellowships**. All four programs are now fully funded for the next 2.5-3 years.

Unrestricted gifts are on track, though our true unrestricted giving – net of one-time grants from MacArthur Foundation and Lilly Endowment – are lagging slightly behind plan.

Finally, we have **reduced our forecast for earned income by \$200K** due to continued financial pressures in higher ed and the impact on uptake for our June Faculty Institute.

P&L Forecast by Line of Business

We already have the revenue needed to fully fund our Higher Ed, Workplace, and Fellows portfolios, leaving Youth (mostly Carnegie Young Leaders), unrestricted fundraising and higher ed earned income as our focus for the remainder of the year. If we are successful and continue to

manage expenses to budget, **we should have significant end of year cash on hand for all portfolios apart from Workplace.**

Revenue (\$ in 000s)	Admin	Higher Ed	Youth	Workplace	Fellows	Total
Philanthropy	2,553	6,725	3,227	-	2,148	14,653
Earned Income (Fee-for-service)	-	350	-	200	-	550
Investment Earnings (realized)	150	-	-	-	-	150
Total Revenues	2,703	7,075	3,227	200	2,148	15,352
Expenses						
Passthroughs	-	455	892	-	1,128	2,475
Direct Program	-	4,153	1,586	167	878	6,784
Admin	2,510	461	383	33	212	3,598
Total Expenses	2,510	5,069	2,861	200	2,218	12,858
Net Income (Loss)	193	2,006	366	-	(70)	2,495
Starting Cash at 7/1/25	808	254	1,624	-	4,241	6,928
Transfer from Fee-For-Service	350	(350)	-	-	-	-
Ending Cash (6/30/26 Forecast)	1,350	1,910	1,990	-	4,171	9,423

Note: Table does not foot due to rounding.

- **Admin/Unrestricted balances of \$1.35M**, representing \$989K in unrestricted cash and \$361K from the Lilly Endowment capacity-building grant earmarked for FY27
- **Of the \$1.9M on hand for Higher Ed, \$1.3M is funding earmarked for FY27**, and the remaining \$600K will provide continuity until FY27 grant payments arrive
- **Youth balances of \$1.99M will fund Cohort 2 of Carnegie Young Leaders.** All other Youth Portfolio grants (Hewlett & Helios, in support of our Intergenerational Summits and Affective Polarization work) end in this fiscal year.
- The recent **\$200K commitment from the US Chamber of Commerce Foundation will support the next phase of Civics Academy**, but for this fiscal year only.
- With all 4 programs now funded for 3 years, **expect the Fellows portfolio P&L to show a loss for FY27 and FY28** as we spend against funding received in prior years

Cash Flow

Our month-to-month forecast for cash flow now has us operating slightly below our target of 6 months of cash on hand for much of the remainder of the year. This is mainly due to slower receipt of unrestricted gifts and earned income payments. We expect to hit those targets and to exceed 6 months of cash by the end of the year.

Cash Flow (\$ in 000s)	July-Dec	Jan	Feb	Mar	Apr	May	June
	Actual	Fcst	Fcst	Fcst	Fcst	Fcst	Fcst
Starting Cash on Hand	808	844	780	716	732	677	642
Unrestricted Revenues							
Unrestricted Gifts	368	50	50	50	50	50	370
Lilly/MacArthur Unrestricted	472	-	-	-	-	-	-
Fee-for-Service	164	20	20	150	30	50	116
Investment Earnings	76	13	13	13	12	12	12
Total Unrestricted Rev.	1,080	83	83	213	92	112	498
Unrestricted Expenses							
Unabsorbed Admin	1,026	125	125	125	125	125	127
Exp. against Earned Income	19	22	22	72	22	22	24
Uncovered Program	-	-	-	-	-	-	-
Total Expenses	1,045	147	147	197	147	147	151
Cash Balance	844	780	716	732	677	642	989
Months Unrestricted Cash	5.7	5.3	4.8	4.9	4.5	4.3	6.7
Potential CYL Draw		(100)	(100)	200			(183)
Mos. of Cash with CYL Draw		4.6	3.5				5.4

The red box above shows the **potential impact of a draw on unrestricted cash from Carnegie Young Leaders**, including a March repayment of any draw this quarter. **If we were to fail to raise any other funds for the program and had to forego a second cohort, the maximum draw on our cash reserves at year end would be ~\$183K.**

PROGRAM UPDATES

OBJECTIVE FOR TRUSTEES: Understand how we are progressing against our programmatic goals.

Carnegie Young Leaders (CYL) Fellowships

As a reminder: By June 2026, CYL aims to have recruited 1,000 Fellows—two cohorts of 500—across 200 teams representing all 50 states and Washington, D.C.

In Year 1, we **successfully recruited 100 teams** of 14- to 24-year-olds from 26 states and Washington, DC. That first cohort of CYL Fellows, now in the middle of their project year, has submitted mid-year reports. Their reports, along with coaches' feedback, reveal that **most teams are making progress** toward their goals but have had to shift one or more strategies, often because of difficulty in maintaining consistent communication with key community stakeholders.

We are now marketing and recruiting for Cohort 2, with applications to open later this month and close in early May. We are focused on **ensuring participation from the remaining 24 states** where we had no representation last year and on increasing the number of rural teams in the cohort. The second cohort will enable us to meet the overall goal of engaging directly with 1000 young people, and indirectly connecting with and inspiring thousands more.

Trustees' advice and feedback on CYL during the October Board meeting and informal November call has helped us to **strengthen the program narrative and design**. CYL is now more clearly positioned: It is both (1) a rigorous leadership Fellowship that develops young people's civic identity, collaborative problem-solving skills, and capacity for dialogue across difference, and (2) an emerging platform for broader participation that will help inspire young people beyond the program to take meaningful civic action.

We do have **metrics to assess Fellows' development**. Baseline survey data tell us that these Fellows are actively involved in their communities, feel a strong sense of responsibility to them, and believe they have good communications—but are less likely to engage in constructive dialogue with people in their communities than with their peers. The post-survey, in June 2026, will tell us more about their growth.

CYL Fundraising

The C&S Development team has continued its work to secure funding commitments for the program. An additional \$2.15M in new commitments is required by fiscal year-end to fully fund the program and allow us to bring on a second cohort of 100 teams.

We have cast a wide net in preparing and submitting applications, as well as cultivating new relationships. We have applied for two \$1M grants since the beginning of the calendar year—one through an open call for the **Aspen Institute's** "Trust in Practice" awards (where we are likely one of several hundred applicants), the other as a \$1M proposal for the **Henry Luce Foundation**, to be considered at their March board meeting.

In Q4 of FY26, we plan to submit two separate requests to the William and Flora **Hewlett Foundation**, each conservatively estimated at \$500K—the first specifically targeted toward CYL, with the second for general operations. Hewlett is working on its overall grantmaking strategy with new leadership in place but is eager to do something for America’s 250th as well as for its own 60th anniversary.

Our current prospect pool of 51 funders includes the Bezos Family Foundation, Ballmer Group, and several regional foundations, which, like Grable, are capable of making smaller-level commitments to sponsor a team of young leaders. A single team can be fully funded with a \$25,000 gift.

Fellowships

The Mellon suite of fellowships at C&S continue, as they have over the past quarter-century, to prepare a **new generation of young scholars and faculty** for careers in the academy. Thousands of Fellows from these four programs have taught generations of college students, expanding their opportunities to engage in productive discussions across difference, to assess and use credible information sources, and to collaborate on creating solutions with those who have widely differing perspectives. Since last fall, a **round of program renewals** with the Mellon Foundation has been completed, positioning these programs—from a pipeline into graduate school to dissertation support to early faculty development and leadership—to continue their work for another three years.

College Presidents for Civic Preparedness (CP2)

CP2 Membership and Engagement

After a challenging degree of turnover over the summer, we are **back on pace to reach our goal of 155 members by June 30**, with 135 current member presidents. So far, we have **added 29 new presidents, but lost 7 more to turnover, for net growth of 20%**. New members include big systems (the SUNY and CUNY system chancellors), Ivies (Cornell has returned), publics in red states (University of Iowa, Weber State in UT, University of North Texas), and leading faith-based institutions (Texas Christian University.) 30% of members are now from public institutions (up from 27% last year) and 17% are from minority-serving institutions (up from 13% last year.) Publics and community colleges remain a key focus for us this year.

Our efforts to create deeper member engagement through programming are also paying off, with **87% of current members participating in events and programs during 2025**. On average, members have engaged in coalition activities on 3-4 separate occasions.

CP2 Leadership Council

Sixteen of the 24 current Leadership Council members attended the **annual convening of the CP2 Leadership Council** in Washington, D.C. on Friday and Saturday, January 23–24. The group included three of four new Leadership Council members: John King (SUNY), Brooke Barnett (Rollins College), and Chris Reber (Hudson County Community College). (Harrison Keller from the University of North Texas was unable to travel.) Also present were two former presidents (Grant

Cornwell [Rollins] and Jonathan Holloway [Rutgers]), as well as C&S Trustee colleagues Stefanie Sanford and Mark Walsh.

In light of that weekend's snowstorm, the convening was truncated to cover as much of the agenda as possible in less time. The Leadership Council heard updates on C&S' narrative strategy work for higher education, gave feedback on data expectations, and dug into implementation questions about faculty buy-in and curricular revision. They also offered **powerful perspectives on how CP2 should position itself versus other efforts in the field**. In addition, two members of the C&S Youth Advisory Council presented a proposed student-led component of CP2; two Leadership Council campuses may pilot the students' idea. Finally, Council members weighed in on CP2 priorities for the year ahead, including the possibility of **convening all 130+ CP2 presidents** in person in fall 2026 or early 2027.

To ensure full engagement, we have been conducting follow-up calls with Leadership Council members whose convening travel was cancelled and will reconvene the full group virtually in March. Chancellor John King has also agreed to speak at a confidential CP2 presidents forum in April, postponing a session intended for the January gathering.

CP2 Campuswide Immersion (CWI)

Having successfully recruited its intended **third cohort of 15 new institutions**, the CP2 Campuswide Immersion team has now onboarded these schools, which are working on their action plans. The team also continues to monitor the progress of Cohorts 1 and 2. Altogether, **41 institutions have joined CWI**; two of these are on hiatus during presidential transitions and will move through their two-year planning and implementation process at a different pace than anticipated. The CWI team is shepherding all of these institutions through the implementation of **campuswide surveys** that will help both the schools and C&S establish baseline data for the effectiveness of their culture change efforts.

On January 20-21, 22 of the 24 campus **Action Council leads from the first two CWI cohorts convened** in Washington, D.C. to share their perspectives and insights with each other. The CWI team worked with all on questions of assessment, student engagement, and challenges to their respective efforts. In addition, participants reviewed the first two in a planned series of case studies to illuminate and build on CWI's work. Our Einhorn Collaborative program officer was in the room to learn more about how these efforts are taking shape. He found the sessions useful and evocative, and left us with a challenge to **tell more and smaller stories** about some of the practical implications of CWI efforts (such as reduced roommate conflict, an example offered by one campus).

Funding successes to date have enabled us to **expand the CWI team** with two additional members, both bringing administrative capacity and one adding content expertise in credible information. This more robust team will be needed both to ensure fidelity of implementation with the current 41 institutions and to prepare for scaling up with **additional cohorts beginning this fall**.

The CWI measurement work has also become the basis for a conversation with several other organizations working in higher ed in the area of pluralism, bridge-building, and civic learning; these include the Constructive Dialogue Institute, CLDE, Campus Compact, and Interfaith America. These conversations are responsive to urging from both funders and presidents that we **coordinate assessment efforts**. They also create a platform for learning in a field that lacks good shared metrics. C&S is roughly 18 months to two years ahead of most of these efforts and therefore has an **opportunity to shape the discussion**.

CP2 Faculty Institute

To date we have filled nearly half of the seats for this summer’s multicampus, in-person Faculty Institute. Meanwhile, work continues on a set of five **pilots for campus-specific Faculty Institutes**:

- a hybrid (virtual + in-person) series for the University of Illinois (*September 2025-March 2026*)
- a four-campus, 36-hour model for the SUNY system (*February 2026*)
- a daylong in-person session for Hudson County Community College (*February 2026*)
- a daylong in-person session for Manhattanville University (*May 2026*)
- a 36-hour version for Benedict College (*probably August 2026*)

In addition, three more institutions—a state community college system, another major Midwestern public research university, and a private university—are asking for sessions in the 2026-27 academic year. It has been instructive for us to test such a **range of models at a diverse set of institutions**. Looking ahead to next year, we are **sharpening the definition** of what we can and will offer campuses interested in these local versions, so that customization addresses campus needs well and fully but does not outstrip our effectiveness or bandwidth.

Dialogue in Practice (VSM)

The pilot of the beta product this fall had a few bright spots and some very real pain points. **User feedback surfaced some significant issues with product functionality, leading us to pause the beta** in December and ask Noodle to make updates, all of which were fixes inside the scope of the original product spec. Noodle provided us with an updated version in early February, which fixed some problems but created significant other navigation and curricular issues. As of this writing, we are escalating the issue to John Katzman and should be able to provide a further update to the Board when we are in person.

So far, **we have learned the following**:

- **There is significant excitement and demand for this product.** We reached out to our 42 CWI schools to offer the pilot and 28 expressed interest, with 7 (so far) committing to pilot with groups of students.
- **Students and faculty are deeply skeptical of AI and talking with bots.** We are addressing this in welcome messaging, framing it as a tool that provides practice for real life conversations. The training does win them over: one administrator told us that their faculty testers were “impressed in spite of themselves.”

- **The timeline between expressed interest and commitment is longer than expected.** In most instances, large groups of administrators and faculty want to test the module before putting it in front of students.
- **In hindsight, we should have waited for Noodle to stitch the pre- and post-surveys into the module before rollout.** The multi-step process (students were given access to the survey first, then access to the module on completion) led to slow progress and caused drop off. It was also labor intensive for us to administer.

Between October and early December, we provided access to ~100 students, faculty, and staff, and received feedback mainly from focus groups and some exit surveys. Their feedback around core functionality issues (bots cutting off conversation abruptly, tutor bot not having access to the conversation for feedback, etc.) was what led to the original pause of the beta, alongside our desire for Noodle to incorporate the pre- and post-surveys into the module. **We are now significantly behind plan, which had us reaching 12,000 students by the end of March. If Noodle can deliver a functional product this quarter (a major dependency), we should still be able to reach ~ 5,000 students before fiscal year end and position ourselves to get back on track to deliver to 10-15,000 students during fall orientation.**

Civics Academy

We have **contracted with the US Chamber of Commerce Foundation for \$200K in earned income** that will fund two key upgrades to the Civic Academy product. First, we will be **adding a training module on civil discourse**, leveraging our existing curriculum. (As a reminder, the first pilot of Civics Academy focused on civic *knowledge*, so this addition will bring it more in line with our other offerings around civic *skills*.) Second, we will be **porting the product to a different Learning Management System to enable further customizations and control for each participating company**. We will be delivering the beta product for testing by the end of March. The Chamber is assembling 4 cohorts of up to 100 users each for the testing period in April and May. If all goes well, the platform will launch nationally in June with a target of reaching 50 employers in year 1.

BRAND RELAUNCH + FEBRUARY 25 ANNOUNCEMENT

OBJECTIVE FOR TRUSTEES: Understand plans for the upcoming C&S brand relaunch; consider and offer connections to expand C&S networks and reach.

On February 25, we will publicly relaunch C&S under our new brand strategy, anchored in our core idea: *The Power of &*.

This strategy sharpens our focus on young people as protagonists—especially Gen Z who care about their communities and want a way to contribute, but don’t always know where to start. It clarifies our positioning: C&S is a civic engagement catalyst that sparks young Americans to create bold, fresh solutions to civic problems. Across higher education, communities, and the workplace, our work ladders up to one outcome: preparing productive citizens who can work across differences, use reliable information, and solve problems together. **At the Board meeting, we will share visuals that will help bring this new brand to life.**

The February 25 relaunch will include a bold public commitment:

By 2029, C&S will spark 20 million young people to step up as civic problem-solvers.

This goal reflects both the scale of our current programs and the ambition of what comes next.

A central part of that next chapter is *&You*, our national activation platform to be developed with partners—which we’ll discuss at the Board meeting. *&You* is designed to reach well beyond traditional C&S program participants—inviting millions of young people into accessible, everyday civic actions rooted in the three foundational civic skills. February 25 will signal this campaign and open early participation, while the full public launch will build toward summer 2026.

Between February and summer, our focus will be on:

- Growing audience lists and anticipation through pull-first digital engagement
- Securing brand-level partnerships to extend reach and credibility
- Building creative infrastructure and testing activation formats
- Aligning programs, storytelling, and measurement to support the larger brand strategy, rather than a focus on siloed approach

On February 25, the Board can expect:

- A refreshed website and brand identity
- Public announcement of our multi-year commitment
- Early framing of the *&You* campaign and partner ecosystem
- Coordinated communications across funders, presidents, Gen Z leaders, and media

This moment is not simply a rebrand—it is a signal of a new era for C&S. We’ll send a clarion call of the scale, ambition, and clarity about the role C&S intends to play in this next chapter for the country.

The &YOU Campaign: Achieving National Reach

OBJECTIVE FOR TRUSTEES: Understand plans for the upcoming C&S brand relaunch; consider and offer connections to expand C&S networks and reach.

Why &You

Core to C&S's mission and the new brand strategy is the imperative to reach and engage a critical mass of young people beyond the high-touch participation of C&S's current programs. *&You* is proposed as a national participation platform designed to spark 20 million young people to take an everyday civic action that helps their community.

The desired impact is defined as:

- Millions of young people practicing civic skills
- Increased confidence, capability, and identity as “everyday civic problem-solvers”
- A visible shift from passive concern to active participation (see Gen Z Civic Vibe Check in suggested reading below)

What &You Is

C&S, likely alongside key strategic partners, would build *&You*, but it is important to note that *&You* is not a single website or product.

Instead, *&You* functions as a participation backbone—enabling millions of people, organizations, campuses, and partners to act locally while contributing to a shared national effort.

&You follows a proven large-scale participation model used by platforms such as GivingTuesday, Earth Hour, DoSomething, and Movember (see Further Reading). These platforms succeed because they:

- Invite participation at massive scale
- Track participation credibly without over-engineering
- Balance rigor with accessibility and momentum
- Attract participation from organizations and partners without taking credit for their work
- Sustain shared infrastructure required to operate credibly at national or global scale

How &You Participation Might Work

C&S would contract a lead campaign agency to build and run *&You*, under the direction of key C&S staff (Audra Watson, Jay Geneske). C&S is continuing its partnership with the firm YellowLion to build the audience strategy and creative execution for C&S's new brand, while also designing the early building blocks for *&You*.

While specific mechanics would be finalized with the campaign agency, the core idea is simple: &You invites young people to take one clear, concrete civic action. For example:

- *Host a community listening session*
- *Volunteer at a local food kitchen*
- *Conduct a community survey*
- *Write letters to local representatives*
- *Host local get-out-the-vote campaigns*
- *Start a book drive campaign for underserved schools with limited resources*

Participation is designed to be:

- Low-barrier—anyone can do it
- Locally defined—actions fit context
- Cumulatively meaningful—small actions add up at scale

How &You Participation Might Be Counted

Large-scale participation platforms define success as behavior change at population scale, not perfect verification of individual actions.

At 20-million-person scale, no credible platform tracks every action individually. Instead, &You follows a blended measurement approach used by established participation movements.

1. Direct Participation Signals

What can be counted directly, such as:

- Sign-ups or opt-ins
- Digital action confirmations
- Partner-reported participation totals (e.g., campuses, employers, community groups)

2. Self-Reported Action

More engaged participants may confirm completion of a clearly defined, time-bound action—reducing ambiguity while preserving scale. A participant might, for instance, fill in information on an app about a community conversation or listening session that they facilitated.

3. Surveys & Modeled Estimates

Only where needed, participation beyond direct channels can be captured through:

- Periodic national surveys
- Partner data aggregation
- Modeled estimates accounting for offline and decentralized activity

4. Visibility & Momentum Signals

Used as corroborating evidence and momentum builder:

- Stories and testimonials
- Media and social participation
- Geographic and demographic spread

No single metric stands alone. Credibility comes from triangulation.

How *&You* Reaches Scale

Amplification for *&You* is designed to operate at population scale, with the explicit objective of creating affinity and building demand for everyday civic participation. This is not a strategy to recruit a narrow set of high-intent handraisers.

This layer of the work is about reach, normalization, and cultural presence, ensuring that *&You* shows up where young people already are, in formats they already trust. We're focused on a large population of low-intent prospects—young people who we know care about their communities, but are not actively seeking deep civic engagement opportunities.

The amplification strategy is intentionally broad reach (top-of-funnel) and awareness-focused.

Key characteristics:

- Mass reach, not niche targeting
- Designed for first exposure, not conversion optimization
- Built to meet young people in native formats and channels

Tactically, amplification will rely on a mix of:

- Paid — to ensure scale and consistency
- Earned — to build credibility and cultural relevance
- Shared — to allow participation and identity signaling

The role of the C&S brand in amplification is intentionally minimal.

- C&S acts as an endorser, not the protagonist
- The campaign leads with *&You*, not institutional branding
- This posture mirrors successful participation platforms, where institutional restraint increases adoption and trust

This approach:

- Lowers barriers for partners to amplify
- Avoids competition for credit
- Keeps focus on participation, not the organization

While a lead campaign agency will ultimately set direction on specific channels and tactics, research and precedent indicate that each of the following categories must be represented for *&You* to reach 20+ million effectively.

1. Content & Streaming

Long-form and short-form content designed for entertainment-first discovery, not civic instruction, such as podcasts, scripted or semi-scripted series, and short-form video and social-native formats. Stylistic reference points (not prescriptions) include [Jubilee Media](#)-style social experiments, opinion-driven formats like [Hot Takes](#), and personality-led commentary formats similar to [The Broski Report](#).

2. News / App-Based Partnerships

Brand partnerships with news or information apps that already reach young audiences in daily habits, such as a partnership with a news app (e.g., [InPress](#)-style formats). Delivered in a native, non-preachy format to normalize civic skill-building inside everyday information consumption.

3. Game Design & Interactive Partnerships

Entertainment-forward formats that embed civic skills into play, such as a game show where two people must find common ground on one thing in order to win money. Cultural references: *Double Dare*, *Family Feud*, *\$100,000 Pyramid*.

4. Events & Awards

Visible, culturally coded moments (e.g. [Las Culturistas](#)) that celebrate participation and create shareable experiences. Should be a mix of online and pop-up IRL events, like *&You* Awards hosted on campuses, in communities, and in workplaces.

5. Creator & Partner-Led Amplification (Implied Backbone)

While not a single format, creator and partner participation cuts across all categories. Creators act as trusted translators, and partners adapt *&You* into their own channels and contexts. Amplification succeeds because it is distributed, not centralized.

Further Reading & Precedent

&You's participation and measurement approach is informed by established large-scale platforms—including GivingTuesday, DoSomething, Earth Hour, Movember, and Vote Ready—as well as field guidance on backbone infrastructure and impact measurement.

Platform Overviews

- **GivingTuesday** — A global generosity movement enabling decentralized participation while partners retain ownership of impact
- **DoSomething** — A youth action platform mobilizing millions through mobile-first, self-reported participation
- **Earth Hour** — A symbolic global campaign prioritizing collective visibility and meaning
- **Movember** — An identity-driven participation movement built on simple, visible action
- **Vote Ready** — Civic infrastructure enabling institutions to amplify individual action

External Articles, Case Studies, and Analysis

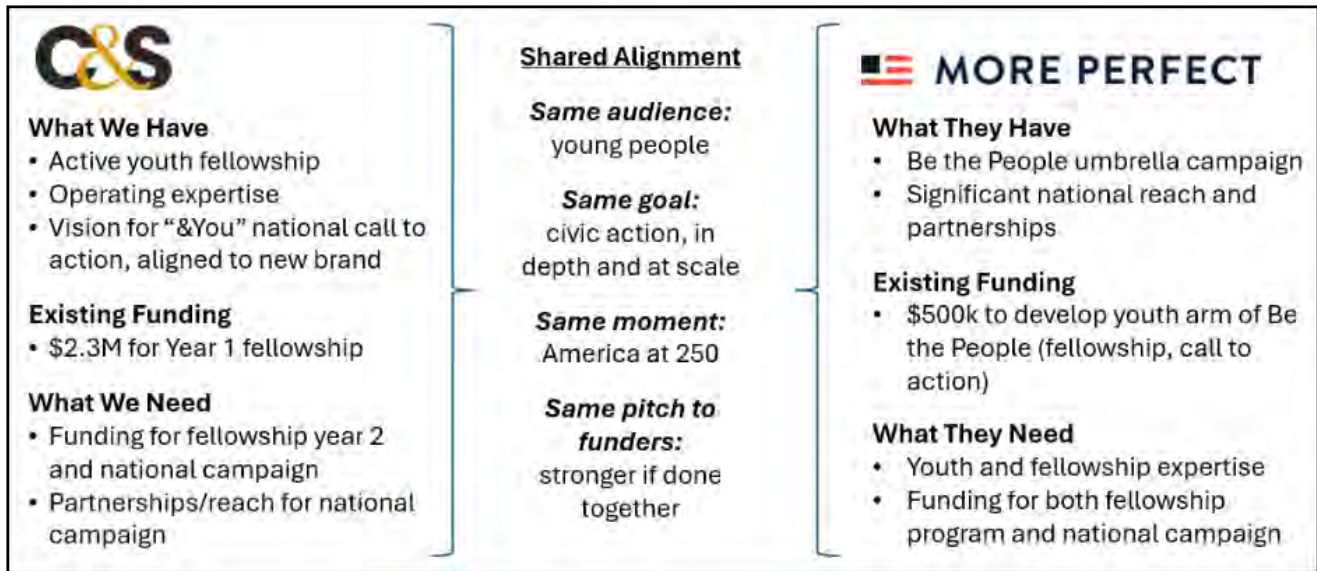
- C&S's Civic Vibe Check
<https://citizensandscholars.org/research/gen-z-civic-vibe-check/>
- Stanford Social Innovation Review
https://ssir.org/articles/entry/understanding_the_value_of_backbone_organizations_in_collective_impact_1
- Bridgespan Group
<https://www.bridgespan.org/insights/nonprofit-organizational-effectiveness/what-is-impact-measurement-and-how-can-organizations-use-it>
- GivingTuesday Data Commons
<https://data.givingtuesday.org/givingtuesday-impact-measurement/>
- WWF *Earth Hour*
<https://www.earthhour.org/reports>
- Bloomerang
<https://bloomerang.co/blog/givingtuesday/>
- Stanford Social Innovation Review
https://ssir.org/articles/entry/the_givingtuesday_model
- Harvard Business Review
<https://hbr.org/2014/12/understanding-new-power>
- Meltwater
<https://www.meltwater.com/en/blog/wwf-earth-hour-campaign>

PROPOSED PARTNERSHIP: C&S + MORE PERFECT

OBJECTIVE FOR TRUSTEES: Understand a proposed partnership that may both advance the work of the Carnegie Young Leaders program and further C&S’ branding strategy; in particular, consider the pros/cons of the partnership and advise on mitigation strategies/approaches to decrease the cons/risks.

Over the past several months, **we have been exploring a partnership with [More Perfect](#)**, which has been seeking to incorporate a youth component in its plans for the nation’s 250th anniversary. This emerging partnership would **help us reach both depth and scale**. The plan (a) builds on the [Carnegie Young Leaders \(CYL\)](#) program as a rigorous youth fellowship that strengthens leadership capacity and supports community improvement projects, and (b) supplements it with a broader national call to action that invites many more young people to participate in civic life during and after the nation’s 250th anniversary—which could be a platform for C&S’s *&You* campaign.

Our rationale for the partnership is **that it aligns assets, efforts and timing in a way that could prove catalytic**. C&S brings an established youth fellowship (CYL), operating expertise, existing fellowship funding (including \$2.2M for Year 1), and a clear youth audience strategy ([&You, p. 16](#)). More Perfect brings a national campaign, “Be the People,” significant reach, and some early funding to develop a youth arm. This latter work would build on CYL, expand its visibility, and dovetail with the *&You* campaign.



Operationalizing and Funding This Partnership

The *&You* campaign is outside of the scope of our FY26 plan and budget, and C&S continues to seek funding to recruit and support our next cohort of CYL Fellows. The proposed partnership with More Perfect, starting this spring and continuing through FY27, has the potential to help provide resources for both, as well as to amplify shared programmatic efforts and visibility.

Our expectations of the partnership would include (1) access to new fundraising prospects, (2) reach through More Perfect’s partnership channels, and (3) the potential opportunity to leverage the platform infrastructure being built by the “Be the People” campaign (led by

Stand Together, with More Perfect as one of its founding members) and to become their youth-facing arm.

As C&S and More Perfect build momentum toward the 250th, we have begun fundraising, identifying key stakeholders, and assessing content development priorities. On the resource side, the **partnership needs a total investment of \$5M**. This includes the **\$2M that C&S needs for cohort 2 of Carnegie Young Leaders and \$3M for the national call to civic action**, comprising both &You and extended efforts at More Perfect. The majority of that \$3M (roughly \$2M) would be spent on the campaign strategy and creative, content and platform development, marketing and media buys, and events and local activation activities. The remainder would cover salaries for the existing staff involved (ours and theirs), as well as new staff and consultants to handle project management, campaign management, measurement and evaluation, and more.

To date, the emerging More Perfect partnership has allowed us to collaborate with their team on funder approaches that would support the Carnegie Young Leaders Fellowship, including the Kellogg Foundation, the Skoll Foundation, and Allstate. The pitch to funders for this joint work is strengthened by its combination of depth and scale, as well as its timeliness in the lead-up to the nation’s 250th anniversary. With CYL marketing and recruitment already under way, **we would aim to announce a partnership in March**, giving a boost to program recruitment well ahead of the May application deadline. This timeline would also closely follow the C&S brand launch in late February and provide a robust opportunity to begin the &You work.

Timing and Funding Alignment

	Now – 6/30/26	7/1/26 – 6/30/27 (America’s 250 th)	7/1/27 Forward
C&S Brand & Audience Building	Feb 25 th brand launch PR: BHAG announcement Audience building Storytelling, content dev’t	Ongoing storytelling Program expansions Programmatic partnerships Activation partnerships	Ongoing youth engagement through programs and partnerships to reach BHAG
	<i>Funded by C&S FY 26 Plan</i>	<i>To be funded by C&S</i>	<i>To be funded by C&S</i>
Carnegie Young Leaders Fellowship	Cohort 1 programming Cohort 2 recruitment	Cohort 2 programming	Annual cohorts, if funded
	<i>Funded by C&S FY 26 Plan</i>	<i>To be funded by joint \$5M raise</i>	<i>To be funded by C&S</i>
National Call to Action	Project planning Message, content dev’t Fundraising	Campaign execution Events and local activation Includes/amplifies “&You”	Continued “&You” activations to reach BHAG
	<i>To be funded by joint \$5M raise</i>	<i>To be funded by joint \$5M raise</i>	<i>To be funded by C&S</i>

C&S-Owned Partnership with More Perfect

C&S HIGHER EDUCATION NARRATIVE INITIATIVE

OBJECTIVE FOR TRUSTEES: Understand the context, status, and next steps for a major C&S initiative to change or create a new narrative about higher education.

I. Why This Work, Why Now

The Higher Education Narrative Initiative was launched in fall 2025 with funding from the MacArthur Foundation in response to a *perception* of a growing concern:

- That public trust in higher education may be declining—for a variety of reasons
- That cost, ROI, relevance, and integrity dominate the debate
- In an era of increased political, cultural, and economic scrutiny, defensive arguments about higher ed’s value would not be effective in strengthening trust

The initiative exists to first understand the realities of the current public narrative—how higher education is *actually* perceived, where trust is strong or fragile, and what drives those perceptions—and then to create or change the story about higher education’s role in developing citizens.

The initiative is grounded in a core belief:

*When colleges clearly demonstrate their civic contributions,
public trust—and perceived value—will grow.*

This work matters to C&S because we believe the country depends on colleges and universities to civically prepare students to be productive citizens, to help communities solve problems, and to sustain a healthy civic culture in a divided society.

This initiative is rooted in the science of narrative strategy. A new or shifted narrative about higher ed will not be built through messaging alone. Narrative change happens when people can clearly see, feel, and understand how higher education contributes to their lives and communities.

C&S’s role is not to defend higher education as an institution. It is to help shift the national story about its value—from abstraction and aspiration to visibility and proof. That means elevating what colleges do at their best, clarifying what the public reasonably expects, and motivating trust-building action across and between higher education leaders, employers, media, philanthropy, and culture.

II. How This Initiative Works

The initiative is structured in short, adaptive sprints:

- Organized in 1–3-month cycles

- Designed to test hypotheses, learn quickly, and adapt
- Grounded in research, lived experience, and real-world conditions

Sprint 1 (completed early February) focused on diagnosis.

Sprint 2 (under way) will create the story.

Sprints 3+ (beginning March) begins changing narrative conditions at scale.

III. Sprint 1: What We Learned

Sprint 1 was intentionally diagnostic. It examined:

- How the public defines “trust” in higher education
- Where trust is strong, fragile, or breaking down
- The gap between belief in higher education’s promise and confidence in its performance
- Narrative opportunities to meaningfully rebuild trust

Inputs included:

- Dozens of conversations with diverse stakeholders, especially beyond higher ed
- A national media scan
- A representative survey of U.S. adults focused on trust, ROI, value, and civic contribution

What the Data Clarified

1. Trust Exists—but It Is Conditional and Fragile

The assumption that trust had collapsed is not fully supported by the data.

- 71% of Americans report trusting higher education.
- Trust spans political, racial, and educational lines.
- “My local college” is trusted more than higher education in the abstract.

However, trust is conditional:

- It increases when institutions appear focused on education and mission.
- It declines when motives appear political, ideological, or self-serving.

A large “movable” middle exists in *either* direction of trust—open, but unconvinced.

2. Civic Value Is Widely Believed—but Poorly Defined

Most Americans believe colleges:

- Teach critical thinking
- Help people engage across differences

However:

- Few can articulate specific civic skills, experiences, or outcomes.
- Cost and ROI remain the dominant lens through which value is judged.

In short:

Belief exists. Proof does not.

The civic mission is respected in theory—but underpowered as a visible narrative.

3. Local Impact Is the Missing Proof Point

Americans want colleges to:

- Strengthen their communities
- Build job pipelines
- Help solve real-world problems

Yet many are unsure whether colleges actually deliver visible local benefits.

Media coverage reinforces this gap:

- National debates dominate headlines.
- Senior institutional voices dominate coverage.
- Lived experience and community-level outcomes are largely invisible.

Trust becomes durable when impact is visible locally.

4. Audience Landscape

Sprint 1 identified six audience mindsets:

- 26% All-in Allies
- 14% Constructive Critics
- 14% Reform-Minded Individualists
- 17% ROI Skeptics
- 13% Disconnected & Disillusioned
- 17% Hardline Opponents

The strategic opportunity lies mostly with the “moveable” middle (Constructive Critics, Reform-Minded Individualists, ROI Skeptics, and Disconnection & Disillusioned).

- They hold an expansive shared vision of what higher education should be.
- They question who truly benefits.
- They want to believe.
- They lack visible proof.

Trust in higher education exists—but it is conditional. It is filtered through cost and ROI, shaped by perceived integrity, and sustained only when civic contribution is visible and local.

IV. Strategic Implication

Sprint 1 reframes the problem.

The challenge is not convincing people that higher education matters.
The challenge is making its value visible, concrete, and credible.

This requires a posture shift:

- From defense → to offense
- From abstract value claims → to visible proof
- From national debate → to community-level impact
- From institutional voice → to lived experience

We are now completing a public-facing distribution plan of the findings to gain early credibility, momentum, and idea generation with key audiences.

At the same time, we’ve begun Sprint 2, which is about creating the story—by increasing the visibility of higher education’s civic contributions and building the infrastructure that allows the broader field to amplify and scale this narrative shift.

C&S will play two complementary roles moving forward:

1. Owner of High-Leverage Infrastructure

C&S will directly own select efforts that establish quality, credibility, and direction for the field:

- Research and narrative framing
- Creative standards and story infrastructure
- Agenda-setting convenings
- Ongoing evaluation and pulse tracking

2. Platform and Catalyst

The majority of impact will come from enabling others:

- College presidents (including the College Presidents for Civic Preparedness coalition) and campus leaders
- Civic and community organizations
- Business and workforce leaders
- Media and cultural intermediaries

C&S builds the engine. The field generates the momentum.

As more actors adopt and adapt the narrative frame:

1. C&S-owned work sets the bar
2. Platform partners amplify and localize
3. Local proof becomes visible
4. Trust signals increase
5. Demand grows for participation and evidence

The flywheel reinforces itself.

Closing

Sprint 1 validated that higher education's legitimacy is not lost—it is unproven in visible ways.

Americans still believe in higher education's promise.
They want it to contribute to work, community, and civic life.
They simply need to see it.

The Higher Education Narrative Initiative is designed to move from assumption to evidence, from abstraction to proof, and from defense to visible contribution.

This is a long-term narrative strategy—not a messaging campaign.

If successful, it will strengthen the perceived value of higher education, expand its legitimacy beyond campus constituencies, and position C&S as the catalytic backbone organization driving narrative change across sectors.

WORKPLACE: RECOMMENDED PATH FORWARD

OBJECTIVE FOR TRUSTEES: Understand and endorse a proposed plan to continue current Workplace portfolio exploration, sustain Chamber partnership, and explore credentialing possibilities.

We have reflected on the perspectives shared during the December Board discussion and what they imply for our approach. That conversation surfaced multiple, viable options to workplace engagement, each grounded in different judgments about risk, timing, and focus, outlined below:

Approach	Rationale	Trade-off	Open Questions
1. De-emphasize Workplace portfolio	<i>Discipline:</i> Keeps focus on existing portfolios	<i>Reach:</i> 60% of target audience unaddressed	Future of Chamber partnership? How to message retreat?
2. Workplace = Chamber partnership only	<i>Leverage:</i> Expand our programs using their distribution	<i>Control:</i> One channel, Chamber dependent	How much and at what pace will Chamber invest? With what level of input from us?
3. Continue both Chamber and exploration	<i>Risk management:</i> Get smarter before we invest more deeply	<i>Speed:</i> Slower pace in a rapidly evolving field	What key inputs do we need before we set strategy and invest?
4. Move quickly to own credential space	<i>First mover advantage:</i> C&S shapes the market	<i>Operational risk:</i> Draws critical focus from CP2 & CYL	How do we build expertise and credibility quickly? With what impact on existing work?

We recommend Option 3, proceeding with a learning-oriented path that allows us to better understand the landscape, particularly around credentials, before defining our role and making any material investments.

Several considerations inform this recommendation. While maintaining exclusive focus on existing channels (Option 1) would preserve clarity, we are already operating in this space, engaging, and learning from employers through our partnership with the US Chamber of Commerce Foundation to build Civics Academy, and that work is contracted to proceed regardless. Elevating the Chamber Foundation partnership into a singular workplace strategy (Option 2) feels premature given that we don't yet know what the market demand will be for the Civics Academy product once it is launched nationally, and this approach would limit our engagement to areas where our priorities align with those of the Chamber Foundation. Moving quickly to develop a workplace-facing credential (Option 4) would require significant resources and risk tolerance at a time when we are accelerating existing programs and must stay focused on

delivering on funder commitments. We acknowledge the risk of potentially ceding first mover advantage on a civic skills credential, particularly given related initiatives underway via College Board and Carnegie/ETS, but believe that their focus differs from ours, particularly in terms of the types of skills being measured and credentialed.

The recommended approach (Option 3) builds intentionally from where we are. While we deliver the next phase of Civics Academy for the Chamber Foundation, we would also engage in a **six-month effort to better understand how higher education, students, and employers are translating and understanding civic skills in the context of the workplace**. This would include:

- **An assessment, through research and polling, of credentials currently used or under development across CP2 campuses**, including how and to whom they are presented (e.g., transcript notation, LinkedIn badge, etc.)
- **Focus groups with higher education leaders, students, employers, and civic practitioners** working at the intersection of education, early career pathways, and workplace entry. We would leverage the Chamber Foundation relationship to ensure strong employer participation.

We can accomplish this by leveraging existing staff and relationships and believe it will generate the key inputs we need to create a market-informed strategy for the portfolio.

In six months, we would expect **three concrete outcomes**:

1. **A defined set of priority civic competencies that resonate cross-sector**
2. **A clearer understanding of how those competencies are expressed and valued in the workplace**
3. **A recommendation on whether and how to pursue a credential or other signaling approach for civic competencies**

















This path allows us to move forward in a way that aligns with current commitments, respects resource constraints, and ensures that any future workplace engagement is grounded in evidence and feedback from the field.

ORGANIZATIONAL RISK ASSESSMENT

OBJECTIVE FOR TRUSTEES: Understand management’s assessment of key organizational risks.

Trustees asked that the team assess the potential risks facing the organization in a more systematic and comprehensive manner. As a matter of practice, we regularly incorporate risk assessment into our program plans, maintain focus on budget discipline and building up our cash reserves, and seek to offset risks through specialized insurance, cybersecurity software, and other mitigation tools.

To ensure that we had a wide view on potential threats, the senior team brainstormed potential risks and categorized them by (1) type: reputation (external) risks and execution (internal) risks, (2) timing of impact: acute, immediate impact vs. longer term, and (3) a rating based on a combination of likelihood **and** severity of impact.

Risk	Type	Timing	Rating
Cyberattack	Execution/ Reputation	Immediate	
Overreliance on Raj	Execution	Longer-term	
Politicization or ideological attack	Reputation	Immediate	
Economic downturn or shift in priorities due to other threats impacts philanthropy	Execution	Longer-term	
Competitors outpace us	Execution	Longer-term	
CYL goes unfunded	Execution/ Reputation	Immediate	
Programs fail to have measurable impact	Execution	Longer-term	
Continued financial pressure on higher ed limits our ability to diversify revenue	Execution	Longer-term	
Loss of key staff	Execution	Immediate	
High turnover of staff	Execution	Longer-term	
AI module "goes Grok"	Reputation	Immediate	
Lack of capacity to quickly utilize significant additional funding	Execution	Immediate	
Program participant "goes rogue"	Reputation	Immediate	
Staff member "goes rogue"	Reputation	Immediate	
Funder "goes rogue"	Reputation	Immediate	
IP is stolen or co-opted	Reputation	Immediate	

While mitigation efforts against all of these risks are necessary to some extent, **our primary focus is on mitigations for the top 3: a cyberattack, overreliance on our president (relationships, fundraising) and an ideological attack**, whether from the administration or other political actors. Here is our in-depth mitigation to each of the top 3:

Cyberattack: A little over a year ago, after a failed phishing attempt could have resulted in a \$200,000 loss to the organization, we implemented new security software, training, and internal financial practices. We also outsourced our IT support to an external vendor to leverage ongoing expertise and updates. Next quarter, in an effort to improve both service levels and our level of risk mitigation, we'll be moving to a new, more advanced (and somewhat more expensive) IT vendor. **We believe we have strong mitigations in place, but complete mitigation in this area isn't possible,** given both the human factor and ever-increasing sophistication of these types of attacks.

Overreliance on President: Last year, we took out a new \$5M Key Man insurance policy on Raj. This would give us extra funding in the event of Raj's death or disability, so that the organization could better absorb any loss of existing funding (certain College Presidents grants allow the funder to rescind commitments if Raj is no longer President) and seek new leadership and new funding relationships.

This risk also applies to operating relationships with leaders in higher education, civic education, and others in the field. To mitigate against this risk, the senior team is endeavoring to take a more external posture this year and to step in more regularly for Raj at events and field-wide gatherings. With respect to higher ed specifically, Beverly and the CWI team are developing deep relationships with both presidents and cabinet-level leaders that would allow more campus relationships to continue without Raj if necessary.

We believe we have an appropriate amount of financial safeguard in place against this risk but need to continue to focus on operational efforts to increase senior staff visibility and management of key relationships.

Politicization or ideological attack: To date, we have mitigated this risk by maintaining a publicly nonpartisan and crosspartisan stance and deliberately seek out a diverse group of funders, college presidents, program participants, and field partners. We also have a reputation and crisis communications workflow in place. However, this is no guarantee that any of our people, programs, or partnerships might not come under political or cultural scrutiny from the current administration or other actors. At the same time, we struggle to engage publicly about our values, positions, and perspectives – especially in the current climate – in ways that reflect the mission of C&S and the importance of civic engagement in our democracy. **This strategic tension between (a) speaking explicitly about current events in a way that may risk politicization and (b) avoiding topics that are mission-aligned in a way that diminishes our relevance and credibility in the field and with young people, will be a topic of conversation during our dinner on Wednesday evening.**



APPENDICES

Appendix A:

Board Meeting Minutes and Notes

- [Minutes, Board Meeting of October 15, 2025](#).....p. A-2
- [Notes, Informal Board Call, November 10, 2025](#).....p. A-4
- [Notes, Informal Board Call, December 15, 2025](#).....p. A-5

DRAFT MINUTES

Meeting of the Board of Trustees, The Institute for Citizens & Scholars Wednesday, October 15, 2025 | Carnegie Corporation (NYC)

Attending: Stefanie Sanford, *Chair*; Jeffrey Goldstein, *Vice Chair*; Matt Blumberg, Jane Donaldson, Glen Lewy, Eric Lindberg, Kent McGuire, Kim Smith, Caryl Stern, Jay Urwitz, Rajiv Vinnakota, Mark Walsh. *Staff:* Morgan Binswanger, Indira Lar-Moore, Jay Geneske, Steve Haddad, Bernard Laryea, Beverly Sanford, Rachel Smith, Audra Watson, Christine Winston, Jamie Berg Wright.

Opening

Board Chair Stefanie Sanford called the meeting to order at 8:47 a.m., welcoming Trustees and staff and thanking the Carnegie Corporation for its hospitality. Trustees reflected on the prior evening's dinner and student engagement session, emphasizing the value of dialogue with young leaders. The minutes of the June 12 Board meeting were approved by unanimous voice vote.

Organizational Progress & Strategy

Management reported that the organization is in one of its strongest strategic and operational positions in recent years. Key performance indicators (KPIs) were reviewed, showing overall progress across strategic goals, with particular strength in recruitment and engagement efforts.

Audit/Finance

Trustees received a positive financial report, including a clean audit and a strengthened financial position due to multi-year grants and increased unrestricted support. The Board voted unanimously to approve the FY '25 audit report. Improved cash flow, expanded cash reserves, and enhanced support for both programmatic and administrative infrastructure were noted. The Form 990 will be circulated to Trustees for review prior to filing.

Trusteeship

Two Board nominees, Ted Delicath and Matt Glotzbach, were unanimously elected as Trustees. The Board had considerable room to add members, with current elected membership now at 16 and an approximate target of 20 members. Areas that need representation on the Board include media and higher education (especially community colleges). Name recognition or celebrity would also be valuable. Some demographic gaps—including age—need attention. Trustees are encouraged to suggest nominees.

College Presidents for Civic Preparedness (CP2)

Trustees discussed leadership turnover among college presidents. Board members also emphasized the importance of institutionalizing C&S' higher education initiatives through faculty, provost, and curricular integration, ensuring sustainability beyond individual presidential transitions. There was some discussion of the desirability of engaging institutional boards, though this remains a relatively low priority for CP2 member presidents.

Carnegie Young Leaders (CYL)

The Board engaged in an extended strategic discussion of the Carnegie Young Leaders program. Leadership reported strong early program performance alongside significant near-term fundraising challenges, including a \$500,000 funding gap for the current year and a projected \$1.8 million need for the subsequent year. Trustees discussed sustainability, donor positioning, program scale, and long-term theory of change. Potential strategies included reframing the program for fundraising purposes, geographic and team-based sponsorship models, and clearer articulation of long-term impact and network effects. The Board emphasized the importance of avoiding reliance on unrestricted funds for ongoing program operations.

Brand Presentation

Under the aegis of the Marketing Strategy Committee, the Board heard a presentation by Yellow Lion regarding a proposed rebranding for Citizens & Scholars. The presentation covered internal brand strategy and purpose, thoughts about audience, style guidelines, and thoughts about the name of the organization, which would not change but would generally be shortened to “C&S.” The new brand would focus on activating young people, including a potential campaign called “The Power of &.” Trustees responded positively to the presentation and said they considered the proposed approach to be very strong.

Workplace

The Board laid out key questions for an initiative to help develop civic skills for young people in workplaces. Trustees urged research and careful consideration about whether and how the market would support training on civic skills that overlap with business-critical skills. There were questions about the extent to which C&S might repurpose existing assets for this market, and about whether those assets might be the “Intel inside” other organizations’ programs. Trustees also suggested contacts with chief HR officers, perhaps through a Faculty Institute-like model.

Organizational Capacity & AI

Staff reported early organizational experimentation with AI tools, including internal training, development of custom tools, and shared learning sessions. Trustees underscored the importance of developing a coherent organizational AI strategy over time.

Executive Session & Adjournment

The Board met in executive session with the President at 12:45 p.m. and in full executive session at 1:10 p.m. The meeting was adjourned at 1:50 p.m.

Respectfully submitted,

Beverly Sanford
Secretary

Summary Notes
Monthly Call, Board of Trustees, The Institute for Citizens & Scholars
Monday, November 10, 2025 | 3:00pm ET

Attending: Stefanie Sanford, *Chair*; Jeffrey A. Goldstein, *Vice Chair*; Matt Blumberg, Jane Donaldson, Matt Glotzbach, Jonathan Holloway, Pete Kirsch, Glen Lewy, Eric Lindberg, Kent McGuire, Caryl Stern, Mark Walsh, Rajiv Vinnakota. *Staff:* Audra Watson, Morgan Binswanger, Jay Geneske, Bernard Laryea, Indira Lar-Moore, Beverly Sanford, Christine Winston, Jamie Berg Wright.

The Board met virtually to discuss strategic framing, measurement, and scaling considerations for the Carnegie Young Leaders (CYL) for Civic Preparedness initiative. Leadership opened by acknowledging prior Board feedback requesting greater clarity in program vision and communication. Audra Watson, Chief of Youth Civic Programs, provided an overview, emphasizing that CYL is intended not as a stand-alone program but as a movement of young people to model and catalyze civic collaboration, democratic engagement, and peer-driven problem solving.

Trustees examined cost structure and scalability, raising questions about per-participant expense and whether alternative models—such as prize competitions or expanded storytelling—might extend reach while lowering unit cost. Staff underscored that narrative amplification and replication of youth action models are central to long-term scale.

Significant discussion focused on measurement and return on investment. Trustees sought clearer articulation of success indicators spanning project outcomes, leadership development, and broader civic influence. Staff cited emerging metrics, including pre/post assessments of self-efficacy and milestone tracking. Trustees encouraged concise project summaries with quantifiable indicators of civic readiness and community impact.

The Board also explored definitions of success—whether rooted in individual project outcomes, peer influence, or wider catalytic effects. Staff noted that each CYL team will directly engage at least 50 peers in person or 150 virtually, supporting a multiplier model of civic participation.

Trustees encouraged deeper engagement with movement-building research, clearer theories of change, and more explicit articulation of catalytic pathways, particularly in light of anticipated civic milestones from 2026–2037. Discussion also addressed optimal scale and the number of leaders required to demonstrate national impact.

Partnership opportunities were discussed, including collaboration with existing youth and civic organizations. Staff also reviewed recruitment and selection processes, with emphasis on engaging diverse youth—including those not already civically involved—and incorporating participants into program design.

Next steps include sharing detailed project lists and metrics, refining success measures, strengthening movement-building theory, and advancing partnership exploration to support scale and sustainability.

Summary Notes
Monthly Call, Board of Trustees, The Institute for Citizens & Scholars
Monday, December 15, 2025 | 3:00pm ET

Attending: Stefanie Sanford, *Chair*; Jeffrey A. Goldstein, *Vice Chair*; Matt Blumberg, Jane Donaldson, Pete Kirsch, Glen Lewy, Eric Lindberg, Caryl Stern, Jay Urwitz, Rajiv Vinnakota. *Staff:* Morgan Binswanger, Jay Geneske, Bernard Laryea, Indira Lar-Moore, Beverly Sanford, Audra Watson, Christine Winston, Jamie Berg Wright.

The Board of Trustees convened virtually to discuss emerging strategy within the organization's nascent Workplace portfolio. Work to date has included a strong pilot with the U.S. Chamber of Commerce Foundation, which the Chamber hopes to expand to 1,000 employers in the coming year. However, management considers this pilot a test case, rather than a template. Broader possibilities in the Workplace portfolio.

The primary strategic discussion, led by Bernard Laryea, centered on development of a workforce credential focused on civic and durable skills. Leadership framed this as an evolution of employer partnerships, including the Chamber collaboration, while positioning the organization to help define and assess civic competencies relevant to workplace success.

Trustees debated strategic pacing. Some emphasized completing current pilots before expansion, while others underscored first-mover advantage amid parallel efforts by peer organizations. A balance is needed between disciplined scaling and proactive field leadership.

Board members discussed at length questions of Ccredential design and measurement methodology. Trustees considered some possible assessment models for competencies such as active listening, problem solving, and constructive dialogue, including binary, rubric-based, and tiered certification approaches. Board members felt there were parallels to professional credentials and employer-recognized assessment systems. The credential was also framed as a pathway to reach young people outside traditional higher education channels, expanding civic skills development to broader workforce populations.

Measurement infrastructure emerged as a central strategic priority. Leadership emphasized alignment across education and workforce programs while avoiding fragmentation from proliferating microcredentials. Trustees discussed employer signaling value, competitive rigor, and potential third-party validation partnerships.

Overall, the Workplace portfolio offers significant opportunities to both strengthen the C&S brand and expand the organization's reach. The session concluded with recognition that further refinement is needed regarding credential scope, assessment mechanisms, employer demand, and funding pathways, alongside continued advancement of workforce partnerships and measurement strategy.

**Appendix B:
Committee Materials and Minutes, Jan.-Feb. 2026**

- [Committee on Trusteeship & Governance](#) p. B-2
- [Program Committee](#) p. B-3
- [Marketing Strategy Committee](#)..... p. B-4
- [Audit/Finance Committee](#)..... p. B-26

DRAFT Minutes:
Committee on Trusteeship & Governance
Board of Trustees of the Institute for Citizens & Scholars
January 28, 2026 | 11:00AM ET | Zoom Call

Attending: Glen Lewy, *Committee Chair*; Stefanie Sanford, *Board Chair*; Kent McGuire, Stefanie Sanford, Raj Vinnakota. *Staff:* Steve Haddad, Beverly Sanford.

Glen Lewy, Committee Chair, called the meeting to order at 11:02 a.m. ET. He opened the discussion by raising the question of whether to add additional Trustees at this time or to pause recruitment in light of the recent onboarding of five new Trustees, several of whom have not yet attended their first meeting.

The Committee generally agreed that the organization should prioritize effective onboarding and integration of recent Trustees before moving forward with additional recruitment, with limited exceptions for candidates whose expertise, availability, or strategic value would warrant immediate action.

Members discussed ongoing efforts to assess and address Board composition and gaps, including representation in media, entertainment, public profile, age diversity, geography, networks, and access to funding resources and networks, as well as fundamental alignment with organizational priorities and objectives. Management will also come back to the Committee with a recommendation on young people's participation on the Board.

By consensus, Raj Vinnakota was asked to explore interest with two prospective candidates regarding potential future engagement, with no immediate nominations advanced.

The Committee also discussed the importance of structured, individual conversations with all Trustees to assess engagement, expectations of service, willingness to continue, and perceptions of Board effectiveness. The Committee agreed that this should be a two-way process focused on both accountability and support. The Executive Committee, the Trusteeship Chair, and the President will discuss further and outline next steps.

In addition, there was brief discussion of the process for setting Board meeting locations, with emphasis on aligning meeting sites to organizational value and strategic purpose.

The meeting was adjourned at 11:44 a.m. ET.

Respectfully submitted,

Beverly Sanford
Secretary

DRAFT Minutes:
Program Committee
Board of Trustees of the Institute for Citizens & Scholars
February 3, 2026 | 4:00PM ET | Zoom Call

Attending: Kent McGuire, *Committee Chair*; Stefanie Sanford, *Board Chair*; Ted Delicath, Kim Smith, Raj Vinnakota. *Staff:* Beverly Sanford, Audra Watson.

The meeting came to order at 4:03 p.m. Kent McGuire, Committee Chair, welcomed members and noted that a deck outlining the “Purpose Project” partnership (working title) had been circulated in advance. He invited management to provide context.

Raj Vinnakota explained that this proposed partnership initiative with More Perfect was designed to accelerate and amplify C&S’ youth civic engagement work in advance of the nation’s 250th anniversary. Audra Watson presented an overview of the project: C&S’ existing Carnegie Young Leaders Fellowship would serve as its core, providing depth of experience to selected young people; a broader, complementary national call to action would engage many more young people in civic activities. The proposal builds on existing C&S networks and operating expertise, and hinges on partnership with established organizations in the youth civic development field.

Committee members engaged in a detailed discussion regarding the strategic rationale, risks, and opportunities associated with entering into a formal partnership. Topics included positioning within an existing ecosystem of long-standing youth and national service organizations, the importance of early and respectful engagement with potential partners, and lessons from past coalition efforts.

Members emphasized that successful collaboration would require significant upfront investment in relationship-building, clarity of roles, and careful attention to how leadership, visibility, and outcomes are shared among partners. Discussion also focused on the potential conflict of interest involved in both raising funds for a C&S program and positioning C&S to raise funds for a coalition. The Committee identified several strategic questions, including clarity on funding, key performance indicators, staffing implications, opportunity costs, and the longer-term impact on C&S’ mission and positioning.

The Committee agreed that management should refine the proposal, explicitly articulate tradeoffs among available options, and clarify how partnership success would be measured. Recommendations will be brought to the full Board at the February meeting.

The meeting was adjourned at 5:02 p.m. ET.

Respectfully submitted,

Beverly Sanford
Secretary

DRAFT Minutes:
Marketing Strategy Committee
Board of Trustees of the Institute for Citizens & Scholars
January 29, 2026 | 11:00AM ET | Zoom Call

Attending: Mark Walsh, *Committee Chair*; Stefanie Sanford, *Board Chair*; Matt Blumberg, Matt Glotzbach, Glen Lewy, Jay Urwitz, Raj Vinnakota. *Staff:* Jay Geneske, Christine Winston, Beverly Sanford, Lindsay Smith.

Mark Walsh, Chair, called the meeting to order at 11:02. Jay Geneske outlined objectives: alignment on marketing goals, partnership development for the &You campaign, and orientation to the refreshed brand strategy.

Mr. Geneske presented the new brand framework, including audience priorities and the positioning concept “The Power of &,” reflecting integrated civic skill development. He focused in particular on the planned announcement of a bold public commitment, formulated as a BHAG: “By July 2029, spark 25 million young people to step up as civic problem-solvers.” This number will approximately 3.5 million reached through existing programs and 20+ million activated through the proposed &You platform in connection with the nation’s 250th anniversary.

The Committee reviewed brand relaunch plans, digital assets, and a public participation commitment tied to youth civic activation. Discussion included fundraising visibility, brand engagement mechanics, and coordination with programmatic delivery.

Marketing priorities were outlined: expanding reach and strengthening influence through the &You campaign targeting youth audiences. Mr. Geneske outlined partnership categories where the Marketing Committee can assist with introductions and guidance, including entertainment, media, gaming, and experiential events. Members explored various partnership pathways and contacts.

The Committee affirmed its role in opening partnership channels and advising on brand alignment.

The meeting was adjourned at 12:00 p.m.

Respectfully submitted,

Jay Geneske
Chief Communications & Engagement Officer



Marketing Strategy Committee

Brand Relaunch

JANUARY 29, 2026

BRAND HOUSE

OUR PURPOSE
A strong and thriving America

PERSONALITY
Driven, Grounded, Open

VALUES
Perspectives, Action, Teamwork

AUDIENCE WE TARGET
Changemakers who are eager to do their part to restore connection in America

DRIVING INSIGHT
I need solutions for fostering civic collaboration because political polarization is threatening my community's future but traditional organizations run on outdated ideas that are perpetuating the problem.

BRAND BENEFIT
C&S sparks young Americans to create bold, fresh solutions to civic problems

PRODUCT: Civic Engagement Coalitions and Frameworks

RIGHTS TO PLAY

RIGHTS TO WIN

Relevance

Youth coded
Works for today's reality, not yesterday's ideals
Practical applications & benefits

Engagement

Provide opportunity to participate
Supply civic education where needed

Agile Actions

Gets it done
Enters any situation to build what is needed
Adapts to culture/crisis

Varied Perspectives

YAC
Recruit youth talent at all levels: demo/psycho/socio/eco
Intentional curation of diverse POVs

Potent Reach

Community, Campus, Career
Networks of college presidents
Influential networks

Meaningful Impact

Measurement is a SOP
Outcomes orientation
Constantly improving/seeking feedback

FOUNDATION: Woodrow Wilson Foundation, Decades of Experience, Reputation & Networks



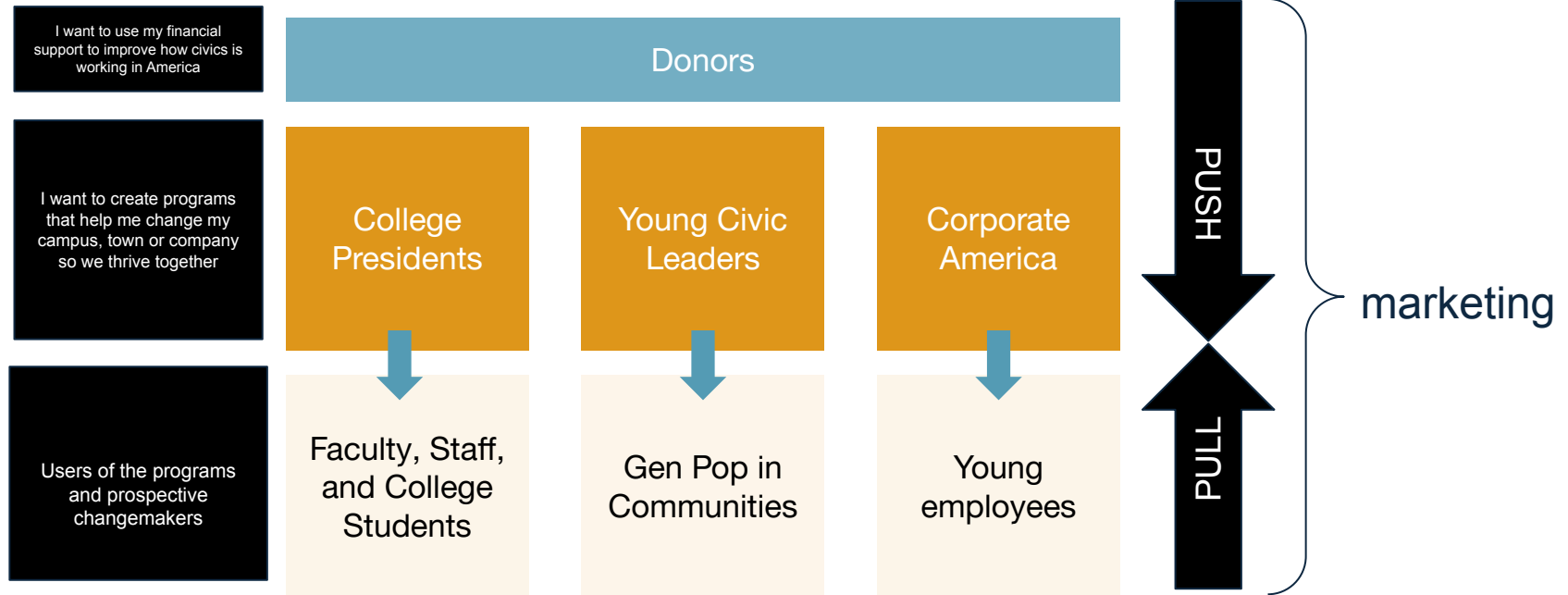
POSITIONING

C&S is a civic engagement catalyst
that **sparks young Americans**
to create bold, fresh solutions
to civic problems

AUDIENCE

CHANGEMAKERS

who are eager to do their part to restore connection in America.





MARKETING GOAL

C&S activates young Americans to create bold,
fresh solutions to civic problems

By giving 3.5 million* the roadmap in
colleges, communities and companies

While also inspiring 20+ million* through **everyday civic actions**

BRAND IDEA

C&S values **participation** and **connection** as the bedrock for civic solutions.

But the brand has sometimes felt exclusive or “elite.”

How do we create new relevance that truly **activates and invites everyone** to join?



*When you feel misunderstood
When you worry the future rests on your shoulders
When you see nothing but raised fists*

*Reach across the table
Talk to a stranger
Ask a meaningful question
Open your mind*

And you will feel...

The Power of &



C&S sparks Gen Z to create bold, fresh civic solutions
that move our country forward.

🔔 New program alert! [Click to read the latest.](#)



[On Campus](#)

[In Community](#)

[At Work](#)

[Resources](#)

[Ways to Donate](#)

[Contact Us](#)

The Power of &

C&S sparks Gen Z to create bold, fresh civic solutions that move our country forward.

[Donate Today](#)



Preparing Every Student for Civic Life.

College Presidents for Civic Preparedness



C&S sparks young people to create bold, fresh civic solutions that move our country forward.





UNLOCKING THE POWER OF AMERICA'S YOUNG PEOPLE

The Institute for Citizens & Scholars and More Perfect are teaming up to launch **The Purpose Project**, a once-in-a-generation effort to unleash youth leadership at a moment when our country needs it most.

The initiative pairs a **rigorous leadership program** – the Carnegie Young Leaders for Civic Preparedness Fellowship – with a **bold national call to action** that invites young people across the country to contribute to their communities.

Together, these efforts will catalyze the next generation of young leaders: training Fellows in every state, mobilizing **100,000+ young people to take action**, and inspiring millions more through visible examples of youth-led civic change.

The 250th is just the beginning. The Purpose Project is designed to grow into a durable national community of young leaders whose energy, ideas, and leadership will strengthen our communities – and our democracy – for decades to come.



SHAMBHAVI SINHA

SAN MARCOS, TX

Shambhavi grew up with asthma and knows firsthand what bad air quality is like. Her team, the **Breathe Well Campaign**, is helping vulnerable communities breathe easier by distributing “Breathe Well Bags,” donating air purifiers, and sharing multilingual resources.



DAVID JEN

PENNINGTON, NJ

After the pandemic, rising anti-Asian hate hit David’s family and community close to home. That experience led his team, **Learn AAPI History**, to create student-friendly AAPI history resources, host workshops, and push for curriculum change so AAPI stories are taught in schools.



AVIVA WRIGHT

ATLANTA, GA

Aviva and the **Stuff of Cities** team are asking a simple question: what if buildings didn’t have to become waste? By advocating to expand Georgia’s Sustainable Redevelopment Tax Credit, they aim to keep usable materials out of landfills, lower construction costs, and create green jobs.

Video podcast series:
Generation Citizen

Different Generations.
One Country.





LAUNCH FEB 25TH - ANNOUNCEMENT

C&S will spark 25 million* young people to step up as civic problem-solvers by July 2029.

- \$25 million* investments from Einhorn, Stand Together, Carnegie, etc. and lead partners including Chamber of Commerce, Be the People, The Fulcrum, etc. that add up to real momentum for the country.
- The “&You Campaign” to launch with 250th, a partnership with More Perfect to spark 20 million* young people to learn and take everyday civic actions.

C&S PROGRAMS

reach

3.5 million*

objective

Selling coalitions and frameworks

target

College presidents, faculty

Corporate HR

Young civic leaders

strategy

Laser targeted

Conversion focus

Warm prospects

Owned tactics

C&S Brand role

Forefront as credible partner

&YOU CAMPAIGN

reach

20+ million*

objective

Creating affinity and building demand

target

Teenagers

College students

Young adult workforce

strategy

Mass reach

Awareness focus

Cold prospects

Paid, Earned, Shared tactics

C&S Brand role

Minimal: 'endorser' of the campaign

&YOU – CAMPAIGN DEVELOPMENT

- Agency/Firm to develop and execute the *&You* campaign; owned, paid, earned
- Platform and conversion point to get information, inspiration, merch and build community
- **Status:** Fundraising JV with More Perfect
- **Committee Ask:** Ideas on agency/firm




&YOU - CONTENT/STREAMING

- Podcasts, scripted series, content in different formats
- Similar in style to Jubilee Media; Hot Takes; Broski Report
- **Status:** Not started
- **Committee Ask:** Contacts at production companies, podcast platforms



&YOU – NEWS APP PARTNERSHIP

- Brand partnership with news app, like InPress, focused on using civic skill of credible information
- Reaches target audience in native format
- **Status:** InPress contact established
- **Committee Ask:** Contacts at other News Apps





InPress is the first gamified, social news app that makes consuming reliable news fun.

Consume real news from vetted outlets via swipable summaries of articles and an intuitive rating system.

Create authentic connections through AI-driven social matching features. No politics. No echo chambers. Just credible news creating authentic connections.

Every article rating builds your media literacy streak (InScore) while helping you grow, learn, and unlock the fun in facts.

Download on the  **App Store** GET IT ON  **Google Play**

Turn staying informed into something you actually look forward to. InPress combines curated, credible journalism with interactive features that reward you, socially and personally, for reading and rating the news.

Looking for new connections? Create a "News + Social" account to discover dates or friends who share your subconscious interests based on how you process the news. Think Spotify Blend, for everything in the universe. Don't worry, **politics are never part of the algorithm.**

Just want our vetted, gamified news without the matching? Use InPress as your go-to news source with a "Just the News" account. 40% of users do!

Just smart content fueling authenticity and **news is where every story helps you write yours.**

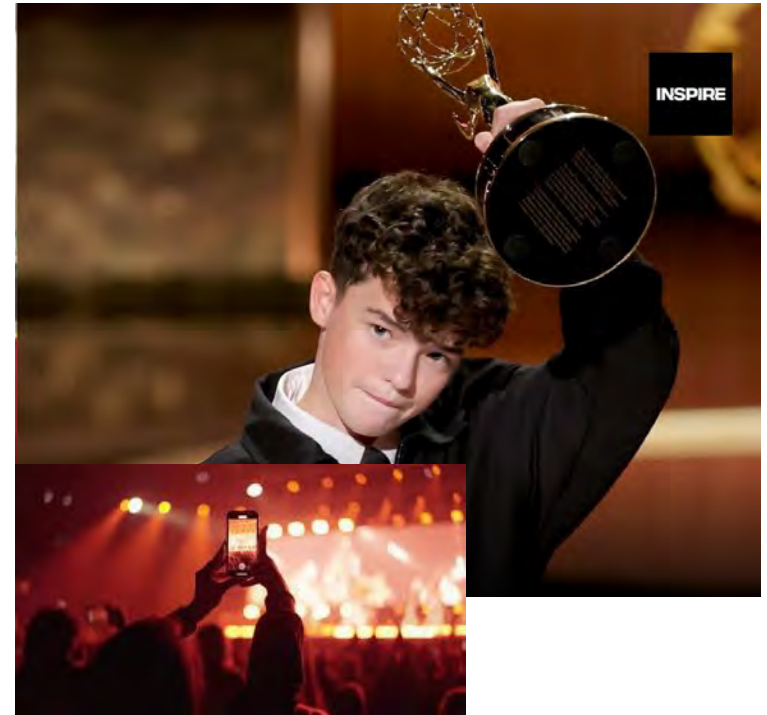
&YOU – GAME DESIGN OR PARTNERSHIP

- Game show that helps two people to find common ground on one thing in order to win money.
- Double Dare + Family Feud + \$100k Pyramid.
- **Status:** Not started
- **Committee Ask:** Contacts with designers or platforms



&YOU – EVENTS & AWARDS

- &You awards shows on campuses, communities, and workplaces, similar to Las Culturistas
- Pop up IRL events to swap algorithms to learn more about how each other sees the world according to social media.
- **Status:** Not started
- **Committee Ask:** Event designers for concept work



Minutes: Audit & Finance Committee
Board of Trustees of the Institute for Citizens & Scholars
February 4, 2026|9:30 AM ET/6:30 AM PT | Videoconference

Attending: Jay Urwitz, Committee Chair. Ted Delicath, Jeffrey Goldstein, Eric Lindberg, Stefanie Sanford, Mark Walsh, Raj Vinnakota. *Staff:* Steve Haddad, Christine Winston, Jamie Berg Wright, and Ann Zawartkay.

Committee Chair Jay Urwitz called the meeting to order at 9:32 AM. The minutes of the previous meeting were approved unanimously.

The Committee first discussed renewal of C&S's engagement with its audit firm, Withum. C&S was pleased with the auditor's responsiveness and timeliness during the FY25 audit. Christine Winston recommended a three-year renewal (FY26-FY28) in order to ensure continuity and secure favorable rates. The Committee supported Ms. Winston's recommendation to renew for three years, but asked that she negotiate the rate downwards. Several Committee members cited nonprofits receiving audit cost reductions due to the integration of artificial intelligence. The Committee agreed that Mr. Urwitz had authority to review and approve the revised rate proposal.

Ms. Winston walked the committee through financial highlights as provided in the materials. Revenue targets were substantially ahead of plan, primarily due to several large grants for the College Presidents initiative. The largest revenue challenge remained Carnegie Young Leaders. Although C&S had not needed to draw on unrestricted funds through 12/31/25, management expected to be short approximately \$200K before the March grant installment. Unrestricted cash was approximately \$844K as of 12/31, representing 5.7 months of unabsorbed operating expenses. This was lower than previous projections, due to slower unrestricted fundraising and lower CP2 earned income.

Mark Walsh asked about the maximum potential CP2 funding. Raj Vinnakota said that the C&S team was putting together an ambitious five-year plan to expand the program, including additional campus subsidies, continued investment in measurement work (a structural advantage for C&S), and increased investment in the "Dialogue in Practice" work. Eric Lindberg wondered whether reflecting substantial net income might dissuade some funders from investing in CP2 initiatives. Ms. Winston explained that net income of \$1.9M included \$1.3M committed for FY27; the remaining \$600K would provide operating capital for early FY27, before additional grant payments arrived.

The Committee then discussed the updated forecast, funding prospects, and cash flow for the Carnegie Young Leaders program. If no further funds were raised for CYL, C&S would potentially use up to \$183K in unrestricted funds to cover existing commitments to the first cohort. To support 100 teams in FY27, \$2.15M would need to be committed by the end of FY26. A backup model with 50 teams would reduce the fundraising need by \$650K, to \$1.5M. C&S was engaged in several promising fundraising conversations and remained optimistic. The Committee briefly reviewed updated P&Ls for admin, workplace, and Fellowships.

Discussion turned to the organization's investment portfolio. Assets were housed at PNC and Mercer. Given the large influx of grant payments, significant cash was currently sitting in the PNC operating account. C&S routinely spends from its PNC account, rather than liquidating its investment holdings, and periodically needs to "true up" balances across the portfolio. Management proposed to move \$3M out of PNC and into various accounts at Mercer in order to receive a higher yield. Going forward, funds would be reviewed and moved from PNC on a quarterly basis. The Committee supported management's recommendation and agreed that a formal vote was not necessary.

All other business being concluded, Mr. Vinnakota provided a brief overview of the relationship with More Perfect, which would be a topic at the Board meeting. The meeting was adjourned at 10:37 AM.

Respectfully submitted,

Jamie Berg Wright
Senior Finance Director



INSTITUTE FOR
CITIZENS &
SCHOLARS

AUDIT & FINANCE COMMITTEE

Feb 4, 2026

Agenda

Administrative business

- Approval of October meeting minutes
- Audit partner contract renewal

Financial update

- Headlines as of 12/31/25
- Revenue tracking
- Forecasts by line of business and overall (including cash flow)
- Investment portfolio update and rebalancing discussion

Actions Anticipated

- Approval of Oct. minutes
- Approval of audit renewal
- Approval on portfolio rebalancing



Audit contract renewal

- FY25 audit was year 3 with Withum, year 2 with current lead partner and team
- Audit went smoothly, with vastly improved process and timeliness compared to FY24
- Withum provided a proposal for 1-3 year renewal term, at our discretion

Management recommendation:

Given our confidence in Withum team and relatively new relationship with both firm and lead partner, renew for 3-year period for both continuity and to secure best rates

	Audit	Tax	Total	% Increase
2024 (actual)	\$31,000	\$5,400	\$36,400	
2025 (actual)	\$32,500	\$5,500	\$38,000	4.4%
2026 (quote)	\$34,000	\$5,600	\$39,600	4.2%
2027 (quote)	\$35,500	\$5,700	\$41,200	4.0%
2028 (quote)	\$37,000	\$5,800	\$42,800	3.8%

Financial Update



Financial headlines as of 12/31/25

- **Revenue forecast increased to \$15.3M**, fueled by robust CP2 funding
- Program **expenses running below budget, but will increase significantly in 2H** as program delivery ramps up
- **Did not draw on unrestricted to fund Carnegie Young Leaders**, but anticipate \$200K draw before next Carnegie payment in March
- **\$844K in unrestricted cash – 5.7 months** of operating expenses
 - \$280K lower than earlier projection, primarily due to timing on unrestricted gifts and lower CP2 earned income
- **Forecasting fiscal year-end unrestricted cash of \$989K (6.7 months)**, slightly under previous forecast of \$1M (7 months)

FY26 Revenue Targets

Revenue (\$ in 000s)	FY 26 Plan	Current Forecast	FY26 Committed	% Committed vs. Plan	% Committed vs. Forecast
Restricted Gifts	9,606	12,099	9,883	103%	82%
<i>College Presidents</i>	4,050	6,725	6,725	166%	100%
<i>Carnegie Young Leaders</i>	3,195	3,104	954	30%	31%
<i>Fellowships</i>	2,098	2,148	2,148	102%	100%
Unrestricted Gifts	1,500	2,553	1,972	131%	77%
Earned Income (Fee-for-service)	750	550	420	56%	76%
Investment Earnings (realized)	170	150			
Total Revenues	12,026	15,352			

- **College Presidents surpassed goal by 66%**; forecast includes \$1.3M in funds raised for future years
- **Main revenue challenge remains Carnegie Young Leaders**, with strong pipeline of prospects (at or near solicitation stage) for the \$2.15M needed to support a second cohort of 100 teams
- Secured renewal on final Fellowship program (\$1.2M over two years; \$600K in FY26)
- True unrestricted (net of one-time gifts from MacArthur Foundation and Lilly Endowment) is slightly behind forecast, but with line of sight to achieving goal
- **Overall revenue forecast of \$15.35M, 27% ahead of plan**

P&Ls by Line of Business



College Presidents: FY26 Actuals & Forecast

College Presidents (CP2) Revenue (\$ in 000s)	Actual a/o 12/31/25		FY26 Plan	Current Forecast
Restricted Gifts	5,450		4,050	6,725
Investment Earnings (realized)*	76		-	-
Earned Income (Fee-for-service)	64		600	350
Total Revenues	5,589		4,650	7,075
Expenses				
Passthroughs	75		150	455
Direct Program	1,611		3,923	4,153
Admin	155		407	461
Total Expenses	1,841		4,480	5,069
Net Income (Loss)	3,748		170	2,006
Starting Cash (7/1/25)			186	254
Earned income xfer to Unrestricted			(336)	(350)
Ending Cash (6/30/26 Fcst)			20	1,910

* Program restricted investment earnings not included in forecast as they are market dependent.

Note: Tables in this document may not foot due to rounding.

Key Takeaways and Changes:

Revenue

- Major cash gifts include:
 - Einhorn: \$1.75M (\$5.75M/3 yrs)
 - John Templeton Foundation: \$1.3M (\$2.6M/3yrs)
 - One8 Foundation: \$1.0M (\$3M/3 yrs)
 - Tepper Foundation: \$1.0M (\$3M/3yrs)
 - Klarman (\$500K), Lumina (\$392K/2yrs), ECMC (\$200K), Stand Together (\$250K)
- Earned income decreased by \$250K based on lower YTD sales

Expense

- Increased investments in campuswide immersion, including staffing and campus subsidies/passthroughs

Ending cash of \$1.9M includes \$1.3M reserved for FY27 commitments

Carnegie Young Leaders: FY26 Actuals & Forecast

Carnegie Young Leaders Revenue (\$ in 000s)	Actual a/o 12/31/25		FY26 Plan	Current Forecast
Restricted Gifts	100		3,195	3,104
<i>Committed</i>	100		854	954
<i>To Be Raised</i>			2,341	2,150
Total Revenues	100		3,195	3,104
Expenses				
Passthroughs	400		900	892
Direct Program	498		1,146	1,008
Admin	135		307	285
Total Expenses	1,033		2,353	2,185
Net Income (Loss)	(933)		842	919
Starting Cash (7/1/25)			948	1,048
Ending Cash (6/30/26 Fcst)			1,789	1,967

Key Takeaways and Changes:

Revenue

- Target reduced slightly to \$3.1M, reflecting lower expense projections
- Raising funds this year to fund both FY26 and FY27 programs, with FY27 program at risk if targets not met

Expenses

- Decreased by approx. \$170K, primarily due to lower event expenses

FY27 Program

- FY26 investments in FY27 program are limited to cost of Cohort 2 recruitment (~\$105K) and related staff time
- Plan in place for potential reduced cohort (50 teams minimum)

FY26 Carnegie Young Leaders Cash Flow Projection

Cash Flow (\$ in 000s)	July-Dec	Jan	Feb	Mar	Apr	May	June
	Actual	Fcst	Fcst	Fcst	Fcst	Fcst	Fcst
Starting Cash on Hand	1,048	116	29	12	551	487	408
Revenues Committed	100	-	-	854	-	-	-
Expenses							
Direct Program	498	121	102	100	55	69	63
Passthroughs	400	42	-	-	-	-	450
Indirect Costs	135	24	15	15	8	10	78
Total Expenses	1,033	187	117	115	64	79	591
Possible Unrestricted Draw	-	100	100	(200)	-	-	183

- Mainly fixed costs for remainder of year: C&S personnel and stipends for current teams and their mentors
- Program **will draw on unrestricted (up to \$200K)** for January and February (to be “repaid” when March Carnegie installment arrives) and may require ~\$183K to close out Cohort 1 in June if no other funds are raised
- **\$2.15M** in funding needed by year end to fund full program of 100 teams in FY27
- Back-up model for 50 team program reduces fundraising lift by **\$650K** (from **\$2.15M** to **\$1.5M**)

FY26 Updated Forecast by Line of Business

Revenue (\$ in 000s)	Admin	Higher Ed	Youth	Workforce	Fellows	Total
Philanthropy	2,553	6,725	3,227	-	2,148	14,653
Earned Income (Fee-for-service)	-	350	-	200	-	550
Investment Earnings (realized)	150	-	-	-	-	150
Total Revenues	2,703	7,075	3,227	200	2,148	15,352
Expenses						
Passthroughs	-	455	892	-	1,128	2,475
Direct Program	-	4,153	1,586	167	878	6,784
Admin	2,510	461	383	33	212	3,598
Total Expenses	2,510	5,069	2,861	200	2,218	12,858
Net Income (Loss)	193	2,006	366	-	(70)	2,495
Starting Cash at 7/1/25	808	254	1,624	-	4,241	6,928
Transfer from Fee-For-Service	350	(350)	-	-	-	-
Ending Cash (6/30/26 Forecast)	1,350*	1,910	1,990	-	4,171	9,423

* Includes \$989k unrestricted and \$361k for Lilly capacity-building grant.

Note: Table does not foot due to rounding.

FY26 Unrestricted Cash Flow Projection

Cash Flow (\$ in 000s)	July-Dec	Jan	Feb	Mar	Apr	May	June
	Actual	Fcst	Fcst	Fcst	Fcst	Fcst	Fcst
Starting Cash on Hand	808	844	780	716	732	677	642
Unrestricted Revenues							
Unrestricted Gifts	368	50	50	50	50	50	370
Lilly/MacArthur Unrestricted	472	-	-	-	-	-	-
Fee-for-Service	164	20	20	150	30	50	116
Investment Earnings	76	13	13	13	12	12	12
Total Unrestricted Rev.	1,080	83	83	213	92	112	498
Unrestricted Expenses							
Unabsorbed Admin	1,026	125	125	125	125	125	127
Exp. against Earned Income	19	22	22	72	22	22	24
Uncovered Program	-	-	-	-	-	-	-
Total Expenses	1,045	147	147	197	147	147	151
Cash Balance	844	780	716	732	677	642	989
Months Unrestricted Cash	5.7	5.3	4.8	4.9	4.5	4.3	6.7
Potential CYL Draw		(100)	(100)	200			(183)
Mos. of Cash with CYL Draw		4.6	3.5				5.4

Key Takeaways:

- Prior forecast was for steady month-to-month balances (range of 5.7-7 months cash) and \$1.04M (7 months) at year end
- Unrestricted gifts and CP2 earned income are coming in later than expected, leading to lower months of cash, but expect to make up ground by year end
- Potential negative impact in June if less than \$200K in additional funds are raised for CYL

Investment Portfolio



Investment Portfolio Overview

- Assets are housed at PNC and Vanguard (managed by Mercer) based on when they are needed
- As we incur expenses, we spend from working capital at PNC rather than selling from investment portfolios, then periodically “true up” balances across accounts

Account	Held at	Target Allocation (Stocks/Bonds)	When \$ Needed	Examples
Working Capital Money Market/Checking	PNC	MMKT Tiered rate for \$2M+ balance	3-6 months	Current year restricted grants (e.g. Einhorn, Carnegie, Mellon) and unrestricted gifts/cash on hand , up to target balance of \$2.5M
Short Term Restricted	Vanguard	MMKT	Less than 1 Year	Current year restricted grants , once PNC balance exceeds \$2.5M
Short Term Unrestricted	Vanguard	MMKT	Less than 1 Year	Unrestricted gifts , once PNC balance exceeds \$2.5M
General Fund - Restricted	Vanguard	20/80	July 2026 onward	Future year program restricted grants (e.g. Mellon years 2-3, Lilly Years 2-3 - restricted portion)
General Fund - Unrestricted	Vanguard	20/80	July 2026 onward	Future year non-program restricted grants (e.g. Lilly Years 2-3 - unrestricted portion)
Longer Term Unrestricted	Vanguard	70/30	N/A	Unrealized, unrestricted earnings
Primary Endowment	Vanguard	70/30	Varied, long term	Taplin, Goheen, other endowments (principal + earnings)

Investment Portfolio Update & Rebalancing

- Total assets of **\$12.2M as of 12/31/25**, with significant cash (**\$5.5M**) at PNC, plus another \$1.6M received in January, **that needs to be earning more for us**
- Recommending rebalancing to “true-up” account balances (as below), moving funds to higher rate-bearing accounts, plus quarterly review/sweeps from PNC to Vanguard short term accounts

Account	Held at	Target Allocation (Stocks/Bonds)	Performance 12-month	Balance at 12/31/25	Proposed Transfer	Proposed NEW Balance
Working Capital Money Market/Checking	PNC	MMKT	2.3%	5,483	(3,000)	2,483
Short Term Restricted	Vanguard	MMKT	3.7%	742	3,900	4,642
Short Term Unrestricted	Vanguard	MMKT	3.8%	90	80	170
General Fund – Restricted	Vanguard	20/80	9.1%	1,518	850	2,368
General Fund – Unrestricted	Vanguard	20/80	9.0%	1,278	(1,100)	178
Longer Term Unrestricted	Vanguard	70/30	17.4%	992	(650)	342
Primary Endowment	Vanguard	70/30	17.3%	2,079	(80)	2,000
			TOTAL	12,182	0	12,182

Appendix C:
Board of Trustees Standing Committee Assignments, 2025–26

AUDIT/FINANCE

Jay Urwitz, *Chair*
Jeffrey Goldstein
Pete Kirsch
Glen Lewy
Eric Lindberg
Mark Walsh
Christine Winston/Jamie Berg Wright,
staff

DEVELOPMENT STRATEGY

Committee of the Whole

HR/COMPENSATION

Matt Blumberg, *Chair*
Jeffrey Goldstein
Jane Donaldson
Kim Smith
Christine Winston, *staff*

MARKETING STRATEGY

Mark Walsh, *Chair*
Matt Blumberg
Matt Glotzbach
Jane Donaldson
Glen Lewy
Caryl Stern
Jay Urwitz
Jay Geneske/Christine Winston, *staff*

PROGRAM

Kent McGuire, *Chair*
Ted Delicath
Eric Lindberg
Kim Smith
Caryl Stern
Beverly Sanford, *staff*

TRUSTEESHIP/ GOVERNANCE

Glen Lewy, *Chair*
Ted Delicath
Jane Donaldson
Jeffrey Goldstein
Kent McGuire
Beverly Sanford, *staff*

AD HOC ADVISORY GROUPS

Virtual Student Module

Matt Blumberg
Matt Glotzbach
Kim Smith
Jay Urwitz

EXECUTIVE COMMITTEE

Stefanie Sanford, *Board Chair*
Jeffrey Goldstein, *Vice Chair*
Matt Blumberg
Christine Winston, *Treasurer*
Rajiv Vinnakota, *ex officio*
Beverly Sanford, *Secretary, staff ex officio*

Stefanie Sanford, *Chair, ex officio* all committees
Jeffrey Goldstein, *Vice Chair, ex officio* all committees
Rajiv Vinnakota, *President, ex officio* all committees

Appendix D:
Trustee Contact Information 2025–2026 (as of February 2026):
(please do not circulate)

Stefanie Sanford *Dr. Stefanie Sanford*
Chair of the Board

Spouse/Partner Name: David Moore

Business Address:

Home Address:

Business 202-746-4357

Email ssanford@alithi.com

Assistant: Sarah Yoshi Anderson

Assistant's email: sarah@alithi.com

C&S Board Affiliation:

First Elected: 10/11/19

Last Elected: 6/16/22

Committees:

Executive Committee

Ex officio all committees

Jeffrey Goldstein *Dr. Jeffrey A. Goldstein*
Vice Chair

Spouse/Partner Name: Nancy Coles Goldstein,
M.D.

Home Address:

107 East 73rd Street

New York, NY 10021

Business Address:

Home: (212) 744-1184

Cell: (646) 226-5040

Email jeffreyalangoldstein@gmail.com

Assistant: Jill Lillis

Assistant's email: lillis8703@gmail.com

C&S Board Affiliation:

First Elected: 10/6/20

Last Elected: 6/9/23

Committees:

HR/Compensation Committee, *Chair*

Ex officio all committees

Matt Blumberg *Mr. Matthew Y. Blumberg*

Spouse/Partner Name: Mariquita Blumberg

Business Address:

Assistant: Andrea Ponchione
Email andrea@acrolinx.com

Home Address:

26 Doris Drive
Scarsdale NY 10583

Email: matt@myblumberg.com
Phone: 917-693-6500

C&S Board Affiliation:

First Elected: 6/9/23
Last Elected: 6/9/23

Committees:

Marketing Strategy Committee, *Chair*
HR/Compensation Committee

Ted Delicath *Mr. Ted Delicath*

Spouse/Partner Name: N/A

Business & Home Address:

124 Keller Street
Bartonville, IL 61607

Email: tdelicat@gmail.com
Assistant: N/A
Assistant's email: N/A

C&S Board Affiliation:

First Elected: 10/15/25
Last Elected: 10/15/25

Committees:

Committee on Trusteeship & Governance
Program Committee

Jane Donaldson *Ms. Jane Phillips Donaldson*
Chair Emerita

Spouse/Partner Name:

‡ Business Address:

Phillips Oppenheim
360 Lexington Avenue, 21st Floor
New York, NY 10017

Home Address:

444 E. 57th Street, PH
New York NY 10022

Business 212-953-1770

Fax 212-953-1775

Email jdonaldson@phillipsoppenheim.com

Assistant Maya Clark

Email mclark@phillipsoppenheim.com

C&S Board Affiliation:

First Elected: 5/8/03

Last Elected: 6/8/17 (*Charter Trustee 2*)

Committees:

Committee on Trusteeship and Governance,

Chair Pro Tem

Marketing Strategy Committee

Matt Glotzbach *Mr. Matthew R. Glotzbach*

Spouse/Partner Name: Krista Glotzbach

Business Address:

1140 Middle Ave
Menlo Park, CA, 94025

Home Address:

1140 Middle Ave
Menlo Park, CA, 94025

Email: matthew@glotzbach.com

Phone: 1.415.255.5559

Assistant: n/a

Assistant's email: n/a

Alt Email: n/a

Phone: n/a

C&S Board Affiliation:

First Elected: 10/15/25

Last Elected: 10/15/25

Committees:

Marketing Strategy Committee

Working Group (VSM)

Pete Kirsch *Mr. Peter A. Kirsch*

Spouse/Partner Name:

Business Address:

Founder and Managing Partner
Blue Marlin Capital Partners
7920 Norfolk Avenue, Suite 200
Bethesda, MD 20814

Email peter@bluemarpartners.com

Home Address:

Assistant: Sidney Wanko

Phone (240) 328-7125

Email sidney@bluemarpartners.com

C&S Board Affiliation:

First Elected: 2/8/24

Last Elected: 2/8/24

Committees:

Audit & Finance Committee

Glen Lewy *Mr. Glen Lewy*

Spouse/Partner Name: Cheryl Winter Lewy

Business Address:

Senior Managing Director
Hudson Ventures
245 Park Avenue, 39th Floor
New York, NY 10067

‡ Home Address:

1057 Constable Drive
Mamaroneck, NY 10543

Business 212-644-9797 (x235)

Cell 914-419-1077

Email glewy@hudsonptr.com

Home 914-777-1492

C&S Board Affiliation:

First Elected: 9/9/12

Last Elected: 6/9/23

Committees:

Audit & Finance Committee

Committee on Trusteeship & Governance

The Institute for Citizens & Scholars
Board of Trustees 2025–2026 (FY26—as of February 2026):
CONTACT INFORMATION (*please do not circulate*)

Eric Lindberg *Mr. Eric Lindberg*

Spouse/Partner Name: n/a

Business Address:

2807 Allen St #807
Dallas TX 75204

Home Address:

Email: elindberg@aekfoundation.org

Phone: 212-518-3322

C&S Board Affiliation:

First Elected: 6/12/25
Last Elected: 6/12/25

Committees:

Audit & Finance Committee
Program Committee

Kent McGuire *Dr. C. Kent McGuire*

Spouse/Partner Name: Eva (Yvonne)
Montgomery-McGuire

Business Address:

Cell: 404-583-7770
Email: m McGuirekent1@gmail.com

Home Address:

140 Lochland Circle
Roswell, GA 30075
Home phone: 404-583-7770

C&S Board Affiliation:

First Elected: 6/16/22
Last Elected: 6/16/22

Committees:

Program Committee, *Chair*
Committee on Trusteeship & Governance

Kim Smith *Ms. Kimberly Carsten Smith*

Spouse/Partner Name: Bill Bradbury

Business Address:

1029 McCormick Lane
Napa, CA 94558

Home Address:

1029 McCormick Lane
Napa, CA 94558

Cell (415) 601-4822

Email kim@thelearnerstudio.org

Assistant: Katherine Moore

Email: katherine@thelearnerstudio.org

Committees:

Program Committee
HR/Compensation Committee

C&S Board Affiliation:

First Elected: 6/16/21
Last Elected: 6/13/24

The Institute for Citizens & Scholars
Board of Trustees 2025–2026 (FY26—as of February 2026):
CONTACT INFORMATION (*please do not circulate*)

Caryl Stern *Ms. Caryl M. Stern*

Spouse/Partner Name: Donald LaRosa

Business Address:

Chief Impact Officer
LionTree LLC
745 Fifth Avenue
New York NY 10151
Email: cstern@liontree.com
Cell: (646) 498-7801

Home Address:

211-25 34th Road
Bayside, NY 11361

Email: caryl.m.stern@gmail.com

Phone: (646) 498-7801

Assistant:

Camille Fairbairn
Email: cfairbairn@liontree.com
Phone: (503) 320-6842

Committees:

Marketing Strategy Committee
Program Committee

C&S Board Affiliation:

First Elected: 2/8/24
Last Elected: 2/8/24

Jay Urwitz *Mr. Jay P. Urwitz*

Spouse/Partner Name: Marilyn Urwitz

Business Address:

Business phone:
Assistant:
Business email:

‡ Home Address:

Apt. 401
800 25th St NW
Washington DC 20037

Cell 202-253-3266

Home 202-849-6115

Email jay.urwitz@gmail.com

C&S Board Affiliation:

First Elected:
2/14/08–6/30/15
6/7/18–6/16/21
Last Elected: 6/16/21 (*Charter Trustee*)

Committees:

Audit & Finance Committee, *Chair*
Marketing Strategy Committee

The Institute for Citizens & Scholars
Board of Trustees 2025–2026 (FY26—as of February 2026):
CONTACT INFORMATION (*please do not circulate*)

Raj Vinnakota *Mr. Rajiv Vinnakota*
President

Spouse/Partner Name: Catherine J.M.
McKenna

‡ Business Address:

President
The Institute for Citizens & Scholars
104 Carnegie Center, Suite 301
Princeton, NJ 08540

Home Address:
49 Main Street
Yarmouth, ME 04096

Cell 202-246-7085
Email vinnakota@citizensandscholars.org
Assistant Rachel Jean Smith
Assistant's email
rsmith@citizensandscholars.org

C&S Board Affiliation:
First Elected: *ex officio*
Last Elected: *ex officio*

Committees:
Executive Committee
Ex officio all committees

Mark Walsh *Mr. Mark L. Walsh*

Spouse/Partner Name: Polly Vail

Business Address:
6405 Garnett Drive
Chevy Chase, MD 20815

Home Address:
614 Cooley's Pond Rd.
Gibson Island, MD 21056

Cell 301-825-5715
Email walsh@ruxtonventures.com

Home phone: 301 657 3620
Personal email: markwalsh@me.com

Assistant: Magic Service
Assistant's email:
walsh.magic@mg.magic.gd

C&S Board Affiliation:
First Elected: 6/16/21
Last Elected: 6/13/24

Committees:
Audit & Finance Committee
Marketing Strategy Committee

Appendix E:
Trustee Biographical Information (as of February 2026):
italics = date first elected to Board



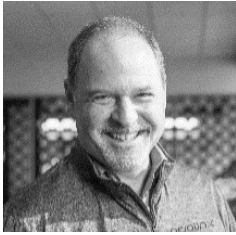
STEFANIE SANFORD, *Chair*
(10/11/19)

Stefanie Sanford served for a decade as Chief of Global Policy & External Relations for the College Board. In that post she led the College Board's Washington Office and directed Policy, Government Relations, and Communications & Marketing. Dr. Sanford came to the College Board after a decade with the Bill & Melinda Gates Foundation. She is a member of the board of America's Promise Alliance, a trustee of the Thomas B. Fordham Institute, and the author of *Civic Life in the Information Age: Politics, Technology, and Generation X*. She graduated from Texas Christian University before earning an MPA from the John F. Kennedy School of Government at Harvard University and a Ph.D. from the University of Texas at Austin.

JEFFREY A. GOLDSTEIN, *Vice Chair*
(10/06/20)

Jeffrey Goldstein is a Senior Advisor and a member of the Investment Committee of Canapi Ventures, a venture capital fund specializing in financial technology companies. He was the Chief Executive Officer of SpringHarbor Financial Group LLC, and a Senior Advisor at Hellman & Friedman LLC, a private equity fund. He served as Managing Director at Hellman & Friedman from 2004 to 2009 and from 2011 to 2016. From 2009 to 2011, Goldstein served as Under Secretary of the Treasury for Domestic Finance and Counselor to the Secretary of the Treasury. Before Hellman & Friedman, Dr. Goldstein served as Managing Director and Chief Financial Officer of the World Bank and was Co-Chairman of BT Wolfensohn and previously was Vice Chairman and a Partner at James D. Wolfensohn Incorporated. Dr. Goldstein serves on the board of directors of Bank of New York Mellon Corporation, Fidelity National Information Services, Inc. (FIS) and Exeter Finance and on the board of trustees of Vassar College and of Equality Now. He earned his Ph.D., M.Phil., and M.A. in Economics from Yale University and his B.A. in Economics from Vassar College, and he attended the London School of Economics.





MATT BLUMBERG

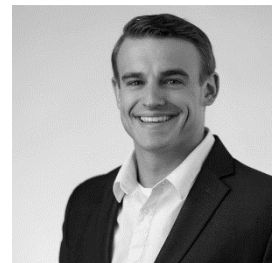
(06/09/23)

Matt Blumberg is a multi-time founder and CEO of technology businesses over the last 30 years. He is currently CEO of Acrolinx, the global leader in AI-powered content governance for the enterprise. Matt is also Founder & Chairman of Bolster, a disruptive platform for executive search that has conducted over 100 searches for directors of private, public, and nonprofit companies and previously served as founding executive of the MovieFone.com division of 777-FILM and Chairman & CEO of Return Path. He has authored three books on startup leadership and hosts The Daily Bolster, a popular podcast for entrepreneurs. Recognized as one of New York's 100 most influential technology leaders by *Business Insider*, by Crain's as one of New York's Top Entrepreneurs, and by Ernst & Young as an Entrepreneur of the Year finalist, Mr. Blumberg has served on numerous corporate, nonprofit, and community boards, and chaired the Board of the Direct Marketing Association. He completed a brief assignment as founder/leader of Colorado's COVID-19 Innovation Response Team in 2020. Mr. Blumberg graduated from Princeton University with an A.B. in urban planning in 1992.

TED DELICATH

(10/15/25)

Ted Delicath is the fortunate product of a mother who made the best of a bad situation, enabling him to help those with good intent drive impact. As of 2026, he's regularly helping [Unite America](#), [Skillcraft](#), & [McChrystal Group](#). A former active-duty military officer, Ted still serves in the Army Reserves despite not looking great in green. He's most proud of the [Andrew Weishar Foundation](#) community which he and his friends started after their best friend (Andrew) passed away from colon cancer. Those same friends say he "does school too much," which has led him to Ireland as a Mitchell Scholar, St. Louis as a CORO Fellow, Denver as an Urban Leader Fellow, and back to Chicago to graduate from Kellogg. Self deprecation (if not yet obvious) is his love language, and while he doesn't take himself too seriously, he believes where we invest our time reveals our values, which is why he's humbled to participate on the C&S Board.





JANE PHILLIPS DONALDSON, *Chair Emerita*

(05/08/03)

Jane Donaldson is co-founder of the Phillips Oppenheim Group, an executive search firm for nonprofit organizations. Previously she spent over ten years in university administration as Dean of Admissions at Wesleyan University, Associate Director of Undergraduate Admissions at Yale University, and as the Yale School of Management’s founding Director of Admissions and Placement. In the early 1980s, she managed a successful campaign for the United States Congress and raised over \$1 million for subsequent campaigns. She holds undergraduate and graduate degrees from the University of Illinois, and is Immediate Past Chair of the University of Illinois Foundation. She is also a director of StoryCorps. She is a former chair of the board of the Ackerman Institute and of Jobs for the Future, and is a former trustee of Bennington College and the Allen-Stevenson School.

MATT GLOTZBACH

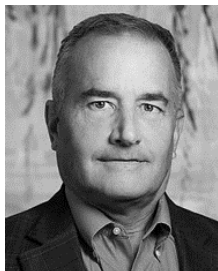
(10/15/25)

Matthew Glotzbach is the former CEO of Quizlet, where he scaled the company to over 60 million monthly learners worldwide, growing revenue more than 30 times and increasing its valuation to over \$1 billion. He built and led a global team of 300+ employees and continues to serve on Quizlet’s board of directors. He also serves on the boards of Berkeley Executive Education and the Computing Talent Initiative, and works with startup founders and executives as a coach and advisor.



Previously, Matthew served as Vice President of Product Management at YouTube, where he oversaw the Subscription businesses, led the global Creator product group, and served as Managing Director for EMEA. Earlier at Google, he launched Google Apps (now Google Workspace) and headed the Apps and Enterprise product divisions. He began his career at Trilogy Software in Austin, Texas.

Matthew holds a degree in mechanical engineering from Cornell University. His work has centered on building products and teams at the intersection of consumer technology and business, with a focus on driving scale and lasting impact.



PETER A. KIRSCH

(02/08/24)

Pete Kirsch is the Founder and Managing Partner of Blue Marlin Capital Partners, a unique direct investment platform for family offices and high-net-worth individuals representing a variety of industry sectors. He founded Blue Marlin in 2016. Since then, Blue Marlin has executed a number of successful investments to exit in a variety of industries and currently has more than \$650 million invested in 27 portfolio companies. From 2000 to 2010 Mr. Kirsch served as Chief of Staff for the founding CEO and Chairman Emeritus of America Online, where he oversaw a wide range of activity including financial management, direct investments, international relations and local and international philanthropy. He also served as senior advisor to the International Commission for Missing Persons (ICMP) for the U.S. Department of State, traveling often to Iraq and the Balkans to advise ICMP on their mission of identifying the missing using state-of-the-art DNA technology. A current and past director for more than 20 corporate and nonprofit boards, Mr. Kirsch also served as a public relations and marketing consultant for a number of years. He is a 1984 graduate of Marquette University.

GLEN LEWY

(02/07/20)

Glen Lewy is a technology investor who serves as a Senior Managing Director of Hudson Ventures, a Senior Advisor to Root Ventures and a member of the New York Angels. Prior to his involvement in venture capital, Mr. Lewy had a distinguished career in investment banking and law, serving as a senior partner and member of the Management Committee of Wolfensohn & Co., a member of the Management Committee and co-head of M&A of Bankers Trust Company, Chairman of Quayle Munro Limited, and a partner at the law firm of Debevoise & Plimpton. He is the former Chairman of the Anti-Defamation League National Commission and is currently a member of the Board of Directors of ADL and President of the ADL Foundation. He is also a member of the Council of Foreign Relations and was a Trustee of the New-York Historical Society and the SEED Foundation. Mr. Lewy holds a B.A. degree from Amherst College and a J.D. from the University of Chicago Law School.



ERIC LINDBERG

(06/12/25)

Eric Lindberg is the Chief Investment Officer and Trustee of the Austin E. Knowlton Foundation and operates an environmentally responsible working ranch in rural Texas. While Mr. Lindberg's current primary focus is

philanthropy and ranching, he has more than 25 years of experience in senior leadership roles at global private equity firms including The Blackstone Group, Hicks, Muse, Tate & Furst and Lion Capital; in addition to his investing roles, he has served as CEO and in other senior positions overseeing portfolio businesses across various industries. Mr. Lindberg also serves as Trustee of Denison University and has served on numerous public and private company and philanthropic boards in the United States and internationally. He holds a BA from Denison University, an MBA from Harvard Business School and multiple FAA jet type ratings.

KENT McGUIRE

(06/16/22)

Kent McGuire is the Program Director of Education at the William and Flora Hewlett Foundation. He was previously President and CEO of the Southern Education Foundation, an organization committed to advancing public education in the American South, with a focus on equity and excellence. Prior to that, he served as the Dean of the College of Education at Temple University and was a tenured professor in the Department of Educational Leadership and Policy Studies. From 2001 to 2003, Dr. McGuire was a senior vice president at the Manpower Demonstration Research Corporation. He has also been an education program officer at the Pew Charitable Trusts and directed the education program at the Lilly Endowment. He served as Assistant Secretary of the U.S. Department of Education from 1998 to 2001. Dr. McGuire earned his Ph.D. in public administration from the University of Colorado, an M.A. from Columbia University Teacher's College, and a B.A. in economics from the University of Michigan. He serves on the boards of the Wallace Foundation, the Institute for Education Leadership, and the Panasonic Foundation.



KIM SMITH

(06/16/21)

Kim Smith, founder of the Pahara Institute, is widely recognized as an innovative and entrepreneurial leader in education. Immediately prior to the Pahara Institute, Ms. Smith was co-founder of Bellwether Education Partners, a nonprofit organization working to improve educational outcomes for low-income students. Earlier in her career she served as a founding team member at Teach For America, created and led an AmeriCorps program for community-based leaders in education, managed a business start-up, and completed a brief stint in early online learning at Silicon Graphics. After completing her MBA at Stanford University, she co-founded and led NewSchools Venture Fund, a philanthropy focused on transforming public education through social entrepreneurship, where she helped to catalyze a new, bipartisan, cross-sector community of entrepreneurial change agents for public education. Ms. Smith has helped to incubate and guide numerous education and social change organizations, and has authored or co-authored a

number of publications about innovation and social entrepreneurial change in education. A Henry Crown Fellow at the Aspen Institute and a member of the Aspen Global Leadership Network, she is also currently Entrepreneur in Residence at Marshall Street Initiatives.

CARYL M. STERN

(02/08/24)



Caryl Stern is the Chief Impact Officer at LionTree, an independent investment and merchant bank with deep roots in the media, technology, communications, consumer, and creative industries. The former Executive Director of the Walton Family Foundation (2020–2023), she previously served for 14 years as President and CEO of UNICEF USA, and, before that, as Senior Associate National Director and Chief Operating Officer at the Anti-Defamation League; the founding director of its A WORLD OF DIFFERENCE® Institute; and the Dean of Students at Polytechnic University. Ms. Stern was invited to present at the White House’s inaugural summit on The United State of Women and was named one of “25 Women Changing the World in 2017” by People Magazine. She serves on the boards of directors of The Container Store and the We Are Family Foundation, in addition to being a member of the Chime for Change Advisory Board. The recipient of five honorary doctoral degrees, Ms. Stern earned a bachelor’s degree in studio art and a master’s degree in college student personnel administration, and completed her Ph.D. coursework in the same field.



JAY URWITZ

(02/14/08; 06/07/18)

Jay Urwitz is Senior Deputy General Counsel for Special Projects for the State University of New York System. He also serves as a Senior Fellow at the American Council on Education, a Senior Fellow in Higher Education at the Center for American Progress, and the President of Urwitz LLC, an education consulting company. Prior to his current positions, he was Deputy General Counsel for Higher Education at the United States Department of Education from 2015 to 2017, and a partner at WilmerHale LLP, which he joined in 1985. Mr. Urwitz was Legislative Assistant for Domestic Policy to Senator Edward M. Kennedy from 1977 to 1981. Mr. Urwitz graduated from the State University of New York at Binghamton, received an M.P.P. from Harvard’s Kennedy School of Government, and completed his J.D. at Harvard Law School, where he was a Senior Editor of The Harvard Law Review. He has written on public policy issues for such publications as The New York Times, The Wall Street Journal, The Washington Post, Education Week, The National Law Journal, and many others. He is also a Trustee of Teachers College, Columbia University.

MARK WALSH

(06/16/21)

Mark Walsh is a board member and venture/angel investor in startup companies. He served in the Obama administration as head of the Office of Investment and Innovation for the U.S. Small Business Administration. He previously was the executive chairman of Homesnap.com, a Revolution Ventures investment. Mr. Walsh’s career has revolved around technology entrepreneurship and non-profit leadership. He has held senior management positions at GE and AOL and was the CEO of VerticalNet, a business-to-business portal provider. He has been CEO, board member or board chair of many high-growth private and public companies. Mr. Walsh also served as the first CTO of the Democratic National Committee in Washington, DC. He was the chairman of the board of trustees for his alma mater, Union College (NY), the University of Maryland’s Dingman Center for Entrepreneurship and the Bipartisan Policy Center—where he remains a board member. He currently chairs the New Leaders Council. He has a B.A. from Union College and an M.B.A. from Harvard Business School.

