

# Change Management

*Strategies to Help Nonprofit Leaders Make the Most of Uncertain Times*

Anne Sherman

It was 1999, and Jim Wendorf, the Executive Director of the National Center for Learning Disabilities (NCLD), faced a significant challenge. For the past two decades, NCLD had been running “warm-lines,” telephone information lines intended to give parents an easy way to receive counsel and advice. The organization began to find it increasingly difficult to raise money for this particular type of service as foundation and corporation interest waned. Furthermore, while there was government money available, federal contracts were generally awarded earmarked for organizations providing a much broader scope of disabilities services, and NCLD wanted its services to remain focused on learning disabilities. Wendorf also had observed that the most successful of NCLD’s competitors were increasingly offering programs and services in a Web-based environment and that there was a gap in offerings targeted to the needs of young children. In addition, while Wendorf wanted to standardize the quality of information NCLD was disseminating, it quickly became clear that NCLD needed to think about how to use its website more strategically and more comprehensively.

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Whether the glass is half empty or half full, what we are fundamentally talking about is change.

Understanding that there were critical decisions to be made, Wendorf, his board, and senior team embarked on a journey that ultimately transformed NCLD and its reputation in the learning disabilities community. Today, NCLD is recognized as a leader and innovator in the field. While the process of change was successful, it was not easy. Wendorf had to manage the opinions, concerns, and perspectives of his board, his staff, and his funders. Not everyone initially supported the drastic changes. Many eventually came on board, but others had to move on. The change itself occurred over a period of many years and at least two strategic planning processes. Even today, Wendorf and his team still manage the tradeoffs inherent in the choices they made to strengthen NCLD. NCLD lost direct, daily contact with its constituents but gained much more with respect to program capacity and quality, in addition to efficiency and effectiveness.

In today's operating environment change is a reality that cannot be ignored. Economic fluctuations, impending leadership crises, increasing need in the community...the list gets long very quickly. But there is good news, too. Every day, the sector is learning more about what constitutes a strong, professional nonprofit organization and how to increase programmatic impact. The rise of Web 2.0 promises to change the way we engage donors and constituents. And, with the increased professionalization of the sector, we are seeing a growing number of bright and idealistic professionals who have received formal training in management—either from a for-profit or nonprofit perspective—and want to apply their skills to social causes.

Whether the glass is half empty or half full, what we are fundamentally talking about is change. Nonprofits are buffeted every day, from all directions, by changes large and small. Change is not inherently good or bad; in fact, in many cases it is probably a mixture of both. You win that big government contract—congratulations!! But wait—where do you put those new people? And how are you going to manage to comply with yet another set of reporting requirements? Or maybe your longtime and beloved office manager resigns. That's a big loss to you and the agency, but it also opens the door to bring in someone with new skills, promote a rising star, and/or start documenting some of the processes your office manager handled but had never put down on paper.

TCC Group, a management consulting firm that works with nonprofits, foundations, and corporate community involvement programs, has watched nonprofit organizations engage in change processes for nearly 30 years. In that time, we have learned some things about organizational change and how to lead a successful change process. In this article, we look at change primarily through the lens of leadership—both staff and board. We offer insights we have learned and suggest ways in which nonprofit leaders can maximize their chances of ushering a successful change process through their organization.



# Thinking About Change Through a Broader Organizational Framework

## The Core Capacity Model

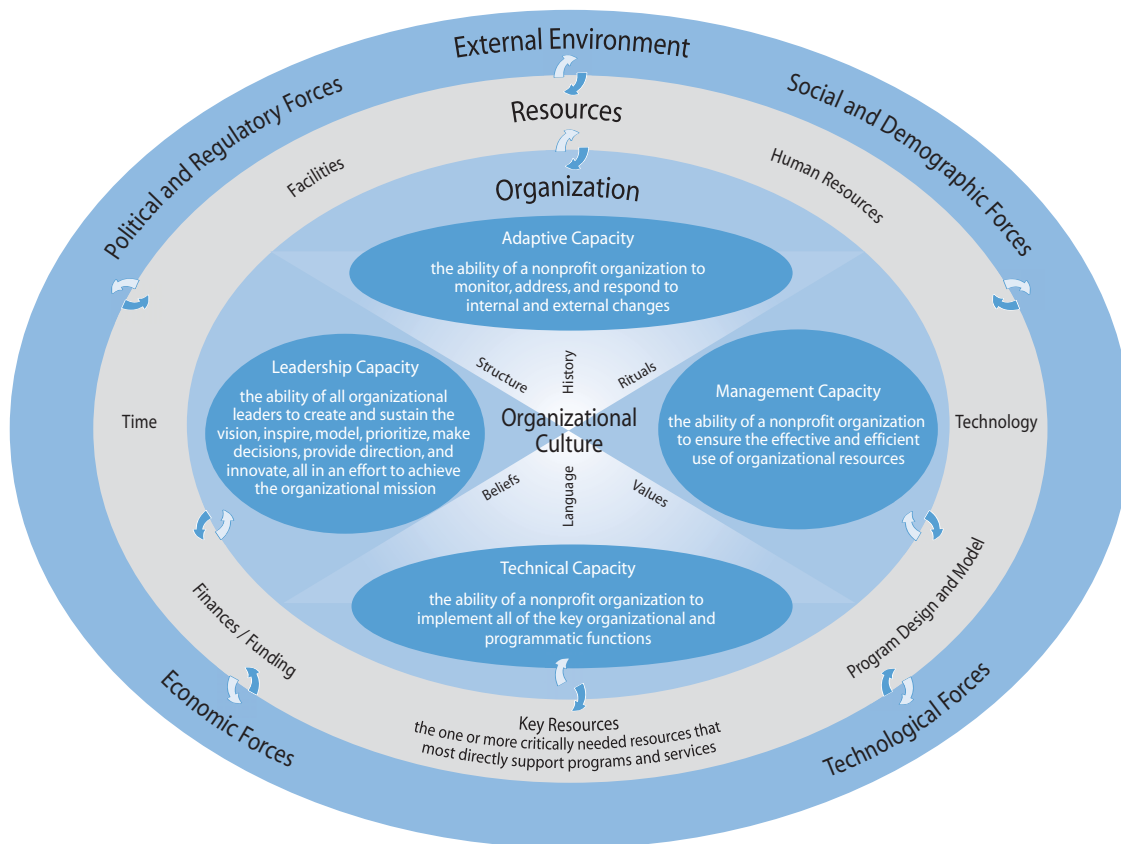
It is sometimes helpful to understand a fairly complicated concept such as change management in the context of a framework that can offer some structure or help make the abstract concrete. Building on its 30-year history of working with nonprofit organizations, TCC Group has developed a model of organizational effectiveness<sup>1</sup>, *the core capacity model*. The model, seen in Figure 1, assumes that for an organization to be effective over time, it needs to be strong in four domains, or capacities:

1. **Leadership:** the ability of executive staff and the board to develop a strong shared vision for the organization and acquire the resources needed to implement that vision;
2. **Adaptive:** an organization's ability to gather data from internal and external sources (evaluations, needs assessments, planning processes, professional networks, etc.) and use that information to continuously strengthen its programs and operations;
3. **Management:** the ability to allocate all of an organization's resources effectively and efficiently;
4. **Technical:** the extent to which the organization has what it needs to do its work well (e.g., equipment, facilities, professional development, etc.).

In addition to the four core capacities, the organizational effectiveness model also takes into account **organizational culture**, which is itself not a capacity but which influences each of the capacities. Organizational culture includes elements such as: the way the organization responds to stress; norms around board and staff decision-making; organizational values; the extent to which successes are recognized; and the organization's openness to critical inquiry, feedback, and discussion.

It is easy to see how all components of the core capacity model would be called upon in a change management process. Assume there has been significant programmatic expansion: the Executive Director needs to make sure that the new programs are well-integrated into the organization (leadership); the new programs will need to be evaluated (adaptive); someone will have to implement and oversee the programs (management); and new staff will need space, computers, and orientation and training (technical). And certainly, organizational culture needs to be considered: What type of impact will the addition of these programs have on staff morale, and how should changes be communicated to minimize any negative impact?

Figure 1: Core Capacity Model



<sup>1</sup>TCC Group defines organizational effectiveness as an organization that is consistently making progress toward achieving its mission, over time.



Although each of the four capacities is critical to an organization's ability to be effective over time, TCC Group believes that Leadership and Adaptive are the most important. Without strong leadership and the ability to understand, predict, and effectively respond to trends in the operating environment, organizations will not be able to manage change over time. In fact, when TCC reflected on those clients that most successfully implemented meaningful change, we realized that they all shared one characteristic: strong leadership. This paper will therefore focus primarily on the relationship between leadership capacity and change management.

## The Organizational Lifecycle Model

While the Core Capacities model applies to all nonprofits, it does not look the same for all organizations. TCC Group recognizes that "effectiveness" means different things to different organizations, depending on myriad factors, including an organization's size, age, and programmatic focus. To complement the Core Capacities Model, we have found it useful to apply the *Organizational Lifecycle Model*, which assumes that organizations, like people, go through stages of life and have different strengths and weaknesses at each stage.

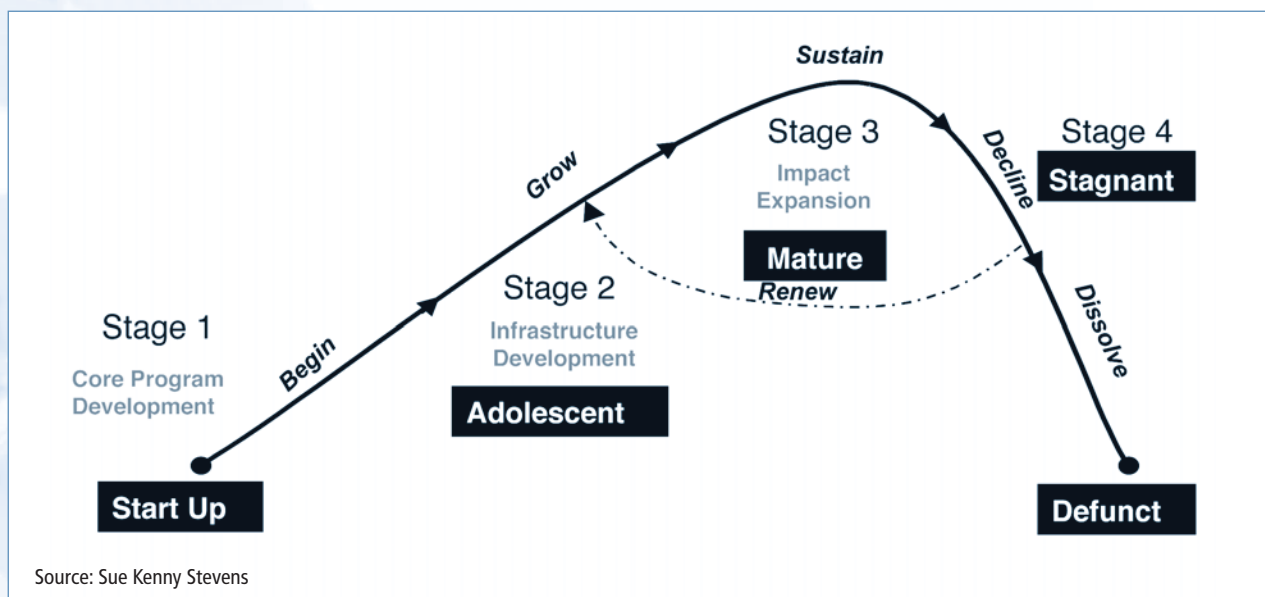
The lifecycle is an **additive model** generally defined as follows:

- **Core Program Development** is the stage at which you make sure that there is alignment between programs and your mission/vision. What is an organization's purpose, and do its programs and services adequately support that purpose?

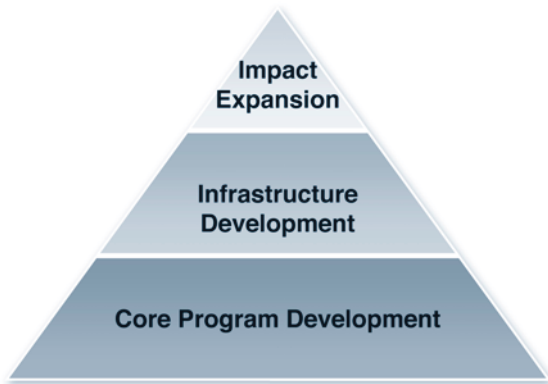
- **Infrastructure Development** occurs when programs and services are fairly well in place, and the organization recognizes that to maximize effectiveness and impact, it must build adequate systems that allow for better, more appropriate management, governance, and/or leadership.
- In the **Impact Expansion** stage, organizations are generally stable and have become adept at extending beyond their organizations to increase impact. Activities typical of this phase include strategic alliances, partnerships, outreach, and policy/advocacy work (for those organizations not primarily focused on policy or advocacy).

There is an additional component of the lifecycle model, **Stagnation/Decline**, which occurs when a nonprofit begins to lose touch with its stakeholders (internal or external): Program quality suffers, and innovation has ceased. An organization might find that demand for its services has plateaued, there is less interest from traditional donors, and employee moral is suffering. At this point, there are generally two options: **Renewal**, during which an organization can engage in self-reflection and take steps to refocus on high-quality, outcome-focused programs/service or **Dissolution**, by either ceasing operations entirely or merging with another organization. It is important to keep in mind that, unlike the *human* lifecycle model, however, the organizational lifecycle model is *not* deterministic. Nonprofit organizations should strive for Impact Expansion, but may not get there. Organizations do not have to reach **Stagnation/Decline**; with self-awareness and a commitment to renewal, a nonprofit headed in that direction can change a downward trajectory and perhaps even reinvent itself.

Figure 2: Nonprofit Organizational Lifecycle Model



**Figure 3: Organizational Lifecycle**

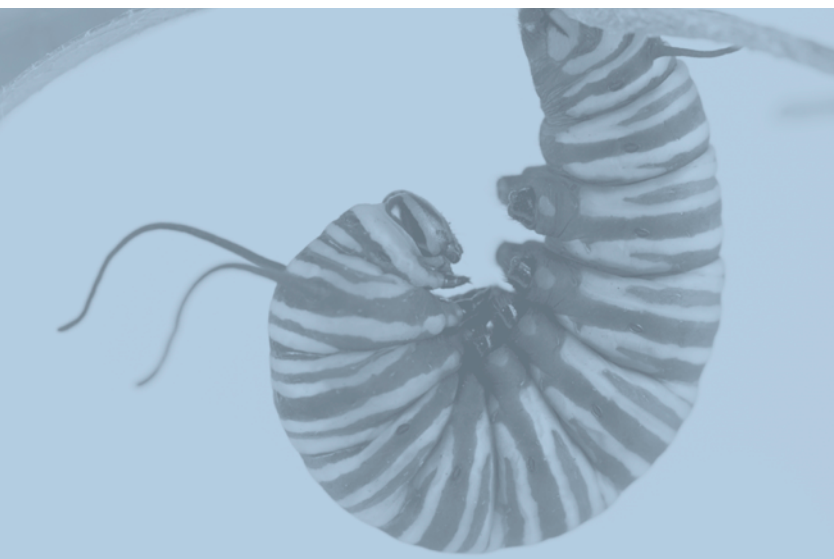


The Organizational Lifecycle Model provides context for understanding a particular nonprofit’s specific capacity building needs. For example, all nonprofits have leadership needs—but those requirements will vary, depending on where the organization is in its lifecycle. At the **Core Program Development** stage, for example, a nonprofit might need to establish a board. For an organization at the **Infrastructure Development** stage leadership might center around helping the Executive Director understand the need to expand his or her vision beyond programs and to think more expansively about a sustainable organization and the resources required to build one. During **Impact Expansion**, the organization might be thinking about leadership sustainability, and how to build a “bench” that will allow the Executive Director to focus more on external duties such as advocacy and coalition building. The point to keep in mind is that leadership needs evolve over time, depending on the changing demands of the organization.

The concepts of change management and lifecycle are therefore closely linked. The concept of change (and therefore change management) is inherent to the lifecycle, because most nonprofits interested in increasing their effectiveness probably seek to reach a more advanced place on the lifecycle model. For example, at a small journalism organization the staff and board had worked to improve program quality, marketing and outreach, external partnerships, and fundraising, but revenues and membership were still declining. The changing needs of constituents were not aligned with the organization’s identity and competencies. The board chair observed that the organization had to choose between following the mission (and possibly closing the doors) or following the market (and possibly failing to achieve the mission). Somewhere along the way, the market and mission had started to diverge, and the organization was coming dangerously close to stagnating.

This organization took a step back and asked, “*Who are we, what are we trying to do, and does this matter to the populations we’re most concerned about?*” By focusing on the purpose, it became better able to embrace the opportunity to re-conceptualize what it is, whom it serves, and how it should structure its programs and services effectively. Ultimately, its leaders created a new, more relevant business model, put its constituents at the center of the work, and remained firmly grounded in the organization’s core purpose.

The Organizational Lifecycle Model provides context for understanding a particular nonprofit’s specific capacity building needs.





## Change Management and Leadership Capacity

### Who are the Leaders in a Change Management Process?

Depending on their size and structure, nonprofit organizations can have many different leadership configurations. Assuming a paid staff, there is at a minimum the CEO (or the equivalent). Other staff leaders might include anyone else involved with developing and implementing an organizational vision—a picture of where the organization is headed. Certainly, the board also has an important leadership role to play in a process of significant change.

The board and staff each has different, but critical, responsibilities related to achieving the organization's mission and implementing a change initiative. On a day-to-day level, the CEO is the lynchpin. It is he or she who is held accountable for the organization's ability to achieve its mission, while at the same time ensuring that the agency is operating smoothly. The board chair is also essential, working in concert with the CEO to set, promote, and oversee the strategic direction for the organization.

### The CEO: Director, Champion, and Coach

There are myriad reasons why a successful change process hinges on strong leadership and a strong CEO in particular. Change is a fact of organizational life, inevitable and essential. Paradoxically, human beings—and thus organizations—seem hard-wired in most cases to resist change, making such processes very difficult and time-consuming to implement. In a sense, change can represent a type of crisis for a nonprofit organization. Individuals must leave their "comfort zone" to make room for something new. In many cases change might mean a shift in organizational priorities—some programs may grow, while others contract or are phased out. This can often mean a threat—real or perceived—to individual staff members' stature or jobs.

To help counter resistance and build support for a change process, the CEO must first have a clear vision of why this particular initiative is so important, how it will benefit the organization, and why

it must start to happen *now*. In many instances, this means making the case for why exactly an organization should leave a place of comfort and complacency and assume some risk and uncertainty. This vision could be many different things—a restructuring, a new programmatic focus, a more efficient type of delivery system, etc. No matter what shape it takes, the important thing is that the CEO be able to describe the vision in a compelling and clear way to stakeholders as well as offer a plan for achieving it. In a very real sense, the CEO must carry the flag for the change initiative, even if he or she is not the person who is involved in the details of its implementation on a day-to-day basis. If he or she does not aggressively champion the change process in word and in deed, no one else will, and the initiative will most likely not succeed.

It is not enough to simply champion a change process, however. An important part of the CEO's job is to understand the role of other leaders in making change occur in ways that are both tangible and symbolic, to "leverage their expertise," in the words of one nonprofit executive. The senior staff and managers who are charged with aspects of implementation, for example, will encounter resistance from their direct reports and will need the support and coaching of the CEO to help overcome barriers. It will also be the job of the CEO to help staff and board cope with the emotional aspects of change—the painful aspects of the process that involve letting go of something in order to make room for something new. While the temptation to say "damn the torpedoes" may be great, the CEO also needs to recognize that not everyone can move "full speed ahead." Some will need more leading, coaching, or prodding than others.

At a large nonprofit focused on health care, the CEO was charged with presenting a new vision to the agency's 200-plus staff. This was an agency with the typical "silos," and morale had been declining for several years due at least in some part to the absence of a clear vision. The new vision, which had been developed in concert with the CEO's executive staff and board, was strong and compelling but nonetheless represented a significant change and thus the risk that some staff would become anxious



and act to sabotage the effort. The CEO became the champion of the vision; she was proactive in introducing it in all her communications with staff and had the senior staff do the same. She attended staff meetings to discuss the vision and take questions, answering all questions related to the rationale for the change and plans for implementation. While the hard work is not yet over, the change effort is off to a good start because the CEO made sure she started with a strong message and then communicated it in a clear, consistent, and positive way.

Also essential is communication. As primary keeper of the vision, the CEO also bears responsibility for making sure that all critical stakeholders understand what is changing and why. It is equally important to be clear on what is *not* changing—what will remain constant during the period of change. Most people working in the nonprofit sector made that choice because they wanted their work (paid or volunteer) to reflect their values and beliefs. A change process can be threatening; confirmation of core values can help galvanize stakeholders in support of the effort. It can also reassure staff and board that the organization's principles are the same—and that by effectively managing change it will be possible to realize those values more fully.

## The CEO and Board Must Work Together

While the CEO might be at the center of a change process, the role of the board chair and other board members should not be underestimated. There are many important ways that the board, under the leadership of the chair, can support a change process. In fact, while theoretically it may be possible for a change process to succeed without the active support of the board, it will be far more difficult and probably take much longer than it needs to.

It is important to keep in mind that the board often does not understand the need for change or agree with the proposed strategy. It may not adequately grasp the circumstances that the organization is facing, or it may be as attached to certain programs, structures, or modes of operation as the most resistant staff person. TCC Group



has worked with many CEOs who have found themselves in this situation and knows that this can be particularly frustrating. Those who have been successful in managing this situation have been able to work strategically with their boards by understanding two basic principles.

First and foremost, the CEO should not go it alone. The CEO should partner with the board chair to co-lead the change process. Once the CEO and board chair are on the same page, they can identify and engage at least one or two other key board members who share the vision for change and are willing to champion the change process among their peers. Such board members provide the CEO with valuable consultation and moral support during rough spots along the way.

Second, it may also be the case that the board—or at least some members—simply needs more information. The CEO and board chair should identify and gather the data needed both to understand the situation driving the change and to make good decisions about the change process. Then they can educate board members about the issues in a compelling, “bottom line” kind of way.

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## Staying Connected over Time.

Many strong nonprofit leaders remain connected in some direct way to the work of their organization. TCC Group has worked with a number of nonprofits where the CEO remains regularly engaged with client work, for example, such as running a support group or assisting with after-school homework help sessions. This allows those CEOs to experience first hand at least some of the pressures their staff faces and the changing needs of customers. It can also give the CEO a window for understanding how change looks from a staff person's perspective or what some of the challenges in implementation might be. This approach is not for everyone, and not every organization can support this type of CEO engagement. It does raise interesting questions, though, about whether keeping the CEO engaged in some aspect of implementation can offer continuity and help the organization weather change.

In the nonprofit world, there are several ways to define the "bottom line." The one most familiar to board members is the financial bottom line—are programs able to cover their costs either through contracts, grants, or earned income? TCC Group once conducted a strategic planning process with a multi-service agency facing a financial crisis. The board acted swiftly, eliminating the program that was hardest to fundraise for and most reliant on unrestricted income. Problem solved? Not really.

The reality of most nonprofits is rarely so black and white. There are at least two other standards that should influence important decisions: a program's effectiveness in achieving its outcomes and the extent to which it supports the agency's mission. In the case of our client, this program's effectiveness was unclear—it had never been evaluated. But it was closely linked to the mission of the organization and the connection that the agency historically had with its surrounding community. Though the decision to cut the program may have been the right one, the process through which that decision was made and communicated to other stakeholders created a rift between the board and the CEO and damaged morale in the agency, jeopardizing other change efforts the CEO was trying to implement.

There are two lessons here. First, the board did not fully appreciate the connection between this particular program and the agency's history and mission. Second, the need for change was clear, but the CEO and board did not have a working relationship sufficiently characterized by mutual trust and respect. The agency eventually recovered

both financially and emotionally, but not before a process that started off as change management turned into crisis management.

## Strong Leaders Know Themselves

The process of implementing a successful change initiative can be profoundly difficult. Leaders that are successful in ushering in such processes are able to garner support and manage resistance, be it from the staff or board or both. They are able to negotiate effective working relationships between their staff and board, and they have the confidence and resources to be successful at managing the change.

But this is only part of the equation. Strong leaders are also highly self-aware and have a good understanding of their own strengths and weaknesses. This self-understanding comes not only from regular self-reflection but also from inviting regular feedback on their performance. One CEO that TCC Group has worked with, someone with a very assertive leadership style, has said that some of the most important information he receives is the anonymous feedback his direct reports provide when they participate in his annual performance review.

Why is self-awareness so important to a leader's ability to manage change successfully? Because sometimes a leader's own biases, fears, or shortcomings can be the biggest impediment to implementing a change process, all good intentions aside. This is often the case with founders or leaders who have such a sense of ownership of the





organization or specific programs that their emotional attachments sometimes impede their ability to see what's in the organization's best interests. A founding board chair, for example, might not be able to make room for a new leader even though the organization's needs have outgrown her skills or style of leadership. Or a founding CEO might be willing to add management staff to meet the needs of a growing program but never hires anyone who will challenge his vision for the organization and its programs. TCC once worked with a human rights organization that had outgrown its largely grassroots structure. The board could see that operations were compromised and morale was dangerously low, but its leaders were not able truly to serve as champions of significant change. At the end of the day, the leadership was too invested in the current structure to be able to consider any kind of meaningful alternatives. While the group continues to operate, it has not been nearly as effective as it should be.

## Change Management is a Two-Way Street

Underlying the discussion thus far is the assumption that nonprofits are structured and managed in a top-down, hierarchical manner. Unlike all-volunteer groups or more cooperative organizational structures, the arguments made here presume that, with respect to day-to-day operations, an individual, not a collective, is ultimately held accountable.

While most of TCC Group's clients do not make decisions and allocate resources by consensus or majority vote, we also do not want to imply that change is strictly top-down. A hierarchical structure is not synonymous with a dictatorship. In organizations where change has been implemented successfully, senior leaders are generally the ones making the big decisions. But those decisions are informed by the realities and concerns of staff and, ideally, staff are involved in monitoring their implementation.

As leaders move up the organizational ladder, it is easy to lose touch with the on-the-ground experience of staff as they interact with clients and live with the realities of cutbacks, data collection requirements, or organizational restructuring. Oftentimes it may be easier to limit the range of input that is solicited. Or once a change process has begun, it can be difficult to change course if the data suggest that things aren't working as planned. This is a dangerous path to go down; leaders that overly restrict their sources of data and feedback run the risk of making decisions based on incomplete information that can lead to resistance or sabotage down the road.



### The CEO: A Leader for All Stages of the Lifecycle?

While some components of leadership might be constant—the need for a compelling vision, for example—other elements are highly contextual. The CEO who can lead an organization through all stages of a lifecycle is the rare individual. Different circumstances call for different types of leadership. The typical founder, for example, is a highly passionate and visionary individual and brings a set of skills needed to bring an idea to fruition. This person may not be the right person to lead the organization through a lifecycle transition into Infrastructure, however. This may not simply be a case of “founder's syndrome,” which implies a lack of objectivity with respect to the organization and its best interests. It may simply be a question of relative ability. The person who is a founder may not be the person who has, for example, the temperament and skills needed to oversee the creation of systems and development of an infrastructure. At this point, the board's involvement may be warranted. The board needs to be able to recognize the CEO's weaknesses and determine likely consequences relative to the CEO's strengths. In other words, the board must regularly assess whether the CEO continues to be a good fit for the organization as it evolves over time. And if significant concerns arise, the board must also come up with a plan for addressing the situation.

## Evaluation: A Way to Drive Change through the Use of Data

Evaluation is often perceived as a hoop to jump through or a threat to a program's ongoing funding. It is certainly true that funders are increasingly using evaluation as a way to hold grantees accountable. While accountability is important, it is not enough. When viewed as a tool for learning, however, evaluation can offer critical information about quality and impact and can be a powerful and positive catalyst for change within an organization.

For leaders who believe that there is always room to improve, change management and evaluation often go hand-in-hand. Bob Rath, for example, wanted OPP to become a learning organization and invested in an outcomes-based management system that all staff members—including Rath himself—are expected to own and use. After one year of implementation, Bob estimated that 90 percent of the staff “owned” the system. In the next year, he focused on engaging staff in understanding how evaluation can lead to higher quality and better results. In time, staff started using data more consistently to engage in new conversations about their programs and to be more strategic in resource allocation.

Even under the best of circumstances, funds are scarce and nonprofits and donors alike should feel confident that they are allocating resources as efficiently and effectively as possible. When approached from a perspective of learning, evaluation can be a very helpful tool for making better decisions.

*For more information on Rath please see page 11.*

TCC Group once worked with an organization whose CEO had a beautiful vision for reinventing the organization, which had stagnated somewhat prior to his arrival. His vision was compelling, relevant, well thought out, and ambitious, and the CEO was a master in articulating it to a wide variety of audiences. From an external perspective, this individual was a very effective leader. Internally, reviews were a little less positive. While the CEO commanded the respect of staff, he never built their trust or truly engaged them in the change process because he was not an “organization guy.” His skills and interests lay in building the programs he was most passionate about, not in building the capacity of the organization or the buy-in from long-time staffers and some board members who were invested in the old ways. Had this CEO recognized this shortcoming and addressed it by engaging his staff in a more meaningful and interactive way, he probably would have encountered less resistance, because people would have felt as if they were part of the process, not victims.

While we strongly advocate incorporating some level of democracy into the change process, we also know that ultimately the bus has to leave the station whether or not everyone has gotten on it. For myriad reasons, there will be people who will not or cannot accept a new approach to doing business. So, while self-awareness and a participatory mindset are important, strong leaders also need to have the ability to accept criticism or manage employee anger or resistance without internalizing it too much. As we have noted, change processes are difficult and put considerable stress on stakeholders. The individual leading that process often becomes the lightning rod absorbing the anxiety and anger that others in the organization are experiencing. This can quickly become a lonely and discouraging role to play, regardless of how “thick” one's skin may be. Fortunately, there are tried and true strategies that leaders can use to help take care of themselves appropriately. If at all possible, the CEO should have some systems of support that not only provide advice and counsel but that also provide moral support and, if necessary, conflict resolution. This could be the executive team, a board-level task force, or a coach who can be a confidential and objective sounding board.

## A Final Word

The subject of change and how to manage it is enormous—far more than can be captured in 3,500 words or fewer! Our goal for this paper was to introduce one essential component of the change process, leadership, and to help identify some ideas, strategies, and examples that will help nonprofit executives and their boards be as successful as possible in managing the change process.

Remember: if you lead a nonprofit, change is part of your job description. We wish you the best on this challenging journey!



## Let a Plan be Your Guide

TCC Group has found that strategic planning—the process of assessing internal capacity and external trends and using that information as a road map for the future—can be an excellent tool for guiding a change process. At its most basic, strategic planning is about deciding where you want your organization to be several years out and how you will allocate resources (human and financial) to get there. By definition, strategic planning is about change—presumably the vision that is at the core of your plan describes a future that looks different from where you are today (e.g., growth, expansion, new competencies, sustainability, etc.). With that vision as your “destination,” the plan behind it is really a road map for getting there—what types of programs and services will you deliver, what staff will you need, what will be the sources of revenue, etc. Whether the change is relatively minor or significant, having a solid plan in place can be a very helpful management tool.

Sometimes change happens on its own; sometimes an organization needs a catalyst to spur innovation or growth. Bob Rath is the CEO of Our Piece of the Pie © (OPP), formerly Southend Community Services (SCS), a nonprofit in Hartford, CT, committed to youth development and economic empowerment. Several years ago, TCC Group worked with Bob to facilitate an organizational assessment process. As a result of the assessment, SCS embarked on its first strategic plan, developed its external communications function, and invested in its IT and data collection systems. As valuable as all those enhancements were to SCS, the organizational assessment’s greatest benefits may have been the questions it spurred for Bob Rath, rather than those that it answered: “The assessment started prodding me to think about, where are we going to go; what are we going to be good at.” In other words, the assessment process was the first step in a longer change process during which OPP, led by Bob, made some deliberate, and sometimes difficult, decisions that would force staff and board members to think carefully about what effectiveness meant for this organization and how this goal would be achieved.

In other cases a plan might not necessarily be the catalyst for change, but it can be a critical tool in helping ensure that change occurs successfully. Stephanie Palmer, Executive Director of the New York City Mission Society, has led her organization through two strategic planning processes in the past 10 years and has found that the plan has been an essential component of a larger change effort. “Planning was an anchor during our change process,” says Stephanie. “It offered something everyone could hold onto, which was particularly important when we hit rough patches. It provided stakeholders in our organization with a consistent sense of what we had agreed to and what we still needed to do in order to move forward.”



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**About TCC Group**

For nearly 30 years TCC has provided strategic planning, program strategy development, evaluation, and management consulting services to foundations, nonprofit organizations, corporate community involvement programs, and government agencies. During this time, the firm has developed substantive knowledge and expertise in fields as diverse as community and economic development, human services, children and family issues, education, health care, the environment, and the arts. From offices in New York, Philadelphia, Chicago, and San Francisco, the firm works with clients nationally and, increasingly, globally.

**Our Services for Nonprofit Organizations**

- **Strategic & business planning**—We help nonprofits plan to address short-term needs and achieve long-term goals by developing a vision of where they want to be in the future, identifying the best route for getting there, and helping them overcome the obstacles that stand in their way. Services include needs assessment, strategic planning, business planning, and program planning and/or redesign.
- **Program evaluation**—Our evaluation services are geared to improve and enhance ongoing program development and provide information that informs decision-making on the continuation or evolution of programs. Services include external evaluation, organization-wide internal evaluation, and professional development and technical assistance.
- **Governance assessment & restructuring**—TCC works with nonprofit executive staff and board members to increase the organization's capacity to provide effective leadership. Services include board assessments and evaluations and board-staff relations.
- **Capacity-building**—We focus on strengthening the core capacities necessary for an organization to function efficiently and effectively. Services include organizational assessments and core capacity strengthening.

**How We Work**

Our approach is governed by the need to establish a clear and engaging consulting process that offers structure and predictability as well as flexibility to meet unforeseen needs. Working in multidisciplinary teams, TCC Group tailors each new assignment to meet the individual needs and circumstances of the nonprofit client. We develop a scope of work that responds to the particular challenges, timetable, and budget for the assignment.

Assignments typically begin with a data collection phase that engages relevant groups of stakeholders. TCC Group consultants listen carefully to ensure that differing perspectives are represented. In addition, we rely on extensive client participation during the assignment to ensure all strategies and recommendations are realistic and that the client has ownership of the process. We employ a variety of tools such as the Logic Model and the Core Capacity Assessment to help ground our work in the realities of the organization's environment and focus our attention on the critical issues of how the organization can have the most impact on its mission.

**Our Distinctive Qualifications**

The particular expertise of TCC Group lies not only in understanding nonprofit organizations but also in our intimate knowledge of private foundations and corporate grantmaking. Our work can extend to evaluating the impact of programs, brokering new partnerships within the nonprofit sector as well as with corporations and public agencies, suggesting new approaches to foundations, formulating innovative program strategies, and thinking outside existing structures and systems.

**Our Clients**

Our clients come from all parts of the nonprofit community, ranging from small social service nonprofits to national membership organizations to large international NGOs. They include new organizations that want an appropriately ambitious plan to get started, emerging organizations needing assistance in designing systems and structures as they prepare for growth, as well as established institutions re-shaping their strategies to address new demands and assess the outcomes of their services.

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