

LETTER FROM THE CEO

As TCC Group has grown over the years (until recently as The Conservation Company), the consulting field has grown as well. Large, for-profit firms, which previously offered their services *pro bono*, are now competing for fee-based contracts. Numerous retired, private sector executives -- many with considerable experience -- have joined the field, looking to "give back." Affinity groups and support organizations such as Grantmakers for Effective Organizations, the Alliance for Nonprofit Management, and the newly formed National Network of Consultants to Grantmakers, have also appeared, many of which have websites, newsletters, and annual meetings.

There are several reasons for this expansion. The first is simple -- growth in the number of potential clients. There has been an enormous increase over the past few decades in the number and size of nonprofit organizations and grantmaking foundations. One recent study found that between 1993 and 2003, the number of nonprofits grew by 68%, and both assets and expenditures almost doubled.

In terms of grantmaking foundations, the expansion is equally impressive. In that same period, the number of grantmaking foundations doubled, their combined assets grew over 150%, and their giving tripled. Meanwhile, more companies are striving to be good corporate citizens and increase their social impact.

[continued on page 3 »](#)

CCAT Helps Organizations Realize Capacity

When Skip Pahl, Executive Director of the Oceanside Museum of Art in Oceanside, California, received the opportunity for coaching and access to the TCC Core Capacity Assessment Tool (CCAT) last year from The James Irvine Foundation, he jumped at the chance to better understand his nonprofit organization.

"Everyone in our organization who took part said it was very interesting and caused them to look at the museum in a way they hadn't thought of before," he said of the CCAT. "We met with our coach, who explained the tool and it gave us a terrific framework in which to reexamine the museum. We knew we had shortfalls in operations, but it really clarified some problems that we had felt before, but had never actually put our finger on."



The museum's organizational assessment informed the development of a capacity-building plan and, soon after, the Irvine Foundation awarded a \$350,000 grant so that the museum could implement the plan.

The result of a multi-year development process by TCC Group, the CCAT is an online questionnaire that assesses a nonprofit based on four organizational capacities: adaptive, leadership, management and technical. It also assesses organizational culture.

The 146-question tool generates a list of strengths, challenges and recommendations for the organization, based on replies from staff and board. It will also provide a capacity-building plan that prioritizes a set of next steps

an organization can implement on its own and/or with outside help to make the greatest improvement.

Although the tool has been used for the past 18 months by hundreds of nonprofit groups, the CCAT will be officially launched to the public on the TCC website in late spring 2007.

"We have found that this tool has been an invaluable resource for numerous nonprofits and funders," said Peter York, TCC's Director of Evaluation, who led the creation of the CCAT. "It allows nonprofits to truly quantify their organizational capacities in the four core areas and to have a better understanding of areas that need improvement."

The tool is based on years of fieldwork and multiple publications by TCC consultants, including a seminal national study of the capacity-building field, funded by the David and Lucile Packard Foundation.

For the Oceanside Museum, which was about to enter a major expansion of its facility and programs, the CCAT helped the organization rethink its strategy for growth.

"We went into the process of expansion by determining the cost of the new facility and the staff needed to begin the new programs. We thought we needed help with staffing levels," Pahl said. "But as we started to get into the ratings and where we had our different capacities and where we had shortfalls, we

[continued on page 2 »](#)

CCAT (continued from page 1) »

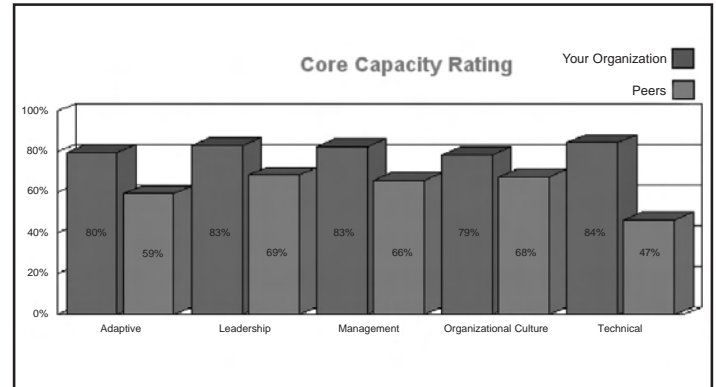
began to refocus, and our first priority was to begin a long-term plan, enlarge our audience to build a broader audience with more diversity, and begin working on more long-range stability."

Unlike other assessment tools, the CCAT is entirely online. It is administered to organizational leaders such as the Executive Director, Program Director and board members. These individuals fill out the instrument independently and anonymously in order to provide the most accurate assessment of many key organizational functions. Findings reflect an aggregation of what leaders perceive to be the organization's strength and weakness areas within each of the four core capacities, as well as organizational culture.

Once all of the registered users have completed the tool, a final report on the organization's core capacities, complete with graphic depictions and recommendations for change, is generated and forwarded to the organization.

Madeline Janis, Executive Director of the social justice organization, Los Angeles Alliance for a New Economy (LAANE), asked that select members of her staff and board take the CCAT in 2006. Now in 2007, the entire staff and as many board members as possible are taking the survey as part of a larger conversation about management training. "We thought it would be an even better investment if everyone participates and you have everyone thinking about the same questions at the same time," Janis said.

In New York at the Gay Men's Health Crisis (GMHC), a large AIDS service organization, the CCAT's role in management



Sample CCAT report with overview of the four core capacities and information on organizational culture. Although each capacity is also addressed in more detail in the complete report, this chart provides nonprofits with a clear overview of their capacities and a comparison to peer organizations.

was equally vital, but somewhat different. The nonprofit recently changed its management structure and for newly-appointed COO Robert Bank, the CCAT results were crucial in helping to shape departmental changes.

"It's important for people like us to step back and think because we're always so busy doing," he said. "The CCAT gives you the opportunity to listen to what's going on around you, to analyze the data, and to make strategic short and long-term decisions based on that data. You have a responsibility as a nonprofit manager to do this."

For more information about the CCAT, contact Alexandria Ravenelle at (212) 949-0990, ext 202 or email info@tccgrp.com.

From a Funder's Perspective: CCAT Quantifies Strengths

The CCAT isn't just for nonprofits. Private foundations and corporate funders of various sizes have also used the CCAT to contribute to nonprofit capacity-building efforts.

For the Pfizer Foundation, the CCAT was crucial to their Southern HIV/AIDS Prevention Initiative, a program to support culturally appropriate prevention programs targeting multi-cultural communities in nine Southern states.

Pfizer first administered the tool at the

beginning of their multi-year capacity building initiative in order to identify the organizations' strengths and opportunities for growth. At the end of the first year, the tool was re-administered in order to see the level of progress and to better tailor capacity-building activities as needed.

"The tool quantified the nonprofits' strengths in the four capacities and then we determined what capacity-building assistance to offer," said Erica Weinberg, Assistant Director of Global Philanthropy

at Pfizer Inc. Nonprofits were then offered management assistance, executive coaching or board development, based on the organization's scores.

Although the program is still in process, results so far have been impressive.

"Some organizations were able to put up websites that they didn't have before and now they're better able to reach people in the community. Other organizations have better board and governance relation-

continued on page 7 »

TCC Staff Profile: Susan Misra

After living in seven cities and three countries, Susan Misra has found her home at TCC Group. Previously, Misra was an economic justice organizer and public policy researcher. At TCC Group, she has been able to combine her understanding of people, groups, and quantitative research.

"The last three years have been a great learning opportunity, and the nice thing about my job is that there is constant change and growth," she said.

Misra currently manages multi-year initiatives for philanthropies, facilitates strategic business planning processes for nonprofit organizations, and conducts trainings on a range of issues such as fundraising, board development, and diversity. "I get to work with all kinds of organizations in arts and culture, social justice, the environment, and more. It allows me to draw on all of my experiences -- professional, academic, and volunteer."

One of Misra's recent projects was developing a business plan to build and operate a national retreat center for the Jewish Life Network. "I loved this project because we were able to take it from start to finish, and because it required creativity and analytical rigor to get an accurate picture of what was feasible," she said.

Misra co-led a process that interviewed and surveyed over two hundred stakeholders; drew on conference center, retreat, and real estate experts; and projected designs and finances for several scenarios.

"It was a complex, iterative, and detailed process," she says of the experience. "We kept our eye on the vision to figure out what would be the best solution. And now they are tak-

ing the plan and implementing it."

Misra has also co-designed and managed four capacity-building initiatives for private foundations and corporations. Currently, as one example, she is the project manager for TCC's work on the Challenge Fund for Journalism, an initiative supported by the Ford, Knight, and Ethics and Excellence in Journalism foundations to increase the financial sustainability of nonprofit journalism organizations.

"Our team enjoys building a personal relationship with each grantee, working with them to identify priorities and develop a capacity-building plan, and walking with them on their journey of organizational change," she said.

Outside of the office, Misra remains active in the nonprofit world by serving on the board of Border Crossers, which teaches elementary school students about race, racism, and how they can take social action to cross borders in their everyday lives.



Susan Misra

B.S. Psychology,
Lewis & Clark College
M.P.P. Kennedy School of
Government, Harvard
University

Areas of Expertise:

- Strategic & Business Planning
- Capacity Building
- Designing and managing multi-year initiatives

Contact:

P: 212-949-0990, ext 206
E: smisra@tccgrp.com

Letter (continued from page 1)

Second, there are increasing demands for accountability coming internally, from board members with private sector mindsets and externally, from the government and donors.

Third, some of the change has been fueled by grantmakers themselves, who decide to fund strategic planning work for their grantees, conduct more evaluation, or establish proactive management assistance and capacity-building programs for their grantees.

As a result, TCC's consulting work has evolved over the years as well. We have moved from a major concentration on planning; evaluation; and grantmaking services, including an increasing emphasis on designing and operating capacity-building programs. Organizational effectiveness has become an overarching theme that guides our work.

However, our mission has remained constant. TCC's newest product, the Core

Capacity Assessment Tool, to be launched to the public this spring, is part of our focus on building capacity. I urge you to read the front page article on the CCAT, the newest in our strategies to help create social impact.

Richard A. Mittenthal
President and CEO

CASE STUDY: World Neighbors

CHALLENGE: Strengthen the infrastructure of an international development organization

By 2004, World Neighbors (WN) had reached a critical juncture: For more than a half-century, this international development organization had worked closely with marginalized communities in Asia, Africa and Latin America in addressing hunger, poverty, disease and other challenges. But the organization faced numerous challenges of its own, including a shrinking revenue base, inadequate internal communications and an outmoded infrastructure.

SOLUTION: Develop a strategic plan

The appointment that year of Melanie Macdonald as president and chief executive officer prompted a decision to begin work on a three-year strategic plan. Guided by TCC Group, the planning effort was notable for the high level of commitment and participation by board members and professional staff, and for its far-ranging inclusiveness. All stakeholder groups -- including donor organizations, trustees, domestic and international staff and volunteers -- had a voice in the process, which unfolded over a one year period.

The resulting comprehensive plan incorporated recommendations on virtually every aspect of WN's operations, such as human resources, financial reporting, resource development, marketing, governance and technology systems. These recommendations were developed by staff/volunteer subgroups across World Neighbors with critical support and facilitation by TCC. The one area that remained largely unscrutinized and unchanged was WN's mission and program objectives. "There was no dissension or concern about our purpose as an organization," says Macdonald. "We had full alignment across our entire team."

RESULTS: Significant changes led to a sustainable future

Approved unanimously by the board in April 2005, the plan

has thus far provided the basis for a number of significant changes:

- **Marketing:** To raise WN's profile -- especially among potential funders -- a marketing department was created and charged with developing and strengthening a new World Neighbors brand via revamped print and other communication materials, along with many initiatives to boost World Neighbors profile across the U.S.
- **Resource development:** In a campaign to broaden and solidify WN's financial base, WN has heightened its emphasis on long-term giving, creating a dedicated associate vice president level position to oversee that effort. Other staff roles were added to support a range of new fundraising strategies.
- **Operations:** To address long-standing inefficiencies in its financial accounting and reporting systems, WN has begun the process to roll out new software applications, formats and systems worldwide, as per the strategic planning objectives.
- **Human resources:** For the first time in its history, WN affirmed the international scope of the vice president of HR, reflecting a renewed commitment to recruiting and retaining top-tier professionals as well as expanding the organization's volunteer force. In the first year of plan implementation, the number of volunteers was increased from 100 to 600.



Photo from World Neighbors

"It's no exaggeration to say that the problems we faced threatened our viability as an organization," says Macdonald. "TCC's knowledgeable and creative support has helped put us on track to a sustainable future."

One of TCC's most valuable contributions, she adds, "was its ability to help our staff in assessing our weaknesses as well as our strengths and helping us determine what we needed to do to ensure our survival as an organization. TCC's role was central to this highly successful strategic planning process and to our continuing success with implementation of that plan."

For more information on TCC's focus on results, we encourage you to visit our website at www.tccgrp.com. Additional results oriented case studies can be found under the option, "Our Results."

Current and Recent Work

TCC Group consultants are working on a number of health programs in Philadelphia. TCC will serve as primary facilitator for the **Arthur Ashe Institute for Urban Health** STEPS to a Healthier Philadelphia Initiative, a chronic disease prevention/intervention program targeting African-American and Latina Women in beauty salons in West and North Philadelphia. Additionally, for the **Philadelphia Department of Public Health**, TCC is providing support for a major health initiative. This project is designed to create the Health Leadership Partnership which will facilitate greater efficiencies in the health care system and ensure that all Philadelphians have access to decent health care.

Episcopal Community Services has retained TCC Group to assist with the design of an appropriate and effective evaluation system for the multiple programs within the organization.

TCC assisted the **Pfizer Foundation** in the development and launch of its new domestic HIV/AIDS initiative, which is targeting 10 states for a multi-year, multi-million dollar investment in HIV/AIDS prevention programs. TCC will also assist in the management of the Initiative while working closely with grantees.



TCC was recently retained by **Gap Foundation** to evaluate its Youth Signature Program, a program to improve job readiness for underserved youth. TCC was brought in

during the planning and pre-implementation phase to assist in setting outcome goals and measures and indicators of success.

TCC was engaged to conduct a four-year evaluation of the **Robert Wood Johnson Foundation's** partnership with the Northwest Health Foundation regarding their grantmaking Initiative: Partners Investing in Nursing's Future.



This fall, TCC's Paul Connolly led foundation staff in training sessions

on organizational development and capacity building for **The Andrea and Charles Bronfman Philanthropies** and the **Evelyn and Walter Haas Jr. Fund**. Connolly also developed and presented a workshop at Harvard University on financial sustainability for journalism grantees of **The John S. and James L. Knight Foundation**.

TCC Group's corporate practice recently finished conducting research for **Altria** on best practices structure and staffing models for international corporate grantmaking programs.

TCC Group assisted the **Partnership for Clear Health Communication** (PCHC) with the development of a business plan for PCHC in 2004. The organization is in the midst of transition due to the departure of its executive director and has hired TCC Group to assist with the development of strategic options for the future.

TCC was recently hired for two environmental projects. For **The Chesapeake Bay Trust** Capacity Building Initiative, TCC will review and provide input and advice on the initiative's goals, logic model framework, and the final draft

design of the program. TCC will also develop an assessment tool, assist with evaluating assessments, and provide train-the-trainer workshops to local area service providers. Meanwhile, in New York, **Friends of Hudson River Park** has contracted with TCC Group to facilitate a strategic planning process that will result in a road map for transitioning from an advocacy organization to a long-term community institution.



The Safer Foundation in Chicago is one of the largest and most respected organizations in the country that works with prisoner re-entry issues. TCC Group is assisting Safer with the development of a strategic plan that will guide their work from 2007 through 2010.

TCC Group is assisting **America's Second Harvest** with the anti-hunger organization's strategic planning process. TCC Group also worked with America's Second Harvest on its prior plan, completed in 2003.



TCC was recently retained by **Radian Group**, a Philadelphia-based global credit risk company. Under new leadership since 2005, Radian Group is interested in further expanding its community relations programs, especially at the employee level. TCC will help Radian Group determine the potential of community relations at Radian, strengthen existing programs, and create new, complementary programs to maximize the company's impact on its business and communities.

Staff Updates

TCC welcomes **Talia Stinson** as a new Research Associate in the Philadelphia office. Talia is a graduate of the University of Pennsylvania with a major in English and a minor in Sociology. Most recently, she was working with SCORE! Educational Centers as a program director.



The firm has hired **Yvette Detres** as a Finance/ Accounting Associate. Yvette previously worked with the Strang Cancer Prevention Center as an accountant. **Ivellisse Woodson** also joined TCC as an Administrative Assistant.

Richard Mittenthal was recently invited to become a member of the Council of the Aspen Institute's Nonprofit Sector and Philanthropy Program.

Tom Knowlton joined the board of Pax.

Jan Brown recently joined the board of Asia Catalyst, a nonprofit that inspires, supports, and incubates emerging movements for human rights, social justice, and the environment in China and Burma (Myanmar).

Staff consultant **Susan Misra** recently attended the Alliance for Nonprofit Management's Cultural Competency Institute in New York.

The following consultants recently became inaugural members of the National Network of Consultants to Grantmakers (NCCG): **Richard Mittenthal, Paul Connolly, Carol Gallo, Chantell Johnson,** and **Ashley Snowdon.** **Carol Gallo** also joined the Programs Committee of the NCCG.

The firm wishes farewell to Consultant **DeShele Dorsey** who accepted a position as a Senior Director with Changing Our World and Human Resources Associate **Jan Mendieta** who joined KKR Private Equity Investors.

Coming Soon:

Presentations:

Ashley Snowdon will participate in a panel discussion on "Engaging the Next Generation: Social Change Philanthropy" on February 25th as part of the 2007 Family Foundation Conference in Baltimore. For additional information, visit www.cof.org.

Paul Connolly will help present a session with Marty Campbell of The James Irvine Foundation and Elizabeth George of Deaconess Foundation on designing long-term capacity-building initiatives at the Grantmakers for Effective Organizations Organizational Learning conference on May 16-17 in New Orleans. See www.geofunders.org for more information.

Workshops:

The Philadelphia office is planning a workshop for nonprofits on "Nonprofit Organizational Effectiveness" to be held in the spring of 2007. To sign up, please contact the Philadelphia office at (215) 568-0399.

Briefing papers:

TCC is preparing to publish "**Deeper Capacity Building for Greater Impact: Developing a Long-term Initiative to Strengthen a Set of Nonprofit Organizations.**" This publication was made possible through generous support from The James Irvine Foundation. Copies of the briefing paper will be available on our website at www.tccgrp.com or you may request a hard copy by emailing info@tccgrp.com.

BOARD OF DIRECTORS

Richard Mittenthal
President and CEO

Paul Connolly
Senior Vice President

Shelly Kessler
Vice President and CFO

Thomas W. Knowlton
Vice President

Peter York
Vice President

PROFESSIONAL STAFF

Lois Chierico
Director of Finance

Stephen Bumbaugh
Senior Consultant

Carol Gallo
Senior Consultant

Chantell Johnson
Senior Consultant

Sally Munemitsu
Senior Consultant

Anne Sherman
Senior Consultant

Shao-Chee Sim
Senior Evaluation Consultant

Jennifer Avers

Judy Barci

Artis Bergman

Janice Brown

Ashley DelBianco

Yvette Detres

Kristen Ellis

Denise Finley

Herma Hackshaw

Amesha Hidalgo

Susan Misra

Ana Ramos-Hernandez

Alexandrea Ravenelle

Jared Raynor

Isaac Scott

Ashley Snowdon

Talia Stinson

Ivellisse Woodson

AFFILIATES

Michael Allison

Marcy Hinand Cady

Alice Ginsberg

Ricardo Millett

Julie Malloy

Jenny Ellis Richards

John Riggan

Jennifer Li Shen

Tom Stephens

Recent Presentations

On August 3, Paul Connolly and Pete York co-presented "Capacity Building for Organizational Effectiveness" at the **Alliance for Nonprofit Management** annual conference in Los Angeles.



the Grantmaking 101 series on October 18.

Susan Misra presented "Strategic Planning: A 'How-to' Guide" at **Interpride**, a conference of PRIDE organizations from around the world in Portland, Maine in October.

Also in October, Jen Avers presented "Measuring and Reporting Community Impact" at the Net Impact Conference: Navigating Global Change hosted by **Northwestern University's Kellogg School of Management**. Fellow panelists included Nicole Robinson, Director of Focused Giving for Kraft Foods Global Community Involvement and Jason Cascarino, Manager of the Chicago Public Education Fund. Pranav Kothari of Mission Measurement served as moderator.



From October 26-28, Paul Connolly presented on leadership development and other topics at the **Association of Small Foundations** conference in New Orleans.

Senior Consultant Sally Munemitsu served on a nonprofit careers panel at

the Wharton Women in Business Conference at **Wharton Business School** in November.

On November 9th, Pete York served on a panel on "Best Practices in Evaluations: Strategies to Help Nonprofit Organizations Measure Success" for the **New York Technical Assistance Providers Network** (NYTAP).

On November 10, Paul Connolly presented on "Philanthropic Investment" at the **Yale School of Management** conference on "The Future of Philanthropy."

On November 14, Tom Knowlton served on a webinar panel on "Future Trends and Critical Issues in Corporate Philanthropy" hosted by the **South Florida Donors Forum**. Ann Cramer from IBM and Charles Moore from the Committee to Encourage Corporate Philanthropy also served as panelists while Kim Bentley, Director of Charitable Giving & Corporate Affairs at JM Family Enterprises, Inc moderated the session.



On September 13, Paul Connolly gave a "Meet the Author" presentation as part of **The Foundation Center's** 50th anniversary celebration. Connolly spoke on his book *Navigating the Organizational Lifecycle: A Capacity-Building Guide for Nonprofit Leaders*.



On October 3, Shelly Kessler spoke to the **North Penn Nonprofit Academy** about "Navigating the Organizational Lifecycle: Capacity-Building for Nonprofit Leaders."



Pete York presented "Evaluative Learning: Making Evaluation Work for Everyone" as part of the **New York Regional Association of Grantmakers** Professional Development Program in

Funders (continued from page 2)

ships. In one instance, we provided executive coaching to an organization with a new Executive Director who was really struggling," Weinberg said. Other capacity-building efforts also led to board expansion and cross training nonprofit staff.

Both the CCAT and the intensive capacity building were new approaches for Pfizer.

"This paid off tenfold," Weinberg said. "I would absolutely recommend this to any other funder. When you're thinking about impact in communities over time, investing in capacity building is the key to making organizations sustainable. It's about strengthening the organizations to better deliver services and serve their constituents."

Our New Philadelphia Address:

One Penn Center
Suite 410
Philadelphia, PA 19103

Phone: (215) 568-0399
Fax: (215) 568-2619

50 East 42nd Street
19th Floor
New York, NY 10017

Philadelphia ■ New York ■ Chicago

strategies to achieve social impact



perspectives

a newsletter for the clients and friends of TCC Group

Winter 2007

INSIDE:

CCAT Helps Nonprofits Realize Capacity

CEO's Message

Staff Profile: Susan Misra

Case Study: World Neighbors

Current & Recent Work

Staff Updates

Coming Soon

Recent Presentations

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 agencies

WHAT WE DO:

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

CONTACT US:

Chicago
875 North Michigan Ave.
31st Floor
Chicago, IL 60611
phone: 312.794.7780
fax: 312.794.7781

New York
50 East 42nd Street
19th Floor
New York, NY 10017
phone: 212.949.0990
fax: 212.949.1672

Philadelphia
One Penn Center
Suite 410
Philadelphia, PA 19103
phone: 215.568.0399
fax: 215.568.2619