

## Creating Results that Generate Social Impact

Results show change and impact -- they are the marker of accomplished organizations and programs and the means by which we evaluate success.

Nonprofits need results to illustrate that their resources aren't being wasted or utilized frivolously. Philanthropies require results to demonstrate to boards and other stakeholders that they are fulfilling their mission. Corporate citizenship programs want results that achieve the double bottom line of both business and social goals.

For more than 26 years, TCC's consultants have been at the forefront of help-

ing nonprofits, foundations and corporate citizenship programs get results and achieve social impact. TCC consultants understand the importance of results to stakeholders, shareholders and clients and, in every consulting assignment, strive to ensure that they help clients create lasting impact.

We feel that the best way to illustrate our focus on success is by providing easy access to both the results of our consulting engagements and our track record of achieving social impact.

In these case studies on our work with Habitat for Humanity, Wachovia Corp., the Altman Foundation and the Philadelphia Zoo, we show how TCC has helped clients create results through planning, evaluation, and grants management.

### CHALLENGE: Defining the path forward for a leader in affordable housing

It wasn't surprising when Habitat for Humanity International recognized Habitat-New York City as one of its leading urban affiliates. In just five years, Habitat-NYC had completed nearly 100 homes and was moving fast to build more.

However, as the organization's leaders looked to the future, they wanted to ensure Habitat-NYC's continued success. "We realized that we needed a strong, realistic strategic plan to

serve as our path forward," said Executive Director Roland Lewis. "That was a real challenge for a group of very busy people, especially on the accelerated six-month schedule we needed to meet."

Lewis knew that hiring objective consultants was necessary for their tight schedule, so Habitat-NYC engaged TCC Group to facilitate its strategic planning process.

### SOLUTION: Situational Analysis + Future Vision Delivers Strong Strategic Plan

Working within a short timeframe, TCC consultants analyzed and interpreted Habitat's organizational assessment findings. In doing so, they expanded upon, instead of duplicating, existing work, filling in gaps with additional interviews and surveys. In short order, Habitat possessed a succinct situational analysis that summed up internal capacity and external environmental issues.

"Based on their expertise, TCC consultants were able to clearly outline stakeholder perceptions of our strengths and weaknesses in a

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### Coming Soon: TCC's Online Core Capacity Assessment Tool for Nonprofits

TCC will soon debut its Core Capacity Assessment Tool (CCAT) for nonprofit organizations. The tool measures adaptive, leadership, management, and technical capacity and can be used by Board and staff members. The tool has already been used by hundreds of nonprofits.

For more information, visit [www.tccgrp.com](http://www.tccgrp.com) or contact Alexandra Ravenelle at 212-949-0990, ext 202.

## Results (continued from page 1) »

way we never could have done ourselves," said Lewis. "As a result, our board was able to clarify our future vision."

Based on this new vision, TCC Group and Habitat convened a large retreat of over 100 internal and external participants, ranging from staff members to Habitat-NYC borough leaders. The group tested the feasibility of the vision and related goals so that Habitat would be certain that its new strategic plan was firmly rooted in very specific outcomes. TCC consultants then helped refine the plan through several working group meetings of board and staff members that focused on specific issue areas--from advocacy and outreach to governance and board development.

"The TCC team was a good fit with everyone in this diverse group," Lewis said. "They had a unique capability of hearing everyone's opinion, which was vital."

### RESULTS: Sharper Focus, Increased Buy-In

Habitat-NYC approved and launched its new strategic plan in a record six months. TCC Group's work bringing the strategic plan to life has generated significant results -- increased revenue for Habitat-NYC (through a corporate giving program and an annual gala) and an increased focus on advocacy. Habitat-NYC has succeeded in engaging over 100 faith-based institutions in their advocacy efforts.

Lewis reports that the strategic plan also serves as a vital framework for staff and board decision-making. In a recent board meeting, when a board member questioned Habitat-NYC's emphasis on advocacy work, another board member was able to immediately point to where the advocacy focus was reinforced in the plan. "The plan is owned and used by staff and board alike, because of TCC Group's role in the process. Stakeholders bought in and remain engaged. We just could not have done that without TCC," said Lewis.

### CHALLENGE: Reinventing a Corporate Community Involvement Program to Reflect a Merger, New Vision and Core Values

When the Wachovia Corporation and First Union merged in 2001, forming the fourth largest bank-holding company in

the U.S., Wachovia's highly respected corporate contributions program had to be refocused to reflect the company's new vision, core values and rebranding efforts. The merger presented a unique opportunity to create a world-class program and to measure its impact, particularly in the area of education.

TCC Group undertook a strategic assessment of the Foundation, with three goals: devise a strategy that would set the newly merged company apart from its competition, enhance its competitive advantage both locally and nationally as it reaches out to new customers, and introduce a process that ensures strategic grantmaking.

### SOLUTION: A New Strategy for Optimizing Performance

TCC's analysis involved a document review, internal interviews with key stakeholders, a benchmarking study, research on key issues in education and meetings with a Wachovia steering committee. The information enabled TCC consultants to gauge how best to align the Foundation with the new corporate vision, brand and culture, while maximizing impact in Wachovia communities and capitalizing on corporate

resources to benefit the company and its communities, employees and shareholders.

TCC Group recommended a strategy driven business model for the Foundation with a three category grant portfolio: employee-driven grants, including volunteer programs and time away for community service; market-driven grants, including those that meet community needs; and outcome-driven grants, based on narrowly defined goals and focus areas. Outcome grants would focus on improving student achievement by targeting the biggest factor that contributes to it: teachers and teaching.

### RESULTS: Stronger Guidelines, Greater Impact

TCC Group also recommended that the Foundation increase regional autonomy by allocating contributions directly to regions, conducting formal grant evaluations to capture community impact and return on investment, and improving communications through the Foundation's website.

### Additional TCC Case Studies

Bristol-Myers Squibb  
Foundation

New York Public Interest Group  
Community Mapping  
Assistance Project

John S. and James L.  
Knight Foundation

Brandywine Health and  
Wellness Foundation

Kraft Foods

Liberty Science Center

Safe Horizon

Available online at [www.tccgrp.com](http://www.tccgrp.com)

## Results (continued from page 2) »

The changes reshaped the Foundation's contributions program, providing clear and unambiguous strategic direction and even increasing employee buy-in and volunteerism. "TCC helped Wachovia create an effective strategic plan that aligned our corporate community involvement program with our newly merged company," said Frank Addison, Wachovia's Director of Corporate Philanthropy. "They understood how to respond to the various interests from stakeholders in our markets and within our company, while helping us leverage our resources fully. Their experience, knowledge of the field, ability to work at all levels of Wachovia, and flexible, results-oriented approach added clear value."

### CHALLENGE: Charting a Strategy for the Future

After 90 years of grantmaking, the New York City-based Altman Foundation sought a first-time strategic plan in order to ensure future funding impact.

The Foundation embarked on a facilitated self-assessment with an emphasis on hiring objective strategic planners. After extensive vetting, Altman turned to TCC Group. "We sought a firm experienced in the foundation world that could provide us with comparative models. TCC Group consultants had significant experience in our funding areas and in strategic planning," recalled Altman President Jane O'Connell.

### SOLUTION: In-Depth Analysis Generates Practical Recommendations

TCC Group found the Altman Foundation, with its clear geographic focus and close relationships with stakeholders, well positioned for strategic planning. Through an in-depth data collection process featuring interviews with staff and board members; and an external scan incorporating focus groups, grantee surveys, individual interviews and group discussions; TCC Group developed a razor-sharp understanding of the Foundation's diverse stakeholders. In doing so, "TCC consultants developed a great collaborative relationship with Altman staff and board members," O'Connell said.

This intensive process generated several insightful recommendations, most of which have been implemented by the Foundation, including clear guidelines for each funding area, with specific objectives and detailed strategies. Other changes include the implementation of a formal evaluation process and refocusing two of the Foundation's regular



board meetings to discuss substantive issues affecting its grantmaking.

### Results: Clear Framework for Grantmaking Now and in the Future

The Altman Foundation's "new system of objectives and strategies allows us to show more clearly how the Foundation's priorities translate into programs and approaches on the ground," commented Vice President and Executive Director Karen L. Rosa.

"In addition," said O'Connell, "our staff and board members were motivated to become even more proactive in our grantmaking than we had been traditionally. We've become even more visible in the philanthropic community in leadership roles and collaborations."

O'Connell emphasizes that staff and board members are clearer on the 'what and why' of grantmaking. This shared understanding has facilitated the streamlining of internal communications and decision making. Grant applicants are also clearer on Altman's funding guidelines, thanks to the Foundation's website. "We are set, with our new guidelines, for ongoing evolution as our areas of funding and the environment in which we work change over time," says O'Connell.

Results (continued from page 3) »

## CHALLENGE: Measuring a zoo's ability to influence visitor attitudes, behavior

While the Philadelphia Zoo ranks among the city's most popular tourist attractions and family outing venues, there is more to its agenda than entertainment and fun. The Zoo's mission--"to advance discovery, understanding and stewardship of the natural world"--is evident in its exhibits and programs. Yet, until recently, the Zoo had never formally gauged its success in shaping public attitudes and influencing conservation behavior.

### SOLUTION: Building a logic model

With a grant from the Philadelphia Cultural Management Initiative, a program funded by The Pew Charitable Trusts, the Zoo engaged TCC Group in 2004 to perform an evaluation study that would help assess the extent to which the Zoo was accomplishing its mission. As a first step, TCC created a "logic model"--a road map that outlined strategies, desired outcomes, and provided the basis for surveys and other measurement tools for evaluating the experiences of casual visitors, members and volunteers.

"Basically, we were looking to answer two questions," said Kathleen Wagner, Senior Vice President for Conservation and Education at the Zoo. "First, how effective are we in influencing visitors' conservation behavior? And, second, how do our programs, exhibits, and outreach efforts encourage people to care more about the environment and take action on its behalf?"

### RESULTS: Connecting with animals

The Zoo subsequently completed its first round of surveys, which generated a large body of data about how people experience the Zoo. "We learned that visitors placed great value on their interaction with staff, so we've increased our investment in staff training," Wagner said. A desire to connect more closely with animals, voiced by many visitors, will

be addressed in the planning for the future renovation of the Zoo's bird house.

Other exhibits--notably the Zoo's new "Bank of America Big Cat Falls" area--have been designed to promote a commitment to conservation and environmental protection by allowing visitors to experience the animals in naturalistic settings, coming nearly face-to-face with the big cats. In addition, the Zoo has applied for grants for the nationwide

dissemination and replication of the "Measuring Mission" study developed by TCC.

"We've always believed passionately that the essential function of zoos is to preserve wild animals and wild places, primarily through public education," said Wagner. "The TCC consultants who worked with us understood this viewpoint intuitively. Their work has enabled us to achieve tangible gains in the Zoo's impact and relevance."

\* \* \* \* \*

Strong listening and analytical skills, strategic brainstorming abilities, flexibility in working with strict deadlines and diverse personalities, objective experience--these are qualities that TCC consultants bring to every organization where they help envision the future, plan programs, conduct evaluations or manage grants. TCC consultants

are dedicated to promoting the mission of nonprofits, philanthropies and corporate citizenship programs and in obtaining results that promote social impact. To learn more about how TCC Group consultants can help your organization achieve results, contact us toll-free at 1-888-222-2283 or via e-mail at [info@tccgrp.com](mailto:info@tccgrp.com).

*For more information on TCC's focus on results, we urge you to visit our website at [www.tccgrp.com](http://www.tccgrp.com). Additional results-oriented case studies can be found under the option, "Our Results."*





# Current and Recent Work

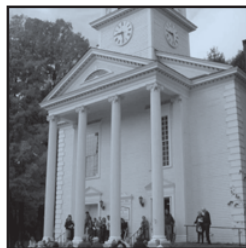
**Goldman Sachs** recently hired TCC to oversee the next phase of its "Capacity Initiative," a multi-year program to provide multiple levels of capacity building assistance to the hundreds of nonprofits in New York and Chicago that use Goldman Sachs volunteers through the Goldman Community TeamWorks program. Building on TCC's previous work in the development of the Initiative, TCC is now developing the "Capacity Academy," providing organizational assessments, workshops and seminars on capacity building to over 300 nonprofits and targeted capacity building assistance for two years to six "Capacity Partners" selected earlier in 2006.



TCC's Chicago office is currently working on two nonprofit technology-related evaluations. For **NPower**, the firm is providing an evaluation of the Nonprofit Technology Assistance Provider (NTAP). Meanwhile, as part of the **Kellogg Foundation's Communities of Color Initiative**, TCC will be evaluating the CompuMentor project, TechSoup, to determine what culturally relevant technology assistance means to communities of color.

The Board of the **Mary J. Hutchins Foundation**

recently awarded \$625,000 in grants, primarily to social service organizations in New York City. The Foundation is one of several small family foundations that utilize TCC Group for its grants management and administration.



TCC is working with **The California Endowment** to evaluate general operating support grants that the

Foundation awards to advocacy organizations supporting health improvements.

TCC consultants are currently engaged in a strategic planning assignment for the **Community Foundation for Greater Buffalo**. The project includes developing a five year strategic plan, grounded in a community-impact framework, that will address grantmaking priorities, donor engagement, evaluation and communications.

**Brooklyn Bridge Park Development Corp** recently engaged TCC to provide governance and management planning for the creation of the Brooklyn Bridge Park. Once finished, the Park is expected to become a world-class, 85-acre waterfront park located along the East River.

TCC recently completed an evaluation of the New Dollars/ New Partners program for **Partners for Sacred Places**. The Philadelphia-based organization provides a comprehensive training program to help congregational leaders broaden and diversify their sources of support for maintaining and caring for their buildings.

TCC has finished a collaborative planning process with the **Jewish Life Network's** National Jewish Retreat Center Planning Committee. TCC's work involved facilitating consensus among the philanthropic partners comprising the Committee, conducting sensitive, fact-finding conversations with groups of stake-

holders, and objectively analyzing and reporting on data.

After nine years and more than \$14.7 million in grant distributions, in 2005, Altria closed its **Altria Employee Fund** (AEF) in consideration of significant corporate changes. TCC was engaged to provide a summative evaluation in an effort to capture outcomes from Altria's nine years of Fund involvement and articulate best practices.

TCC is working with **The Rapides Foundation**, a health conversion foundation serving central



Louisiana, to evaluate the impact of its nonprofit capacity building program. The evaluation will include both an analysis of the outcomes of the program as well as strategic guidance

on how to structure the program in the future.

TCC consultants are currently working with **Hostelling International - USA (HI-USA)** to develop an evaluative framework and data collection tools for the organization's Travel Scholars Program. HI-USA offers affordable accommodations and travel programs world-wide through more than 4,000 hostels in 60 countries serving one million overnight guests each year.

TCC Group consultants recently completed a benchmarking and assessment analysis for **Seagate Technology** in California. Seagate, a leading independent manufacturer of hard drives, is using the analysis to begin the process of possibly redesigning its community involvement programs and structure.

## Staff Updates



The firm is pleased to announce that **Shao-Chee Sim** has joined the staff as a Senior Evaluation Consultant. Shao-Chee was previously employed as a Research and

Evaluation Officer for the Wallace Foundation. He has a Ph.D. in Public Policy from the Lyndon Baines Johnson School of Public Affairs at the University of Texas and an MPA from the JFK School of Government at Harvard University.

The firm welcomes **Herma Hackshaw** as Administrative Manager.

Herma comes to the firm after working for Union Baptist Church in Stamford, Conn. as an Operations/Office Manager. Herma will also be assuming many of Carol Gallo's previous Director of Administration duties as Carol is promoted to a Senior Consultant.



The firm also hired **Alexandrea Ravenelle** as Marketing Manager. Alexandrea joins the firm after serving as the Director of The Elie Wiesel Foundation for Humanity.

The firm recently hired **Kristen Ellis** as a new Research Associate. Kristen is a recent graduate of New York University with Bachelor of Arts degrees in Politics and Economics, with honors and distinction in Politics.



The firm welcomes **Isaac Scott** as an administrative assistant in the Philadelphia office. Isaac is a recent graduate of Villanova University with a Bachelor of Arts in History/International Relations.

Research Associate **Denise Finley** was admitted to the Executive Program at the University of Pennsylvania's Fels Institute of Government.

The firm says farewell to Research Associate **Karen Courtheoux** who has accepted an offer to attend the University of Chicago's School of Law and Marketing Manager **Cara Cipollone** who accepted a position as the Senior Project Manager at Hudson Medical Communications. We wish them the best.

### Coming Soon:

#### Presentations:

Paul Connolly will present several sessions at the **Association of Small Foundations** annual conference from October 26-28 in New Orleans. For additional information, visit [www.smallfoundations.org](http://www.smallfoundations.org).

#### Workshops:

TCC's corporate team is currently planning two workshops for Corporate Community Involvement professionals. One workshop will be on the topic of employee involvement and volunteerism and the other will be on corporate philanthropic initiatives in capacity building. Both workshops are currently slated for fall 2006. To learn more, please contact Alexandrea Ravenelle by email at [aravenelle@tccgrp.com](mailto:aravenelle@tccgrp.com) or call 212-949-0990, ext 202.

#### Briefing papers:

TCC is preparing to publish **"Creating a Community of Learners: Successful Evaluative Learning for Nonprofits and Funders."** This publication will be available on our website [www.tccgrp.com](http://www.tccgrp.com) or you may request a hard copy by emailing [info@tccgrp.com](mailto:info@tccgrp.com).

#### BOARD OF DIRECTORS

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**Thomas H. Fox**

**M. Patricia Hoven**

**Shelby Miller**

**Ricardo Millett**

**Julia Maye Malloy**

**John Riggan**

**Jennifer Li Shen**

**Tom Stephens**

## Recent Presentations

On March 8 at the **Grantmakers for Effective Organizations** conference,



Paul Connolly served as a facilitator at an orientation pre-session on philanthropic effectiveness. Paul Shoemaker of Social Venture Partners and

Janine Lee of The Arthur M. Blank Family Foundation were panelists for the session.

Shao-Chee Sim participated as a panelist at the inaugural symposium of the Out-of-School Time Special Interest Group (OST SIG) of the **American Educational Research Association** at its annual meeting in San Francisco this past April. The symposium was entitled "Out-of-School Time Research: Looking Back, Looking Forward" and was organized by the Robert Bowne Foundation.

At a pre-Conference Institute in May at the **Axelson Center for Nonprofit Management's**

Annual Symposium, Steve Bumbaugh and Paul Connolly presented a day-long session on "Change Making 101: How to Build and Sustain



Your Nonprofit's Adaptive and Leadership Capacities." Also at the Axelson Conference, Chantell Johnson, Jen Avers and Shao-Chee Sim led a session entitled "Using Evaluation to Support Innovation."

On May 8 at the **Council on Foundation's** annual conference in Pittsburgh, TCC's Peter York co-presented "Creating Win-Win Evaluations by Engaging Internal Resources and Sharing Insights" with Dee Merrill of the Wachovia Foundation, Erica Weinberg of the Pfizer Foundation and

Rene Deida of the Prudential Foundation.

On May 23, Jennifer Avers and Chantell Johnson led a presentation for 40 nonprofits and consultants in



the Chicago area along with with Pranav Kothari of Mission Measurement and Christine Plautz of Girl's Best Friend Foundation. The ses-

sion, "Evaluation Tools You Can Use: Designing and Conducting Evaluation," was hosted by the **Association of Consultants to Nonprofits**.

On May 31, Paul Connolly facilitated a member's briefing on "Designing and Managing Long-term Capacity Building Initiatives" at the **New York Regional Association of Grantmakers**. Jon Funabiki of the Ford Foundation and Erica Weinberg of the Pfizer Foundation also presented.

Paul Connolly led workshops on "Navigating the Nonprofit Organizational Lifecycle" at the **Northern California Philanthropy Consultants Network** on June 5 and at the **Silicon Valley Philanthropy Incubator** on June 7.

On June 8, Richard Mittenthal gave the keynote address at the **United Way of New York City and Baruch College School of Public Affairs**, Nonprofit Group conference, "Using Management Consultants for



Nonprofit Organizations: Promises and Pitfalls."

At the **Delaware Valley Grantmakers** conference in June, Tom Knowlton

served on a panel organized by Wachovia on evaluation entitled "Serving Two Masters: How Program Evaluation Can Enhance Both the 'Corporate' and 'Community' Aspects of Your Program."

On June 12 at the **Northern California Grantmakers Corporate Philanthropy Institute** Tom Knowlton gave the keynote address on "Building and Sustaining Effective Corporate-Community Partnerships." Sally Munemitsu and Janice Brown also facilitated breakout sessions using a framework developed by TCC to guide the development of three existing partnerships in Northern California.

DeShele Dorsey conducted a workshop on organizational effectiveness for **Staten Island Not-for-Profit Association** on June 20th. The workshop reviewed capacity building activities that support organizational development.



On July 29 at **The Conference Board's** Corporate Community Involvement Conference, Janice Brown facilitated a session on Disaster Relief: Building an Effective Plan. Marilyn Duffy Vice President of Goldman Sach's Charitable Services Group co-presented the session.

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strategies to achieve social impact



# perspectives

a newsletter for the clients and friends of TCC Group

Fall 2006

## WHO WE ARE:

TCC Group is a consulting firm that develops strategies and programs that enhance the efficiency and effectiveness of nonprofit organizations, philanthropies, and corporate citizenship programs to achieve social impact.

## WHO WE SERVE:

- Philanthropic organizations
- Nonprofits
- Corporate citizenship programs
- Government

## WHAT WE DO:

- Planning
- Evaluation
- Grantmaking assistance
- Program and strategy development
- Needs assessment and competitive analysis
- Organizational development

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