



The Leadership Conversations

By Cathy Card Sterling, Vice President
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Schultz & Williams

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Over the course of several months, Schultz & Williams vice president Cathy Card Sterling discussed burning issues facing today's nonprofits with leaders representing all types of organizations. This paper, originally published as a series of blog posts, summarizes her findings.

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Introduction

For more than three decades, I have continually drawn inspiration from the exceptional nonprofit leaders with whom I've worked—leaders of all types of organizations, from large well-branded national entities to start-ups and disrupters hoping to build a new movement or drive an innovative approach to solving a challenge.

In his 2001 bestselling book, *Good to Great*, Jim Collins identified individuals such as these as “Level 5 Leaders”—humble people who are driven by what's best for the company or organization. In the nonprofit arena, these leaders have taken their organizations to new levels of service and have engaged their audiences and the public through a relentless desire and understanding of how to power their missions.

My colleagues at Schultz & Williams and I have long held the belief that inspired leadership is the “special sauce” in every successful nonprofit, and that “Level 5 Leadership”—combined with a clear, compelling mission and vision, a significant number of deeply engaged stakeholders and donors, and a top-notch staff—can create dramatic and winning results.

Our goal at Schultz & Williams is to provide our readers and clients with ever more inspiration to draw upon. What better place to start than through a series of conversations with some of these impressive nonprofit leaders? Through four interviews, we bring you insights from the field as we delve into topics critical to the health of organizations with these individuals.

The leaders we interviewed have held a variety of positions and represent a wide range of sectors—including education, arts and culture, and environment/conservation. Each conversation examined key issues that we see as pivotal to nonprofit sustainability and success.

Among the areas we explored are:

- Identifying and recruiting top talent (or “getting the right people on the bus”).

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- Building relationships with key stakeholders—donors, thought leaders, influencers, academics and audiences.
- Understanding the trends and complexities of the nonprofit ecosystem.
- Balancing near-term revenue with long-term sustainability and the role of strategic planning in today’s nonprofit environment.
- Utilizing technology to drive innovation in communications and accelerate the growth of new initiatives that will strengthen and enliven the organization.
- Building a culture of philanthropy.

We also invite you to respond to this initiative by connecting to me personally at csterling@schultzwilliams.com.

Building a Culture of Philanthropy

Interview with Joan Wages-7/18 President Emerita National Women's History Museum



Our first conversation explored building a culture of philanthropy with Joan Wages, president emerita of the National Women's History Museum (NWHM).

Joan served as president and CEO of the NWHM for ten years from 2007–2017. The vision of NWHM is to build a world-class museum at the National Mall in Washington, D.C. It will be the first museum in any nation's capital to show the full scope of the history of its women and will serve as a guiding light to people everywhere. The current online museum honors, and raises awareness about, women's diverse experiences and achievements through educational programs, scholarship and research.

Here, in a simple Q&A format, is what we learned in our conversation.

Q. Cathy Card Sterling (CCS): What were your first steps toward building a culture of philanthropy?

A. Joan Wages (JW): When I first started at the Museum, I did so without the experience of leading a philanthropically focused organization. I had served on nonprofit Boards, but this was entirely different. I adopted a dual process, looking at the organization and its priorities, and at the skills I personally brought to the table. From there, we determined the Board and staff's specific roles. Philanthropy had to be the focus since our goal was to potentially raise \$400 million to build a physical museum on the National Mall. We worked with the Board and staff to form the basis of a philanthropic culture.

Q. CCS: What is the connection between program and philanthropy at the Museum?

A. JW: We realized early on that program is integral to our philanthropic efforts. Delivering on our mission—to disseminate information on the history of women and to build a museum on the National Mall—was the fundamental

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reason our members and donors were, and are, deeply engaged. We built our résumé of excellent projects to validate our organization. And, our direct response team brilliantly advised us on how to message our program specifically to attract members and donors. Our efforts resulted in outstanding results.

Q. CCS: Your collaborations have been critical, what are the standout partnerships during your tenure?

A. JW: From the beginning, we knew we needed partners, especially because we had no physical museum. Through these partnerships, we held two exhibitions at the Women in the Military Memorial, thanks to one of our Board members, Brig. General Wilma Vaught (Ret.). We also partnered with the American Red Cross, which has significant material on the role of women during WWII. And, we partnered with National History Day, reaching more than half a million students around the world, providing a sponsored scholarship to one participant each year. We have 53 women's organizations in our coalition who work with us to demonstrate to Congress that there is significant national support for our Museum.

Q. CCS: Many people believe that building a culture of philanthropy is about giving your donors and stakeholders a voice. Your members have been ardent and loyal supporters. You are very clear in your messaging; you talk to members in an inspiring, transparent and inclusive way. This story is about grass roots and the members who have kept this going for 20 years. The donor's voice has always been solicited through online media at NWHM. How has this benefited your cause?

A. JW: Again, I credit our direct response team for ensuring that we always ask our members and donors what inspires them about the Museum and then we build relevant programs and content into our membership campaigns. We are frequently talking to our members through surveys, and continually meeting with donors, listening to what they connect to through our work.

Q. CCS: Building celebratory events and "campfires" is something at which NWHM excels. What are some of the standout events that you think have been important to building your community of donors?

A. JW: Our first event, which was the 100th Anniversary of *Good Housekeeping*, a Hearst magazine, at CitiCenter in New York City, was a great gift and partnership. It helped us launch into a new phase through significant production support and mega stars. These events opened our eyes to what is involved in doing sophisticated events. Our key misstep was that we didn't shoot high enough. Our East and West Coast galas are now critical to our success as a virtual museum and in building name recognition.

Q. CCS: What is the Board's role in building a culture of philanthropy?

A. JW: It is critical to bring people onto the Board who have experience as nonprofit Board members and who understand that they have financial obligations to ensure the Museum's success. You can't have a culture of philanthropy if leadership isn't committed to it. Figuring out how all the pieces—the Board, program, communications, collaborations and partnerships—work together is our focus.

Q. CCS: What is your personal approach to individual major donors in building this culture of philanthropy?

A. JW: I am always as transparent and authentic with them as possible. I think of each individual high-level donor as a friend and ally. It comes down to listening to what they think is important. Women want this museum to happen, this is a common thread. They often are surprised to realize that there isn't one already.

End Note

In March 2017, U.S. Representatives Carolyn Maloney (D-NY) and Ed Royce (R-CA) introduced H.R. 19, which currently has 252 cosponsors. In addition, Senators Susan Collins (R-ME) and Dianne Feinstein (D-CA) introduced companion legislation in the Senate. The bills establish a comprehensive women's history museum and it designates potential sites on the National Mall for the physical museum. While this is the Museum's biggest milestone to date, it still has a long way to go to make it a reality. Nothing moves fast in Washington, and it is expected that certain aspects of the bill will change as it makes its way through the legislative process.

Getting the Right People on the Bus

Interview with Courtney Surls-9/18 Vice President for Development and Alumni Relations, American University



In our second conversation, Courtney Surls, vice president for development and alumni relations at American University, spoke with us about recruiting top-tier individuals in order to “get the right people on the bus.”

Courtney has served as vice president at American University since 2015. Previously, she served as senior vice president for development at the Newseum and as vice president for development at the University of Southern California.

Here, in a simple Q&A format, is what we learned in our conversation.

Q. Cathy Card Sterling (CCS): Half of all senior fundraising professionals report they expect to leave their jobs within two years, and half of all VPs of development report that they have a very difficult time finding qualified people. Is there something amiss in the development model (a model that has existed for some time) that makes it particularly difficult to recruit great individuals?

A. Courtney Surls (CS): First, let me say, I believe that development works. If you follow development science mixed with the art of the individual, it works. It works whether you are a powerhouse or a brand-new start-up. The problem is that these principles, in order to succeed, require that the entire organization understands and agrees with those best practices. Whether or not this culture exists strongly impacts the experience, talent level and performance of the people you hire. The general principles of development are focused on the idea that the function of the advancement team is to facilitate the activities used to attract philanthropic dollars (meetings, communications, events, travel, point of interest articles) in partnership with the individual leaders within the organization who are overseeing the content and mission. If roles are not clearly understood within the organization at all levels, development teams will have a very difficult time.

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The other piece is that I don't believe that the development process is transactional. Even when you're talking about direct response and annual giving, strategy and messaging, when combined with the use of data, produce good development decisions. Strategy is so important, the use of data is so important, and understanding that everyone has a role in connecting donors to the mission is vital. No major gift solicitation should happen until you are sure that you have the right project, the right gift range and the right person sitting down to talk with the prospect. Great development people spend their time validating what starts as a hypothesis about what a stakeholder is interested in, what the level of that interest is, and who within the institution can amplify that interest. This is a disciplined undertaking.

Q. CCS: We live in a highly transactional culture, whereas best practice development work is a long-term proposition. How, then, do you define the disconnects in development work and address them?

A. CS: One of the disconnects comes if the president, director or Board members believe that development is transactional rather than focusing on the discipline of development. Leaders who are responsible for delivering on the mission and its programs must understand that development is not transactional, that their role in this effort is significant, and that they must be a pivotal part of philanthropy in advancing and validating donors' commitments to the program. If the head of the organization does not understand this and doesn't telegraph this to the entire institution, there is a disconnect with the development team in terms of what their roles and responsibilities are.

It is fascinating to me how people view development. A CEO would never question the CFO. The rules are set, yet they don't provide the same level of trust and belief for their development leadership. CEOs often don't know how to measure competence, and we need to help them with that.

Q. CCS: What has been a game changer for you at American University?

A. CS: We're committed to educating everyone in the organization about development, and we've conducted multiple retreats for nondevelopment people to explain the fundamentals of our work. With our advancement team, we kicked off our latest meeting with a podcast on what it means to be a data-driven organization. People walked away from the retreat understanding how

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development relies on many factors for success—strategy, data, relationships, looking at the situation and defining what the near- and long-term implications are of our work.

Q. CCS: If you were looking for mid-career, major gifts superstars, what qualities would you look for?

A. CS: It is very important for the hiring manager to understand what is needed in the current environment and to have an understanding of where development is within the organization. There are times when development people need to be an integral part of building the culture of philanthropy from within. Some development people come in and expect significant groundwork and support (research, proposal preparation, well-versed faculty) to be in place, and are not prepared to create new relationships and start from square one. Development professionals need to relate well to senior-level program leaders and must understand where a program fits into the overall strategy and mission. We must hire the skill set that is needed within the given environment and context.

Q. CCS: Do you think that the development team is pivotal in the creation of new programmatic initiatives?

A. CS: Yes, this goes back to the whole issue of facilitating the philanthropic effort. If you know you have a donor who is interested in a particular project, you have to convince the program person to work with you on evolving the project and answering the big question: What is the problem you are trying to solve? Then saying, “Thank you for this content, now we’ll need to translate this for the donor.” This is a delicate dance that takes special skills to execute. This ability to knit the organization together is enormously hard to find. You’re not going to find a person like that for every position. It’s important to understand which position needs this skill. Also, development team members need to understand that part of their job is knowing what levers to pull in order to get the right outcome. Development is not sales. The real issue is to understand with whom a prospect needs to interrelate. Does this person need to be part of the trustees’ circle, engaged with other peers interested in the organization or something else—that needs to be the discussion.

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Q. CCS: So what is it you are looking for in a candidate and what questions do you ask?

A. CS: I always ask, “How do you use data to make decisions?” The person who can think strategically is very valuable. Asking them why they do something is important. Finding someone who can develop an idea and execute it is incredibly valuable. This requires an understanding of what the barriers are. We need problem-solvers who can figure out how to overcome obstacles. Also, development does not work when the team has a view of itself as a group of independent salespeople. We must recruit people who understand collaboration and partnership. The opposite does not work; this is not sales.

Q. CCS: What is the ideal development framework? What are we missing? Are there shifts that should be made to the development division?

A. CS: There are two areas where we need to assert ourselves. First, we need to make clear that development must be part of the conversation around the economics of the institution. Development leaders need to have a keen understanding of the role philanthropy plays in the financial structure of the organization. Secondly, it is imperative that development plays a central role in strategic planning. We need our Board members and CEOs to understand why the development voice is critical to strategic and economic decisions; we need to advocate for this. We cannot build a culture of philanthropy without a seat at the table.

End Note

Over the past two years, focusing on the best practice development principles discussed above, American University has realized a new level of principal gifts, including two significant gifts announced in the fall. Building on this success, the university is in the quiet phase of a new campaign, its largest comprehensive campaign in history. A new science building has just begun construction and the university publically launched its new Sine Institute of Policy and Politics recently. Finally, the university is putting the finishing touches on its new strategic plan in tandem with the early stages of its historic campaign.

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Balancing Near-Term Financial Health with Long-Term Institutional Stability

**Interview with John E. “Jeb” Byers–10/18
Head of School
Christchurch School**



Our third conversation explored balancing near-term financial health with long-term institutional stability installment with John E. “Jeb” Byers, head of school at Christchurch School.

Jeb Byers has been at Christchurch for 30 years, 19 years as head of school. Prior to his appointment as head, he served on the faculty. Located on 125 acres on the Northern Neck of Virginia on the Rappahannock River, Christchurch is an Episcopal coed college-preparatory school for boarding and day students, grades 9-12.

Here, in a simple Q&A format, is what we learned in our conversation.

Q. Cathy Card Sterling (CCS): First, how do you define near-term financial health and long-term sustainability? Are you referring to pure financial considerations, that is, the bottom line, or are you and your Board charged with something that is more far-reaching, a double bottom line that focuses on both financials and delivery of mission?

A. John E. Byers (JEB): In the near term, quarter by quarter, year by year, we have to be fiscally responsible, but, in addition to the numbers, we have to ensure that we are planning for the delivery of our mission well into the future, a future that will be quite different from where we are now. We work very hard to keep this fragile mission alive.

So, we take it one step at a time. We budget very conservatively with the intention that we will exceed expectations on the admissions/revenue side and that we will exceed our net tuition revenue goals. With these funds we seed our next level of innovation. Three years ago we repackaged our debt at a very

favorable rate and pledged to the Board that we would not only meet all budget goals, but we would also establish the policy that 7% of every dollar would be invested in an endowment to establish a reserve fund. With the 7% discipline established five years ago, we have accrued significant funds with which to continue to plan our vibrant future.

Q. CCS: How does your school's value proposition play into this? How do you manage to be a highly valued independent school within set financial parameters that are fundamentally premised on the model of tuition as the principle revenue stream? How do you compete with schools with much greater means?

A. JEB: Because Christchurch is a "small" shop, we decided that our metrics would be different. Of course, fundamental financial health had to be in place. But in 2005, we decided that we needed to do something very different. We decided that we would never be a competitor in the "arms race"—as we refer to the race to build the next beautiful building. Nor would we participate in the SAT or AP race. If those continued to be our metrics, we would continue to be a school with modest ambitions. Beginning with a Board retreat in 2005, the school went to work on establishing a new kind of school on its decades-old traditions. We looked at our strengths. The standout strength we determined was our history as an innovator.

We had been a cutting-edge innovator in the field of learning skills, evolving best practices for teaching students with learning differences. So, we knew innovation was one of our strengths. We looked at our amazing physical location on the Rappahannock River and we began to riff on what this location really meant to the students. We started delving into what leaders were saying about how students learn and began to build our experiential curriculum. The "Great Journeys Begin at the River" curriculum evolved over several years. We had a dedicated team of 25 teachers, scientists, coaches and others who worked on this curriculum. This did not emerge fully formed, but we have worked on it over many years, constantly tweaking and shifting our perspective.

Q. CCS: Watching the evolution of the Great Journeys program, what do you see as the key factors to establishing a sustainable future for the school?

A. JEB: There are many lessons here. First, we started with a very **deeply felt mission** of inspiring and guiding students in their unique journeys to self-confidence, purpose and identity. Not only did we focus on mission, but we focused on our **core values** of delivering on that mission with hard work, service and relationships. Second, from the financial perspective, we had to be **very selective**. With each new idea we needed to define the owner and the donor, who was going to implement it and who was going to fund it. Third, we wanted an **innovative mindset** amongst our entire team; in our small-shop world, innovation equals growth. With that innovation comes a constant tweaking, never standing still, asking what resources we need to do something. Fourth, we needed to be very constant and deliberate about professional development, creating a deep bench by enabling our agile faculty to stay ahead. I see this as a real key to innovation.

Q. CCS: What are the tangible outcomes of this approach to growth and sustainability?

A. JEB: Based on our Great Journeys approach to our students and our curriculum, we now have what could be called an artisanal or handcrafted approach to learning and teaching. We have advanced our curriculum to provide premier integrative place-based learning. Our learning skills program is still cutting-edge and emulated nationally. We now have a nationally recognized program in marine science. We have a global travel program, a robotics lab and a world-class sailing team. We teach collaboration and real-world skills.

Q. CCS: How do you quantify these outcomes?

A. JEB: We quantify these with stories, with tangible illustrations, with student outcomes after graduation. We are creating individuals who could drop down into New Delhi or Charlottesville, Virginia, and they would want to know: What are the politics here, what are the key industrial pieces, what is going on here? To me, that is the outcome we are looking for.

Q. CCS: How do you position this with donors?

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A. JEB: We are learning how best to do this. Our Board, donors and the entire team work very hard to clearly articulate the mission of the school and that ensuring a sustainable school is quite simply what we do and what we are all about. No donor is going to give if they don't see a growing, thriving, solvent school. We hope that this will continue to play out with bequests and significant gifts in the future. We like to articulate our approach to a balanced budget and our 7% discipline to grow reserves. We have been net positive on the budget side for more than 20 years. We stress the highest levels of innovation to support our community of students, faculty and donors.

End Note

At a recent parent/teacher conference in the school's Puller Marine and Environmental Science Center, a parent stood up after the meeting and wrote on the white board: #wortheverypenny. In 2020-2021, Christchurch School will celebrate its centennial anniversary with a focus on its future and its dedication to its students and families.

The Role of Strategic Planning in Today's Nonprofit Environment

Interview with Andrew Bowman-11/18 President Land Trust Alliance



Our fourth conversation was with Andrew Bowman, president of the Land Trust Alliance, about the role of strategic planning in today's nonprofit environment.

The Land Trust Alliance is a national land conservation organization that works to save the places people need and love by strengthening land conservation across America. Based in Washington, D.C., the Alliance leads and serves a community of 1,000 nonprofit land trusts, with 200,000 volunteers and 4.6 million supporters. Land trusts collectively have conserved more than 56 million acres of parks and playgrounds, vital waters and wildlife habitats, family farms and working ranches, and the special places that give us life and connect us to our culture, history and one another.

Before joining the Alliance in February 2016, Andrew served as the Doris Duke Charitable Foundation's program director for the environment. In that capacity, he oversaw all environmental grant making for the foundation. During his 11 years at the foundation, Andrew developed and obtained approval of \$100 million in grants. He also served for a time there as director of the foundation's Climate Change Initiative, a five-year grants program focused on climate change mitigation.

Prior to his work at the foundation, Andrew practiced law in Oregon for Defenders of Wildlife and at the law firm Perkins Coie LLP. He remains an active member of the Oregon State Bar.

Here, in a simple Q&A format, is what we learned in our conversation.

Q. Cathy Card Sterling (CCS): When you first arrived at the Land Trust Alliance, you inaugurated a strategic planning process. What were the main issues you wanted to address? Why were these issues the most significant to you?

A. Andrew Bowman (AJB): I assumed my role as president of the Land Trust Alliance in February of 2016. Just a few days before my official start date, the organization celebrated the successful completion of a capital campaign, which was designed to advance the organization’s 2010–2017 strategic plan. Not only was it time to start thinking about our next plan, but selfishly as the new president, I wanted to put my stamp on a new plan. We started laying the groundwork for our new plan in 2016, and the formal work started in early 2017.

We started by evaluating our performance and the impact of our previous plan. It became clear that we were doing many things right—and we will continue doing them. However, we surfaced two critical challenges:

1. The organization had a lot of what I’ll call “deferred maintenance.” I made the decision early on to practice extreme transparency; I acknowledged to our land trust members and our Board of Directors that we had a need to focus on ourselves.
2. Even before I came to the Alliance, I recognized that not enough people know or care about land trusts or private land conservation. I wanted to elevate the relevance of land trusts and their work to a new level.

So our plan ensures we will keep doing the valued, high-impact things we’ve been doing, but layered on top of that is a recognition that we need to focus on our own operations and on making conservation and the work of land trusts relevant to many more people.

Q. CCS: What was the make-up of the working strategic planning group in terms of Board and staff and other stakeholders? What were the advantages of bringing together this combination of people?

A. AJB: We retained a consultant who encouraged us to set up a strategic planning team with eight staff members and two Board members. We were careful to ensure a mix of different perspectives and skill sets on our planning team, with representation across different departments and with different lengths of tenure at the organization. We also made a point to avoid selecting what I’ll call the usual suspects; we wanted new voices in the mix. The one constant was that they were all smart, thoughtful and eager to engage.

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Notably, I was not on the team; I wanted the team members to be able to be open and candid and to feel ownership of the process and the ultimate plan. The energy and enthusiasm for this process was terrific. They didn't pull their punches, either; they were diligent in surfacing problems and creative in recommending solutions.

Q. CCS: What was the strategic planning process? Who were the key outside stakeholders involved in this process?

A. AJB: The consultant put in place a three-step process. It started with a discovery phase, which lasted about five months, in which they framed the issues. The firm did a comparative analysis of other similar organizations—both inside and outside of our sector—and benchmarked best practices. Then they conducted stakeholder interviews with Board members, donors, partners, policymakers and land trust members. The firm also prepared a comprehensive analysis of our revenue model and development practices. Finally, they fielded a staff survey and conducted focus groups with staff.

The results of all of this work were shared with the strategic planning team, whose role was to spend two months developing key findings and recommendations. They reaffirmed the Alliance's mission, vision and values, refined our model for impact, articulated our unique value proposition, revisited our business model and established near-term priorities. Ultimately, they produced a document that included a problem statement, a case for change, a vision, our value proposition and recommendations for organizational priorities.

From there I stepped in, along with other members of my executive management team, to work with the strategy team and the consultant to refine the recommendations and draft the actual plan.

I should note that a key component of the planning process was stakeholder engagement—beyond the initial interviews. From the beginning, we identified points at which we would brief our Board, staff, and the Land Trust Leadership Council—an important group of roughly 50 executive directors from high-impact land trusts from across the nation that represent well the constituency we serve. This was an iterative process.

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I should share that at one presentation to the Leadership Council in particular, I made the decision, in spite of some personal misgivings, to be completely candid about our organizational challenges. The response could not have been more gratifying and validating. They welcomed my transparency and even stepped up to offer suggestions for how they could help. It was a watershed moment in the development of the plan itself; their support gave us the courage to be open about the need to focus resources and attention on our own organizational needs. As one stakeholder put it, we needed to put on our own oxygen mask before making sure our seatmate had access to air.

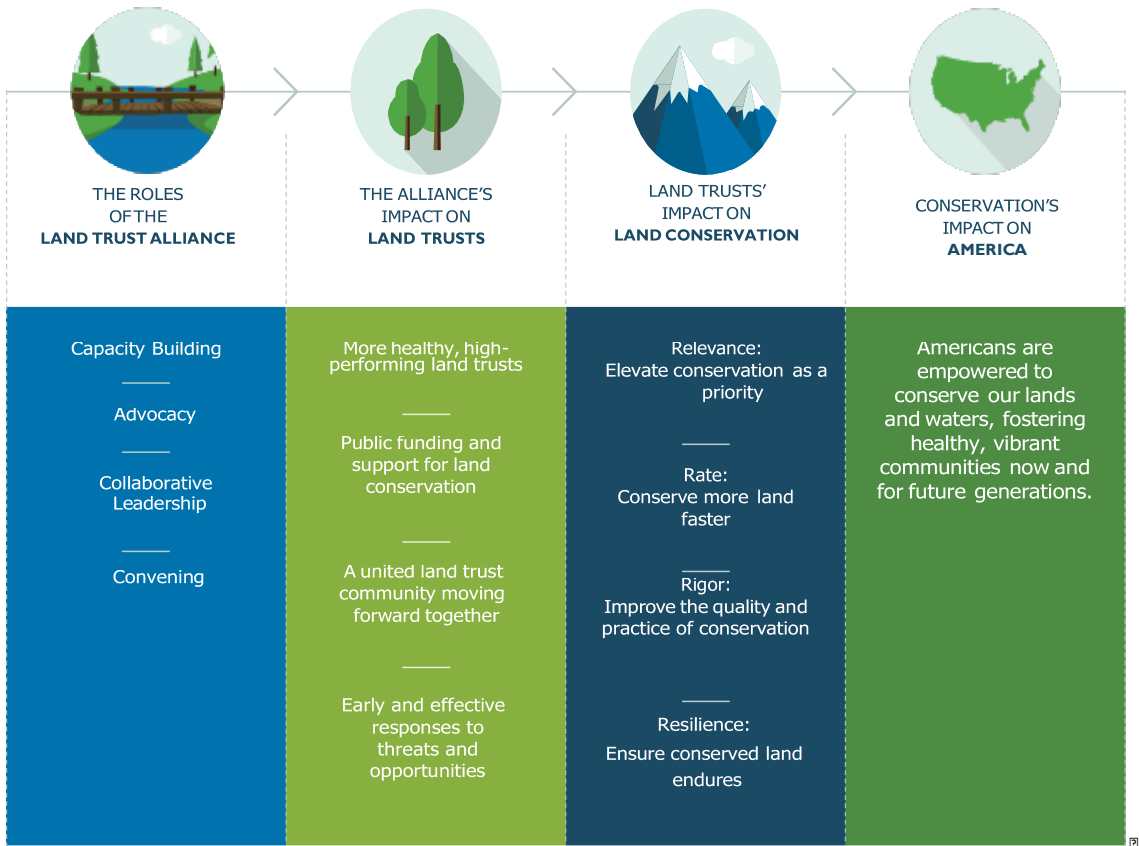
Q. CCS: Was the vision or mission reviewed and changed through this process? If so, how did that affect the goals and outcomes of the plan?

A. AJB: The strategy team recommended a small but important change to our mission statement. Specifically, we added two words, “need and”: “The mission of the Land Trust Alliance is to save the places people need and love by strengthening land conservation across America.” This reflects our goal to become more relevant. We recognize that while many of those who are already committed to our cause came because of a love of the land, for far too many Americans land and land conservation play little or no role in their lives, at least as far as they are aware. Yet we know that conserved, well-managed land provides pure drinking water, healthy food, clean air and places to reflect and recreate as well as protection from natural disasters, such as floods and drought. It also absorbs and keeps carbon from the Earth’s atmosphere. In other words, regardless of whether you love the land, you need it! (Though we certainly hope to convince more people to love it.)

Q. CCS: What were the big picture outcomes that emerged from this process?

A. AJB: We carefully laid out the challenges we face as an organization and as a community. Based on that we defined four conservation goals: Relevance, rate, rigor and resilience. Relevance was new to the picture.

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We also articulated our strategic approach and value proposition, with a focus on four areas of activity: capacity building, advocacy, collaborative leadership and convening. We laid out a model for how each of these activities impacts land trusts, land conservation and, ultimately, the nation as a whole.

The core of the plan is three priority initiatives: (1) Invest in internal organizational capacity needs to make the Alliance a more vital and sustainable institution; (2) Prioritize and deliver programs and services most important to land trusts; and (3) Design and launch a coalition-based “relevance campaign” to elevate the importance of land conservation in every community.

Q. CCS: What were the internal steps you took to implement the new strategic plan? What were or are the challenges to implementing the new plan?

A. AJB: It’s always a challenge to move from a high-level strategic document to a tactical plan, and it is essential to involve staff in that process. In fact, I

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would argue that you would never get the breadth of information and perspective that you need without their input.

The strategic plan was adopted by our Board in February of 2018. We continued to work with the consultant on an implementation plan, but, honestly, as well as they knew us and our work, they did not have the depth of understanding of our day-to-day operations and our expertise—of how we do what we do.

So, the rubber really hit the road this past summer in the context of our 2019 work planning. First, the executive management team developed ten objectives that support the three priority initiatives identified in the plan. I then asked each department to develop strategies to advance those objectives over the life of this plan. Importantly, I urged them to consider their roles in achieving all of the objectives, not just those that were clearly in their wheelhouse. In other words, the relevance campaign is not solely the responsibility of the communications team; we will not be successful in this endeavor if development doesn't help raise funds for campaign development, if our field staff don't provide us with stories to support the campaign messages, if our technology team doesn't prepare for adding new names to our database, etc.

Again, the executive management team consolidated and refined the identified strategies. The resulting list, along with the goals and objectives that make up the implementation plan, will guide our work over the next four years. For example, all 2019 work plans produced by the Alliance's various departments adhere to those strategies, providing a marriage of the big-picture vision and all of the steps it will take us to get there.

Importantly, that process, which involved every member of our staff, provides staff with ownership of the plan. They can all see their roles in advancing the objectives and, importantly, how we will all need to work together to attain our goals. Every individual and every department is essential to our success.

Q. CCS: Does the new strategic plan impact or change the business model for the Alliance? If so, how?

A. AJB: Our core work areas of focus do not change, but we are revisiting our revenue model, for example. We have more clarity on how we prioritize our

work. One goal is that we get better at saying no—we simply can't do everything at once or prior to finding additional resources. We are also recognizing a need to be better integrated across teams. And, of course, the relevance campaign is a huge new priority for us.

Q. CCS: How will you evaluate the plan over time?

A. AJB: The strategic plan identified metrics for each of the priority initiatives, which was an area of focus for the strategic planning team. Moreover, as part of the development of the implementation plan, staff were asked to identify what we should measure to track our progress against our strategies, objectives and priority initiatives. We still have work to do to set baselines for these, but knowing what we want to measure is an important first step.

Q. CCS: How did or will you communicate the plan to members and stakeholders? Is the plan primarily an internal document, or is it being used to help member trusts think about their role in their communities?

A. AJB: Again, I am committed to transparency. Moreover, because we are a membership organization, what we do has an impact on the land trust community; in some ways, this is a plan for the community.

We had an extensive communications plan in place once the plan was approved. We published the full plan and an executive summary to our website and we made printed versions of the executive summary available to stakeholders as well. We designed a PowerPoint presentation for staff to deliver to stakeholders around the country. We published a story in our magazine about the plan, and we devoted an issue of our monthly e-news to it as well. The great news is that, again, we got terrific feedback. In fact, some of our members have written posts for our blog in support of the plan.

End Note

AJB: Core to the Alliance's work on behalf of our land trusts members—historically and in our new strategic plan—is our federal policy program. As of this writing, we have just learned that Congress has reached agreement on the new Farm Bill, which is a significant source of federal funding for conservation and a priority for our organization. While we do not have all the details, we do

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know that our priorities will be reflected in the new legislation. This is terrific example of how our community has come together and stepped up under our leadership to advance our interests on Capitol Hill. Our members helped us identify key provisions, flew to D.C. to meet with their representatives, and have already started working with the Natural Resources Conservation Service on rulemaking for the conservation title.

“Land conservation is controversial here in Utah, but the Alliance’s Advocacy Program has allowed us to find common cause with our elected officials. And that saves land.” —Cheryl Fox, Executive Director, Summit Land Conservancy in Utah.

Conclusion

No one organization or leader exists in a vacuum. Conversations with leaders who have catapulted their missions to new heights both inspire and offer insight into the nonprofit landscape for the important work at hand. It is our hope that this initiative elevates your own endeavors on behalf of your organization.

Works Cited

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About the Author

Cathy Sterling has devoted the past three decades to focusing on the advancement of the nonprofit sector in the nation’s capital and across the country. She believes that the ultimate strength and integrity of our cities and communities depends on the health of our nonprofit institutions. Cathy brings to Schultz & Williams and its clients her extensive experience in governance and Board training, institutional advancement, managing during transition and results-oriented communication. Her specific areas of focus are capital campaign planning and implementation, major gifts fundraising and stewardship, messaging, communications, and Board strengthening.

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Building on her nonprofit leadership experience, Cathy now heads S&W's Washington, D.C., office. Since joining the firm, she has partnered with numerous clients from the cultural arts, environmental and social service arenas, counseling them on advancing their organizations, designing new development programs, planning and launching capital campaigns, and creating successful solicitation strategies for campaign leadership and major donors. Most recently, Cathy provided development counsel for the National Women's History Museum's \$450 million campaign, served as interim vice president for development for Scholarship America and designed a \$30 million capital campaign for a new cultural center in Columbia, MD. Her many clients have included The Phillips Collection, the Corcoran Gallery of Art, the American Shakespeare Center, the American Alliance of Museums, The Wilderness Society, Chimp Haven, Meals on Wheels Association of America Foundation, and the Trust for the National Mall.

Prior to joining S&W, Cathy served as vice president for development at WETA, the flagship public broadcasting station in Washington, D.C., where she helped plan and implement their Campaign for the New Century and advanced their Board and volunteer leadership. She has also served as director of corporate and foundation relations for the Phillips Collection and as administrative officer with the Corcoran Gallery of Art.

Cathy is a former advisor to The Fund for Arts and Culture in Central and Eastern Europe. She speaks widely on fundraising topics and was a master teacher within the national Public Broadcasting System. She has conducted seminars in Russia, sponsored by The Fund for Arts and Culture, on public sector management and fundraising issues. She currently serves on the Board of the Barker Foundation. Cathy holds a bachelor's degree from Wheaton College (Norton, MA) and an M.B.A. and M.A from American University. She attended The International School of Brussels and is a graduate of The Hockaday School (Dallas, TX).

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About Schultz & Williams

Schultz & Williams is a strategic development, planning, multi-channel fundraising and marketing consulting firm serving our nation's nonprofits in areas such as healthcare, education, arts and culture, the environment, social justice and wildlife. S&W approaches its work with the conviction that every nonprofit's development, management and marketing strategies must be fully integrated for organizations to realize their greatest mission impact.

S&W has conducted campaign planning studies, developed campaign plans and/or implemented major campaign fundraising efforts during both private and public phases to help organizations reach campaign goals ranging from \$500,000 to \$500 million. In addition, our deep bench of experts has worked in organizations just like those we serve, providing each client with an informed and effective approach to planning, managing and implementing successful campaigns and programs that support the growth and advancement of their missions.

Established in 1987, S&W has partnered with more than 1,000 outstanding clients coast to coast and has more than 65 seasoned professionals and senior-level consultants covering the firm's full range of services.

Headquartered in Philadelphia, S&W also has operations in Washington, D.C., Los Angeles and San Francisco.