

# *Notes from the Field*



## *Building Stronger Nonprofit Organizations*

NO. 14 — WINTER 2006



The Jessie Ball duPont Fund invests  
in organizations and communities  
that were important  
to Mrs. duPont.

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Nonprofit Organizations*



# Dedication



*Jean Ludlow*

*Trustee*

*1985-2005*

*This issue of Notes from the Field  
is dedicated to Jean Ludlow,  
trustee emeritus of the Jessie Ball duPont Fund,  
whose love and support of nonprofit organizations  
knows no bounds.*

# Introduction

**A**S WE have watched the people and communities along the Gulf Coast in the weeks and months after Hurricanes Katrina and Rita, we have seen yet another vivid example of the important role nonprofit organizations play in our society.

Though government clearly bears a major responsibility for protecting its citizens, rebuilding infrastructure and assuring economic stability, the task of rebuilding lives and communities cannot be accomplished by government alone. Nonprofits are a vital and undeniable partner in this work.

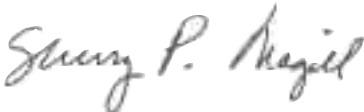
We need nonprofits. Not just in the post-Katrina Gulf Coast, but in Nebraska and Massachusetts and South Carolina and California. We need them to house the homeless, help the sick and infirm, shelter children, tend graciously to the aging and care about the least of us when most of us are too self-occupied.

We need our nonprofits to be strong and financially healthy. We need them to be in full voice, championing their cause, championing their clients and challenging each of us to pay attention.

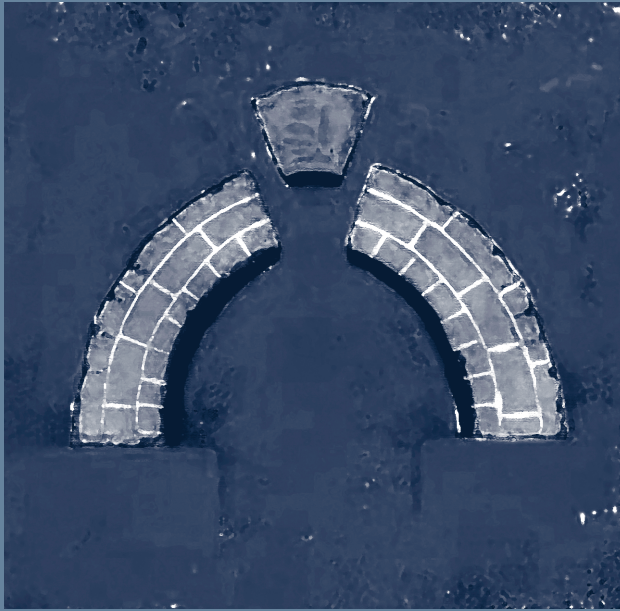
At the Jessie Ball duPont Fund, we are deeply invested in the nonprofit sector - almost half of the organizations we support are nonprofits outside of the realm of education. Their future is of great concern to us and we constantly search for ways to help them understand and meet the challenges they face.

The Jessie Ball duPont Fund Executive Institute is but one of the strategies we have employed to support and strengthen the nonprofit sector. It represents not only a significant financial investment by the Fund, but a major investment of time and energy from 67 of our eligible organizations. The lessons we have learned - and the lessons the organizations have learned - we hope will have value for others.

We are indebted to those who designed and managed the Institute, Virginia Hodgkinson and Kathy Kretman, to senior program officer Sally Douglass for her guidance, to all of those who took time to share their experiences, and to Mary Kress Littlepage for preparing this report.



Sherry Magill  
President



# The Jessie Ball duPont Fund Executive Institute

## A New Strategy for Strengthening Nonprofits

In the mid-1990s, Independent Sector published a ground-breaking report predicting the impact of federal budget cuts on America's nonprofit organizations.<sup>i</sup> Popularly called "The 100 Nonprofit Organizations Study," the report's authors calculated that changes in federal funding would have crippling effects on those nonprofits serving the nation's most vulnerable citizens, and that the unmet needs of children, the poor and the elderly would increase significantly as a result.

At the Jessie Ball duPont Fund, the report had a dramatic impact: "The 100 Organizations Study was a real turning point," said the Fund's President Sherry Magill, "because it gave us the first good look at what we were going to face."

Almost half of the organizations that the Fund supports are nonprofit organizations outside of the realm of education.<sup>ii</sup> Much of the Fund's work involves building the capacity of those organizations and supporting their work among vulnerable populations in a host of communities. Any threat to the health of those nonprofit organizations was clearly a threat to the heart of the Jessie Ball duPont Fund.

The Fund's trustees chose to respond to this threat by building upon their ongoing work strengthening the nonprofit sector, but doing so in a new and more strategic way.

By 1999, the Fund had contracted with Georgetown University's Center for Public and Nonprofit Leadership<sup>iii</sup> to design and deliver a customized education program to duPont Fund eligible nonprofits. Over the course of the next five years, 67 of the Fund's grantee organizations participated in the program, and in annual alumni gatherings. The Jessie Ball duPont Fund Executive Institute became a key component of the Fund's efforts to build a stronger nonprofit sector.

Today, these nonprofits face an array of challenges unimagined even in 1999. The disaster of the September 11 attacks on America, coupled with natural disasters such as Hurricane Katrina, and economic uncertainties have strained the limits of charitable giving. Continued reductions in funding for safety net programs, at the federal, state and local levels, have simultaneously increased demand for services and choked revenue streams of service providers.

But for many of these organizations, the Executive Institute experience has helped them navigate these changing waters in a new, more successful manner. In many cases, the changes have been small and simple, but significant. In a few cases, the changes have been more profound.

"My organization is healthier," said one participant<sup>iv</sup>, "[while] many institutions are lamenting the times. We're positioned to move better, and we have

a strategic plan. We are financially sound. We have improved our board and brought in new board members with specific skills. We had our best membership year last year, in bad economic times. We are doing better as a result of the Institute”

## Shifting Strategies

The Fund had been in the business of providing formal training and support to its nonprofit organizations since the early 1990s. “Trustee Jean Ludlow cared deeply about the nonprofit sector and was a great advocate for it,” said Magill. “In 1991, the trustees created the Nonprofit Initiative that was designed to address the specific needs of that group of eligible organizations.”

Initially, the Fund focused on the needs of the individuals leading the organizations. A series of programs, through the Wharton School at the University of Pennsylvania and, subsequently, the Center for Creative Leadership, offered leadership training to nonprofit executives. While the executives benefited from the experiences, their feedback helped the Fund see the shortcomings of its

strategy: the training was focused on the individual, not the organization, and the nonprofits’ challenges increasingly were organizational challenges.

At the same time, the Fund was acutely aware that the landscape beneath many nonprofits was shifting. Federal welfare programs were being altered dramatically, federal funding likewise was in enormous flux and the consequences of these policy shifts were not yet apparent to the general population. Though the 100 Organizations study had been

published, the audience that heard its warnings was extremely small. The Fund felt the need to build not only the capacity of individual organizations, but the collective capacity of the universe of organizations – the sector.

The Fund solicited proposals for a new approach to nonprofit training that would provide training for teams of individuals from each organization. Georgetown University’s Center for Public and Nonprofit Leadership responded with a program built around four key goals:

1. Increasing the organizational capacity and effectiveness of the organizations;
2. Enhancing the leadership capacities of board and staff;
3. Developing the concept of the organization as part of a larger nonprofit sector, with its obligations, responsibilities and contributions to society;
4. Building community and collaboration among the diverse participant organizations.



*The Institute’s team approach allows individuals from an organization to work together on a particular problem or project.*

“The match with Georgetown was particularly good,” said Magill, “because they were really scholars of the nonprofit sector. They were learning just as we were learning.”

To accomplish its goals, Virginia Hodgkinson, who at the time was director of the Center at Georgetown University, worked closely with the Fund’s staff to carefully structure the Institute.

Specifically:

- ❖ The Institute was a four-day residential experience, providing a dedicated block of time away and allowing the necessary space for team members to work together and the diverse organizations to build community.

- ❖ Each participating organization was required to send a team of three members - one board member (preferably the chair), the chief executive officer and a senior staff member. This allowed experiences to be carried back to the organization at all three levels.

- ❖ Each organization was required to bring a project - outlined in writing - that would be the focus of the team’s work during the Institute.

- ❖ The curriculum, while including some core components, was varied from session to session to reflect the needs of the participating organizations and the projects they brought to the Institute.

- ❖ Annual alumni meetings were scheduled to allow Institute participants to report back to their peers on their long-term progress, and to further build community - and a sense of sector - among the organizations.

Through this structure, the Institute and alumni meetings allowed each organization’s leadership team to come together around a problem, build relationships among peer organizations, and begin to see themselves as part of a larger whole. As they began to appreciate their role in the sector, they became empowered to develop a voice not only for their organization, but for the sector.

## The Learning Experience

The Institute curriculum, while varying somewhat from session to session, was designed to frame the thinking of participants in specific ways, said Kathy Postel Kretman, who was hired in 2001 to take over direction of the Institutes and succeeded Hodgkinson as director of the Center in 2003. “We wanted the participants to see themselves in a larger context, to think of themselves as part of multiple communities and networks: the network of the Fund’s eligible organizations, the network of their community,



*Kathy Postel Kretman, head of Georgetown University’s Center for Public and Nonprofit Leadership, is director of the Executive Institute.*

their state and the larger nonprofit sector. We wanted to build strong awareness at multiple levels.”

Core components of the curriculum included work in the areas of governance, strategic thinking and planning, building alliances and collaborations, fundraising, communications, and public policy and advocacy. Depending on the needs of the group, sessions might be added in volunteer management, or use of technology, for example.

The alumni gatherings, while an intentional part of the Institute design, proved to be a surprisingly strong component of the program.

Alumni gatherings were planned as a vehicle to build the larger community of duPont Fund eligible organizations – as more organizations participated in the Institute, the alumni gatherings would grow, introducing more organizations to one another. They also were seen as a vehicle for followup – Institute participants would report back to their peers about the successes or challenges they had experienced upon returning home from the Institute.

While alumni gatherings accomplished these goals, they also proved to be rich new learning opportunities for those who participated. As environments changed, and organizations met new challenges, the alumni gatherings proved to be places for problem solving, strategic re-evaluation and peer support. As Hodgkinson said, “alumni meetings solidified the importance of organizational progress.”

“Part of the power of the Institute was preparing these organizations for the inevitable changes they will have to face,” Kretman said. “Executive Director is a lonely place and the Institute provided a network, a support group. They liked the fact that the groups had diverse missions – they now have many new people they can call for ideas and expertise who see their organization from a fresh, new perspective.”



*Virginia Hodgkinson designed the original Executive Institute*

## Participation and Outcomes

Though all of the Fund’s nonprofit organizations were eligible to attend the Institute, interested organizations were required to apply. “We were not going to force organizations to go,” said Sally Douglass, the Fund’s senior program officer for nonprofit oversight. “They needed to express an interest.” Throughout the five years of the Institute (1999-2004), 67 nonprofit organizations participated, and key insights can be gained from studying the list of participants.

The Institute had the greatest participation from those organizations whose operating budgets were moderate to large, according to an analysis of those who participated.<sup>v</sup> Of eligible nonprofits with operating budgets of \$100,000 - \$1 million, 79 percent participated in the Institute. Of those with operating budgets between \$1 million and \$10 million, 66 percent participated.

Participation was lowest among the very large organizations – only 25 percent of those with operating budgets in excess of \$10 million – and the very small organizations – only 33 percent of those with operating budgets of \$100,000 or less.

Very large organizations, typically, have expanded opportunities for training, and have boards and staff who already have been exposed to advanced training. These organizations are more likely to have a strong sense of sector awareness, and perhaps already be engaged in some form of advocacy work. In fact, the two organizations that had the least positive experiences at the Institute were two large, national organizations with nationally recognized leadership.

Conversely, very small organizations may be unprepared to recognize or take advantage of training opportunities. Many rely heavily on volunteers and may have limited resources to support extended training at a remote location. Though the Fund supported the cost of the Institute itself, indirect costs, such as taking time off from work or finding substitute staff to cover for an extended absence, proved a barrier for smaller organizations.

The mid-sized cohort, however, has the wherewithal to support an investment in training and is well-positioned, in many cases, to take the step to the next level of performance that can result from an Institute experience.



*The faculty of the first Executive Institute found time to relax in the rural setting of Camp Weed, near Live Oak, Florida.*

It should be noted that the organizations that participated in the Institute had unique characteristics, just by virtue of being duPont Fund eligible organizations.

The Fund had provided access to training and professional development programs for almost a decade prior to the Institute. Undoubtedly, this increased the appreciation of organization leaders for the benefits of a program such as the Institute. These nonprofits also had had access to the Fund's support of a broad range of capacity building programs through the years.

Moreover, duPont Fund organizations are, by definition, older organizations - they were in existence prior to 1965, the cutoff date for eligibility established by Mrs. duPont in her will. These factors of size, prior experience and organizational maturity enabled the Institute to approach training at a higher level than might have been feasible with a different group of organizations.

To learn more about the benefits of the Institute, the Fund commissioned two formal evaluations: one, a qualitative evaluation that allowed Hodgkinson, as part of the Georgetown team, to conduct confidential interviews with participants, and one a quantitative analysis by Seedco, an independent evaluation firm based in New York, that drew largely on participant surveys and first-hand observation.

Among their findings:

- ❖ 9 out of 10 participants reported that their organizations were

healthier and more effective since attending the Institute.

- ❖ 90 percent of participants reported to have found new community with other duPont Fund eligible organizations.

- ❖ 74 percent reported a new understanding of their environment, and understanding of nonprofit trends increased significantly.

- ❖ 60 percent reported establishing new affiliations with professional and community organizations since the Institute.

- ❖ 42 percent reported being engaged in some new level of advocacy, from joining a coalition to creating a new coalition to becoming more active in existing organizations.

For the Georgetown team, however, the statistical results are only part of the story. According to the qualitative evaluation report<sup>vi</sup>, team members wanted to determine whether they “could provide an environment that was a microcosm of the independent sector, with its diversity and common issues. In other words, the unique composition of institutions [that are duPont Fund eligible] provided an opportunity to examine whether organizations could improve their leadership and management effectiveness and their impact through the realization that working as part of a larger sector was important to achieving societal goals.”

The evaluation also highlights several key lessons:

**BOARD PARTICIPATION:** “The requirement that one member of the team

had to be a board member cannot be overestimated as leading to the success of capacity building and organizational effectiveness.... The attendance of board members at the Institutes led to more engaged boards, better managed boards, and a better understanding of their organization’s goals, and more cooperation between boards and staff.”

**ALUMNI MEETINGS:** “The emphasis on building relationships among each of the [duPont Fund] institutional cohort and then joining the groups at alumni meetings has

truly established a community. Over time ... Fund participants will become influential leaders of the nonprofit sector in their communities and nationally. Several participants already are influential. The results of creating community within a sector could have a major impact on public policy at the local, state and national levels.”

**TRUST WITH FUNDER:** All of the participating organizations enjoy a permanent and inviolable relationship with a funder - the Jessie Ball duPont Fund - which can lead to a relationship of trust and mutuality often not found among



*Individuals from different organizations provide feedback and suggestions on each other's work during the Executive Institute.*

grantors and grantees. “The partnership of the duPont Fund in these Institutes (while behind the scenes) and followup after the Institutes were immeasurably important to the success of these organizations in carrying out their project and in building community.”

Kretman, the Center’s director, concurs with the evaluation’s findings and has incorporated the lessons into the next phase of work for the Institutes and for the Georgetown Center. The 2006 Institute alumni meeting will focus on public policy engagement, in response to the interest of the alumni and the successful work to date of some Institute participants. The Center, meanwhile, is designing an institute program for United Way of America, using many of the techniques that proved so effective with the duPont Fund organizations.

“The Institute experience has been extremely valuable on many levels,” said Kretman. “It has proven effective for the duPont Fund organizations. It has allowed the Center to develop a model that can benefit other organizations. And it also has informed our graduate program here at Georgetown, giving our students a better understanding of the role of nonprofits in public policy and the changing boundaries between sectors.”

For the Fund’s part, Magill feels the Institute has been a solid success, but cautions that it is just another step along the path toward strengthening the independent sector.

“The first phase of our work was at the individual level,” she said. “Then we moved to the organizational level. The challenge now is whether we can move from the organizational level to the community level.”



*Participants and faculty from the August 2001 Executive Institute pose for a class photograph.*

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<sup>i</sup>The Impact of Federal Budget Proposals Upon the Activities of Charitable Organizations and the People They Serve, 1996-2002, The 100 Nonprofit Organizations Study, with Thomas A. Pollak and Lester M. Salamon. Washington, D.C.: INDEPENDENT SECTOR, 1995.

<sup>ii</sup> Unlike most private foundations, the Jessie Ball duPont Fund supports a defined universe of organizations identified by Mrs. duPont in her will. Of the more than 350 eligible organizations, almost half - 152 - are nonprofits outside of the realm of education. The remainder are churches and religious organizations, independent primary and secondary schools, and colleges and universities.

<sup>iii</sup> The Center for Public and Nonprofit Leadership was, in 1999, called the Center for the Study of Voluntary Organizations and Service. Its name was changed in 2001.

<sup>iv</sup> *Building Community and Organizational Effectiveness: A Qualitative Evaluation of the Jessie Ball duPont Fund Executive Institute*, Virginia Hodgkinson, July 2005.

<sup>v</sup> Hodgkinson.

<sup>vi</sup> Hodgkinson.

**“Whether  
you believe  
you can or you can’t,  
you’re right.”**

*Ken Shepard  
Northumberland County  
Rescue Squad*



## The Stories

Jessie's Girls (and a Guy)

*Wilmington, Delaware*

*Page 13*

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Big Brothers Big Sisters of Northeast Florida

*Jacksonville, Florida*

*Page 19*

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Old Bedford Whaling Museum

(Old Dartmouth Historical Society)

*New Bedford, Massachusetts*

*Page 25*

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Northumberland County Rescue Squad

*Reedville, Virginia*

*Page 29*

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## IN THEIR OWN WORDS....

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*I have been in the library business for 40 years, and I am the daughter of a librarian. We like order and routine.*

*The Institute provided me with a good strategic planning tool that I used later to map out a communications and marketing plan for the library - a plan that the board felt comfortable with.*

*But the Institute's real value to me was the people, and especially the relationships that grow as I work with people over time through the alumni meetings.*

*The key for me is always talking with other people and getting out of my own trench. It's good to be forced to look at things differently.*

Susanna Collins  
Lancaster Community Library  
Kilmarnock, Virginia

# Jessie's Girls (and a Guy)

## Gaining a Sense of Sector in Wilmington

**B**ack in the 1990s, the original members of “Jessie’s Girls” met in one another’s backyards, pulling lawn chairs together, sipping wine, sharing war stories and offering advice. Theirs was more support group than collaborative network; their agenda more about survival than strategic change.

A decade or so later, convened in a private dining room at the University & Whist Club of Wilmington, they are a group to be reckoned with in the State of Delaware. They challenge – and change – state funding policies. They challenge – and change – private funding strategies. They are willing to tackle seemingly overwhelming tasks – such as the rising cost of health care.

They are, in many ways, poster children for collaboration and advocacy among community nonprofit leaders.

“Jessie’s Girls” – named for their common benefactor – is an informal network of executives and board members who lead some of the Jessie Ball duPont Fund’s eligible nonprofit organizations in Wilmington, Delaware. It was an all-female group until the recent arrival of George Krupanski, executive director of the Boys and Girls Club of Delaware.

The members all participated in the Jessie Ball duPont Fund Executive Institute at Georgetown University and its alumni functions. And the original “Jessie’s Girls” were graduates of an earlier nonprofit executive development program offered by the Fund.

“What the duPont Fund has done is bring us together and begin to give us strength and voice,” said Judy Govatos, executive director of the Delaware Academy of Medicine. “Others have criticized nonprofits for being too nice and speaking too softly. We are changing.”

It must be acknowledged that change in Delaware – a state of three counties and 805,000 residents – is perhaps more easily accomplished than in other larger, more populated states. The scale of politics and the breadth of networks simply are smaller in Delaware. “I can get the governor on the telephone,” said Krupanski.

But while a smaller playing field helps, it still requires hard work, courage and solidarity to challenge and change the status quo.

“Proximity and common interest are not enough,” said Helen Riley, executive director of St. Michael’s School and Nursery. “You must get to

know each other and trust each other.”

These relationships began in the mid-1990s, when Riley, Sandi Tuttle of Easter Seals Delaware and Maryland’s Eastern Shore, Margi Pruett of American Red Cross of the Delmarva Peninsula, and Patricia Hoge of the American Cancer Society, Mid-Atlantic Division, participated in the Fund-sponsored leadership development program led by the Center for Creative Leadership.

“The value of that early group was significant – we trusted one another.”

“When we first started as Jessie’s Girls,” said Riley, “we met in someone’s backyard over a glass of wine, and the conversation was about the day-to-day challenges and crises: how do I fire someone? What benefits do you provide to employees? How do you handle your budget?”

“But the value of that early group was significant – we trusted one another,” said Pruett. “I don’t know that I would have asked those questions if it had been people that I didn’t know.”

“Today,” said Riley, “the conversation is completely different. We’re not looking at the moment and hoping we can get from day to day. We’re more strategic, thinking longer term, and thinking about our community and our sector as much as about our individual organization.”

## Challenging State Funding Formulas

The State of Delaware, like many states, reimburses child care providers for all or part of the care they provide to children from qualifying low-income families. Prior to 2004, reimbursement rates had not increased for eight years, creating a growing financial strain for the nonprofits providing the care.

St. Michael’s, Boys & Girls Clubs and Easter Seals all are participants in the program and all had felt the pinch of continuing to provide care for children while costs were rising and reimbursement rates were flat. Together, they began writing letters and speaking with legislators about the need to increase rates.

In 2004, Riley testified before a joint finance committee of the Delaware General Assembly in support of a rate increase.

“St. Michael’s standing as a model care giver gave Helen credibility in the hearings,” said Susan Casscells, former chair of the St. Michael’s board. “When she said she could no longer accept clients with the reimbursement rate so low, it got the attention of the legislators.”

The 2004 General Assembly approved a rate increase for care of infants and toddlers age 2 and under and adopted a provision allowing providers to pass on some of the costs of child care to parents.

But the providers did not rest on this victory. As the 2005 General

Assembly session approached, providers again wrote letters and made calls, advocating for an across the board rate increase, which was granted during the session.

“The Executive Institute experience was critical in this informal campaign,” said Tuttle, “because it encouraged us to work together – formally and informally – and to be better business leaders. We learned to talk about economic impacts, and job creation and the cost of not doing something. We moved from a more passive to a more assertive posture.”

## Challenging Private Funding Priorities

As in many communities, United Way in Delaware is focusing more of its funding on specific areas of need rather than funding a broader array of nonprofit organizations. As United Way of Delaware developed its focus areas, some thought that the needs of the elderly were not adequately addressed. Sue Getman, executive director of The Wilmington Senior Center and a member of Jessie’s Girls, was among them.

The concern was particularly acute for Getman, since United Way traditionally had been a primary source of funds for the Senior Center. And that concern only deepened as she learned that other private funders in the community, among them the Delaware Community Foundation, might model their funding strategies after the United Way focus areas.

“We felt very strongly that this would be a disservice to the community and our older citizens, and that we needed to speak up,” said Getman.

In February 2005, Getman convened the Aging Network Collaboration – composed of 25 public and private organizations and agencies that serve seniors in Delaware. Together, they drafted “Meeting the Challenge: Helping Delaware’s Seniors Remain Independent,” a case statement in support of funding for a continuum of care for seniors, and presented it to the Delaware Community Foundation. The case was so compelling and the collaboration so strong that the Delaware Community Foundation decided to focus its program grants for the next two years on issues facing Delaware’s senior population.

“Many nonprofits don’t view themselves as a business,” said Getman. “They see themselves as ‘helping people’ and they are so used to having their hand out, they are not used to pushing back. And they aren’t encouraged to.

“The Executive Institute, however, is all about empowerment. You hear about what other organizations and people are doing, and it raises the bar of expectations. The Institute was the shot in the arm that we needed.”

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as a business...  
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## Tackling the Cost of Health Care

Though a late-comer to Jessie's Girls, George Krupanski joined the planning team for the spring 2005 Executive Institute alumni meeting, where he worked closely with Govatos of the Delaware Academy of Medicine. At about the same time, Krupanski became chairman of the Delaware Association of Nonprofit Agencies (DANA), the Wilmington-based nonprofit support group.

Govatos was keenly aware of the impact that rising insurance costs were having on nonprofit organizations, which, unlike for-profit entities, have few ways of raising prices and passing on increased costs to customers. She began to encourage Krupanski to have DANA address the issue.

"At first I thought it was unrealistic," Krupanski said. "The health insurance crisis is so large. What can we do about it? But then Judy started explaining strategies, options for risk sharing and other ideas and I began to see that there were things that we could do to make a difference. I would not have seen those opportunities without Judy's insistence."

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Krupanski also had learned the benefits of coalitions and had seen the ways in which duPont Fund eligibles had worked together, thanks to the Institute. He encouraged Govatos to make a presentation to DANA members about the impact of rising insurance costs on the nonprofit sector. She shared the experiences of her own organization, where health insurance issues were distracting her board and staff from the work they should be doing. She identified multiple cost-control efforts under way in various segments of the marketplace, all operating in silos, unconnected to one another. And she proposed a DANA-supported coalition, designed to coordinate existing efforts so they might have a greater impact.

As a result, DANA chose to make Addressing the Cost of Insurance one of its four principal study areas and one of the first two to be launched in 2005. Krupanski then drew together other duPont Fund eligible organizations to seek support from the Fund for initial research. "We believe building a coalition of agencies to develop a public policy agenda on this matter is the most effective way to address the need," he said.

"The Institute brings people together to share ideas," said Govatos. "You share and get ideas. You begin to think of things together. I do believe that nonprofit leaders are particularly isolated in their work and this type of collegial learning experience helps them to begin to think large. It's the synergy, the energy and the momentum that builds - all that inchoate stuff."

Regardless of the issue, Jessie's Girls - and Krupanski - acknowledge the power of the Institute experience in changing their thinking and actions.

"It's not just the content of the Institute," Krupanski said, "it's the process, the experience. The simple truth is, there is power in numbers. And there is power in trust - organizations that trust one another."

That trust and familiarity enables these nonprofit leaders to better see the whole rather than just the parts.

"We're not competitors any more," said Hoge of the Cancer Society. "We are beginning to understand what each organization really does and how we complement each other."

"It's a maturing of our organizations and our skill sets," said Pruett. "We can consider much more global issues now."

## IN THEIR OWN WORDS....

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*We use volunteers for everything from board and office work to landscaping, clearing trails, maintaining our garden and greenhouse and cleaning streams from a canoe. But before the Institute, we had maybe 25-30 volunteers and we were not focused on growing and developing that group.*

*Our major take-home from the Institute was valuing our volunteers, understanding their financial value, using them more effectively and thanking them more effectively.*

*After the Institute, we held volunteer appreciation events, developed a volunteer handbook and added volunteer information to our website. We wrote thank you notes. Now, we have more than 200 people signed up for our 2005 volunteer day.*

*Through the alumni meetings, there is a check-point to see if you are staying on course. You are not competing organizations; there is no reason not to share. The peer pressure is effective - it works!*

Bob Struble

*Brandywine Valley Association*

*West Chester, Pennsylvania*

# Big Brothers Big Sisters of Northeast Florida

## A Corporate Leader Finds His Way in the Nonprofit World

**F**or many nonprofit organizations, migrating to more business-like management practices is a difficult transition, as leaders try to balance the exactness of the business-world approach with the less precise, more mission-focused culture typical of the nonprofit world.

In similar ways, the shift from the business world to the nonprofit world can be difficult, particularly for organizational leaders who find they must adapt to different power structures and new decision-making cultures.

Such was the case for Warren Grymes, who, in January 2004, became chief executive officer of the struggling Big Brothers Big Sisters of Northeast Florida in Jacksonville. In his first 18 months on the job, Grymes confronted not only the task of re-engineering the organization, but of re-engineering his management thinking as well.

“There are natural ties between the way you run a business and the way you run a nonprofit - understanding that was affirming to me,” Grymes said. “But there also are some fundamental differences, and I had to understand those and then learn how to deal with them and my own natural tendencies. It was at the Institute that I first began to grapple with this, and realize how much more I needed to know.”

The difficulties for Big Brothers Big Sisters of Northeast Florida date back to 1990, when a chief executive with a 10-year tenure and strong leadership skills resigned. From 1990 to 2003, the organization struggled with the challenge of replacing that strong leader - between 1997 and 2003, the organization employed five different chief executives. During these unstable times, a decision was made to take over the operations of Big Brothers Big Sisters of Central Florida, based in Orlando. That decision would prove nearly fatal for the Jacksonville organization.

Shortly after assuming control of the Orlando operation, the Jacksonville office found itself defending several molestation cases, two of

“There are natural ties between the way you run a business and the way you run a nonprofit... but there are also some fundamental differences.”

which occurred in Orlando. The litigation unnerved funders and stressed the board of directors, who often were operating the agency in the absence of a chief executive. Then, in 2003, the organization lost its liability insurance and representatives from the national Big Brother Big Sisters organization were dispatched to Jacksonville to close down the agency unless new insurance could be written.

The board, however, was divided. Some members were ready to abandon the organization. Others were determined to keep it going. Using business connections, one board member found a willing insurance carrier (though at 10 times the cost) and the board confronted a decision: the vote was 7-6 to keep the agency open. Dissenting board members resigned and the board faced an extremely tight timetable to recruit a new chief executive and salvage the organization. It was the fourth quarter of 2003.

After growing up in Jacksonville, Grymes enjoyed a successful career in sales and marketing with Delta Airlines regional operations, then successfully managed a travel agency, taking it from a local to a state-wide enterprise. He was lured away from the corporate world by a

**True to his entrepreneurial background, Grymes arrived at Big Brothers Big Sisters with a “fix-it” attitude. He plunged in and addressed operational issues with vigor.**

friend’s political ambitions. But by the second quarter of 2003, his friend’s candidacy had been unsuccessful and

Grymes was contemplating how to spend what he called “the third trimester” of his working life.

Networks and coincidence brought Grymes and

Big Brothers Big Sisters together and, after carefully examining one another, the two agreed to terms in December 2003. Grymes, with a businessman’s keen eye, could see unrealized opportunities for the organization. And he knew that, with his extensive network of friends in Jacksonville, he could access the external resources he needed to shore up the nonprofit.

After taking the CEO job in January 2004, one of

Grymes’ first meetings was with representatives of the

Jessie Ball duPont Fund. The Fund’s officers had learned of the organization’s perilous status through the grapevine and were distressed that agency representatives had not been up front about the situation. “I assured them that we would do everything humanly possible going forward to put the organization on a solid footing and maintain good communications in the process,” Grymes said. “So, when I was invited to attend the Jessie Ball duPont Fund Executive Institute, of course I accepted.”

But it was without enthusiasm.

“I hate going to seminars. I’m a sales and marketing guy, so it’s hard to get me to sit still.” Moreover, Grymes said, “I was working 60-70 hours a week. I was wearing multiple hats. I was trying to bring the organization into compliance with state and national standards. But, I felt I had made a strong commitment to the Fund to get our act together.”

In the spring of 2004, Grymes arrived at Georgetown University for the Institute, where there were some surprising lessons in store for him.

“One was understanding what the term ‘nonprofit’ really meant, from a financial perspective,” he said. “I had served on about 20 nonprofit boards but I always had an understanding that ‘nonprofit’ meant ending the year with a balanced budget. And I always wondered how that was accomplished – how you anticipated revenues and expenses and prepared for the unexpected and ended the year in balance. Then I learned you *can* make a profit, you just must reinvest it in the organization – you can have reserves. That was a surprise.”

Grymes also had to come to grips with a different governance structure. “I had never reported to a board before.” Over the course of the next year, it was the board – determining its makeup and fully understanding its role – that proved to be one of the greatest challenges for Grymes. He struggled to gain his own personal understanding of the role and function of a board, its relationship to the organization and its relationship to the work that he was doing.

True to his entrepreneurial background, Grymes arrived at Big Brothers Big Sisters with a “fix-it” attitude. He plunged in and addressed operational issues with vigor. And he reached out to his friends to fill board vacancies and quickly rebuild credibility for the organization. But the board, in his mind, was largely window dressing.

“I started out thinking that I didn’t need the board,” he said. “In many ways, I just wanted the board to go away. And in many ways, the board did – they were exhausted [after the turmoil of the previous year]. I just needed the board to buy into a few special events and bring people to them and do a little advocacy in the community.”

In the course of some work with other executives from Big Brothers Big Sisters, Grymes was asked to analyze what percentage of his time he spent on various tasks. He indicated he spent 15 percent of his time on fundraising, 5 percent on the board and 10 percent on each of eight other tasks. He was surprised to hear one of his colleagues say she spent 80

**“I had served on about 20 nonprofit boards but I always had an understanding that ‘nonprofit’ meant ending the year with a balanced budget. And I always wondered how that was accomplished.”**

percent of her time on board and fundraising activities. He began to wrestle with his fundamental understanding of a board. "I asked myself: What does this board represent? They represent engagement. They represent power. But it must be more than that. What does it really represent?"

At the Georgetown Institute, Grymes and his management team worked aggressively on board development. "The work was helpful in that it codified in my mind where I needed to go," Grymes said. But he still had many questions - enough that he knew he needed to learn more. He applied for and was accepted into the university's Nonprofit Management Executive Certificate Program.

"I thought the transition and learning would be a simple process," Grymes said. "It ended up being a much longer process."

**"We want board members who get it. And we have high expectations of them. We expect attendance. We expect face time. We expect financial support."**

After more than a year of work, reflection and study, Grymes feels he has a solid perspective on the role of the board and a challenging strategy for recruiting new board members.

"I now see the board as 15-22 additional fundraising people," he said. "They are salesmen for human and financial resources for the organization. And the missing component that I was searching for - it's passion."

"I had a football coach who said: Faith is No. 1, Family is No. 2 and Football is No. 3. I now understand that an effective board member - the board members I need - are those who have Big Brothers Big Sisters in the top 4-5 priorities of their life. We have gone beyond going out, hat in hand, and asking people to be on our board. We now are looking for people who WANT to be on our board."

Grymes described a conversation with a community leader who had been asked whether he might be interested in a board position. "We sat down and [the businessman] said 'Tell me a little bit about your organization.' I told him 'I'll be happy to tell you about my organization, but first I want to ask you some questions to see if you might be a fit for our organization.' He looked at me kind of funny. He chose not to join."

"We want board members who get it. And we have high expectations of them. We expect attendance. We expect face time. We expect financial support. And we expect the more experienced board members to nurture and bring along the younger ones. We're not afraid to say what we expect - and to demand it."

“The biggest issue - the greatest challenge - is getting boards to ‘get it’ - to understand with seriousness their roles and responsibilities. And that is a sector-wide challenge.”

In less than two years, Grymes’ understanding of and appreciation for the challenges of the nonprofit have grown many-fold. And he has been intrigued with the number of corporate expatriates who are interested in working in the sector.

“I am surprised to see how many men and women my age, who have been successful in the corporate world, are looking to do something different in their working life.”

But he fully understands the attraction: “This,” Grymes says without hesitation, “is my favorite job ever.”

## IN THEIR OWN WORDS....

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*When I joined the Historical Society of Delaware, I quickly realized that before we could do any strategic organizational work, we needed to build a team with the staff and the board. The Institute helped me identify the components of that work - developing mission and vision and values and common language, as well as building the self-confidence to overcome the fear of what the “outside world” might say about us.*

*As much as we needed to build trust within the organization, I needed to manage the organization in the interim, as this new culture grew.*

*This has been challenging work, and the lessons of the Institute and my relationships with peers here in Wilmington have been critical in working through this period.*

Joan Hoge  
*Historical Society of Delaware  
Wilmington, Delaware*

# New Bedford Whaling Museum (Old Dartmouth Historical Society)

## Growing the Person, and the People

**A**nne Brengle is a student of management and leadership. She has studied at Harvard University, Boston University, the University of Colorado and the Getty Leadership Institute. So it is no surprise that she was on site in Live Oak, Florida, in August 2000 for the inaugural class of the Jessie Ball duPont Fund Executive Institute.

Five years earlier, she had attended another Fund-sponsored training program under the direction of the Center for Creative Leadership. Today she counts that experience, and the Executive Institute experience, as among the most significant of her career.

“The lessons I learned at both of those training programs are an invaluable piece of what I do every day,” she said.

Brengle is president of the New Bedford Whaling Museum, a century-old institution established by the Old Dartmouth Historical Society in the blue-collar community of New Bedford, Massachusetts, which was the center of the global whaling industry through much of the 1800s. The museum’s mission is to “Educate and interest all the public in the historical interaction of humans and whales worldwide and in regional and maritime history.”

In her 10-plus years at the helm of the museum, she has experienced great successes and deep challenges. Capital campaigns have been successful beyond expectations, and fundraising has suffered in the aftermath of the events of September 11, 2001. Some opportunities for expansion have evaporated and some have materialized. But through these ups and downs, Brengle has maintained a constant focus on the people who lead the museum – her staff and the members of the board.

“I am very interested in how we handle the human side of the operation – structure, management and leadership,” she said.

When she arrived in 1994, the museum had an annual budget of \$750,000 and was losing about \$150,000 a year, she said. And, there were significant staff challenges. A climate survey revealed Museum employees were frustrated and discouraged, and in need of a more “Can-Do” attitude.

During her first year at the Museum, Brengle attended the Fund-sponsored leadership training program directed by the Center for Creative Leadership, which proved to be a major turning point for her.

“The Center for Creative Leadership was all about self-knowledge – learning my strengths and weaknesses,” she said. “It was a great revelation to me that I did not have to be all things to all people; that I could play to my strengths and hire to my weaknesses.”

Soon after, Brengle hired a deputy director to handle the museum’s educational programs. And she began work in earnest on building a “team spirit” among the staff; going so far as to incorporate the movie “Sister Act,” in which Whoopie Goldberg inspires a group of nuns to work together and accomplish great things, into staff meetings.

“It’s hard to walk the walk of being strategic during tough economic times.”

By 2000, Brengle had assembled a strong leadership team at the Museum, and the organization had experienced some resounding successes. A \$10 million capital campaign – the largest in the museum’s history – was poised to exceed its goal by more than \$2 million.

Facilities had been renovated, new programs introduced and community outreach was growing.

“We were about to turn the corner,” Brengle said. “I could see what was needed.”

In August, she attended the Executive Institute, accompanied by her board chair and her vice president for finance and armed with a project that focused on helping the museum address strategic challenges in its marketplace.

“The Institute really helped me figure out two things,” Brengle said. “It helped me figure out how to put together a team, and how to relate to the board.”

The involvement of her board chair, Robert Austin, in the Institute proved critical. A former senior executive with a Fortune 500 company, he was enthusiastic about attending the Institute, and he was savvy about the organization’s team-building needs.

“He understood the challenge,” Brengle said, “and he shared with me the interest in the science of leadership and management.”

He also played a critical role in taking home the lessons of the Institute.

“One of the big takeaways was that the board needed to be less in the crankcase and more strategic,” Brengle said. “I didn’t have to carry that message back to the board – he did it for me. And the board understood. Their attitude was, ‘Let’s not just throw people at the problem. Let’s try to use the right people in a strategic and effective way.’ ”

Of course, all of these events occurred before the terrorist attacks of September 11, 2001. In the post-9/11 world, the museum, like scores of other nonprofits, faced new financial challenges. Compounding those challenges in late 2001, the Museum was given a massive, 70,000-item

collection of whaling artifacts by another whaling museum that chose to close its doors. The collection, while a magnificent complement to the New Bedford museum's, was so large as to dramatically impact operating costs and double the museum's workload.

By 2004, the museum's finances were showing strain and the first revenue shortfall was detected. Brengle and her team chose to be proactive and develop a retrenchment plan that included pay cuts and staff reductions but careful maintenance of educational programs.

Again, the lessons from her training came into play.

"It's hard to walk the walk of being strategic during tough economic times," Brengle said. "If I have learned anything, it is that there is not one nirvana. You must balance between the times when you have the luxury of being strategic and the times when you need your board to look at operations with you and help you figure out the nuts and bolts. You need to be a bit of a cowboy and live between the two places."

It was a message that she shared with her friends from the Institute when they gathered in spring 2005 for an alumni meeting.

"The alumni group has been very helpful," she said. "I developed relationships with a core group at the Center for Creative Leadership and we've continued to stay in touch. We share advice and commiserate with each other and watch our successes and struggles."

At the 2005 alumni meeting, Brengle made a formal presentation to her colleagues, candidly tracking her organization's struggles, the plan for retrenchment and the lessons learned. She received rave reviews.

"The diversity of nonprofits [at the Institute] is important," she said. "It isn't all museums. It's apples and oranges. But there are common thematic issues of management and leadership and we can learn from one another."

Today, the museum is living out its retrenchment plan and growing stronger. A new capital campaign, designed to raise \$23 million by 2012, had raised \$8 million by late 2005. The new collection has been absorbed and Brengle believes they are on the verge of another growth spurt.

"Now we need to strut our stuff. We are not building a new building, but we need to step into our shoe size."

## IN THEIR OWN WORDS . . .

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*I spent much of my working life in the for-profit world and I admit I came to the Institute a bit skeptical - I have been exposed to a lot of training. But there are major differences in the for-profit and nonprofit worlds, and one of the big ones is the presence of a volunteer workforce.*

*In the for-profit world, I oversaw production and delivery of newspapers. One evening, as the press run was winding down and the newspapers were being loaded onto trucks at the loading dock, the weather suddenly turned violent, tornado warnings went off, things got pretty bad. I was determined to get those trucks loaded and out of there before that storm hit. I looked at those fellows on the loading dock and hollered, 'Suck it up, boys! Let's get this job done!'*

*You can't do that with volunteers. In the for-profit world, the rewards are money. With volunteers, you have to enrich their lives.*

*What I brought with me from the for-profit world that has helped most in the nonprofit world is not my management skills, but my negotiating skills.*

*The Institute helped me realize that not all business applications are relevant and transferable to the nonprofit world. It enabled me to look at the tools I have and find ways to use them in a new setting.*

**Kate Hanely**

*American Red Cross - River Counties Chapter  
White Stone, Virginia*

# Northumberland County Rescue Squad

## Growing an All-Volunteer Organization

**T**he Northern Neck of Virginia is a rapidly growing region, and yet it remains largely rural and remote. Bounded by the Potomac and Rappahannock rivers and the Chesapeake Bay, the peninsula includes miles and miles of coastline, dotted with hundreds of waterfront homes and farms at the end of twisting two-lane roads. Newcomers – most often retirees or those mature enough in their careers to afford second homes – are attracted to the area’s quiet, slow pace and incredible natural beauty.

This landscape, with its coves and creeks and inlets and meandering country roads, is anything but placid when seen through the eyes of an emergency medical technician. To those eyes, it is a landscape seeded for tragedy: a growing population of older residents living individually in remote homesteads down unlighted country roads, at least 70 miles away from the nearest trauma center.

The Northumberland County Rescue Squad, which serves just a portion of the Northern Neck, makes 400 emergency runs a year. Squad members are proud of what they do, and particularly proud that they provide their services for free, unlike many of their neighboring squads, which have been forced to charge residents for rescue services. “I have a philosophical problem with charging for an emergency rescue call,” said Ken Shepard of the Northumberland Squad. “The fire department doesn’t charge you. The police don’t charge you. I don’t think the rescue squad should charge you.”

In 2003, the Squad’s major challenge was not money, it was manpower. The Squad had 21 members. Each call requires at least three individuals: two trained medical technicians and a driver. The minimum required emergency medical training exceeds 150 hours. And there is no pay – Northumberland is an all-volunteer rescue squad.

The Squad needed to recruit and train more volunteers, preferably retirees who could answer a call at any time of the day or night. But in an all-volunteer organization, meeting strategic needs – creating time for reflection, finding the necessary expertise, and developing and implementing

**This landscape, with its coves and creeks and inlets and meandering country roads, is anything but placid when seen through the eyes of an emergency medical technician.**

a plan - is particularly challenging. Who does that work, when you are answering 400 emergency calls a year?

“Even though the Georgetown instructors didn’t know anything about emergency medical services, they asked challenging questions that made us look at our problem from a new perspective.”

Shepard and his colleagues needed more than mere tactical advice.

They also needed the self-confidence to believe they could solve their problem and the encouragement to try.

The Jessie Ball duPont Fund Executive Institute at Georgetown University provided the expertise and discipline. And, according to Shepard, his peers at the Institute helped build the Squad’s self-confidence and provided the much-needed encouragement.

“Taking time away at the Institute forced us to devote our waking hours, for three days, to solving a problem,” said Shepard. “Outside of the Institute, it never would have happened. We’re all volunteers. And even though the Georgetown instructors didn’t know anything about emergency [medical] services, they asked challenging questions that made us look at our problem from a new perspective.”

The practical advice led to a simple “marketing plan” to recruit volunteers, built around a clear, five-point message:

*Your family, friends and neighbors need you!*

*We will train you.*

*We will guide you.*

*You will not be alone!*

*You can do this!*

Included in the plan were clear recruiting goals: five new members per year with at least three of those going on to become certified in emergency medical services.

“This wasn’t anything complicated,” said Shepard. “This wasn’t rocket science. We asked for volunteers in our fundraising letter, and we spoke before the county Board of Supervisors, and the media picked it up.”

The result: the Squad vastly exceeded its goals. By mid 2005 there were 14 new volunteers and eight were certified Emergency Medical Technicians.

“We just needed time and guidance to work on a plan - and we needed to realize it was something we could do. And we did it,” said Shepard.

Squad members have shared their success with other squads in the county. They also have begun to look to the future. With increased volunteers, the Northumberland Squad can begin to think about opening another station in the county.

“Whether you believe you can or you can’t, you’re right,” Shepard said, “We gained a lot of confidence through our peers at the Institute. Now we believe we can.”

***Credits:***

Content: Mary Kress Littlepage, KBT & Associates, Jacksonville, Florida  
Photographs: Laird, Jacksonville, Florida and Georgetown University  
Design: Glenn Ivie Advertising, Art & Design - Jacksonville, Florida  
Printing: The Hartley Press, Inc.



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