



eNews | Nonprofit Quarterly | Spring/Summer 2015

Dear Friends and Colleagues,

You can tell things are picking up when people start to talk about endowments once more. But I urge you to think again.



Recent events demonstrate my point. You may have heard that Sweet Briar Women's College in Virginia is closing its doors after 114 years. Though the college had a \$90 million endowment, the school's Board of Directors cited "insurmountable financial challenges," because less than a quarter of the endowment coffers were available for daily operations. Court challenges make Sweet Briar's fate ambiguous, but the situation holds a good lesson for all of us.

With a robust US economy, record stock market highs and a relatively positive philanthropic future view, you may consider this a prime opportunity to pursue endowment funding.

**I recommend a different approach.** Take advantage of these positive times to shore up your operational reserves. Without them, a hefty endowment is irrelevant *if and when* the outlook becomes bleak. And, strong operational reserves position you well to establish an endowment when the time is right. In this highly competitive climate, savvy donors want organizations with a solid promise for the future, including sufficient reserves.

MW&A successfully procured the following grant awards between December 2014 and May 2015.

**The Center OC:**

**\$75,000** Annenberg Foundation

**Central Pennsylvania**

**Youth Ballet:**

**\$25,000** Stabler Foundation

**Caterina's Club:**

**\$118,000** Fresh Produce and Floral Council

**\$10,000** Sister of St. Joseph Foundation

**\$15,000** LI Green Foundation

**\$5,000** Pacific Life Foundation

**\$5,000** O.L. Halsell Foundation

**Ask yourself these questions.** "Does your organization meet the 'best picture' financial health requirements to be a qualified candidate for endowment funding? Do you have strong Board giving, two years of operating capital, flawless audited financials?"

If the answer is no, it is time to change directions and get your financial house in order.

Consider working with us on a [Development Assessment](#) to assess your organization's contributed revenue financial health. By implementing new tactics and strategies, we have successfully helped many clients increase the overall rate of return from their time and financial investments.

My advice is to direct your resources now toward building a crisis diverting operational reserve *before* you test the waters for future endowment funding. This will help ensure smooth sailing through an unexpected economic storm.

Warmest regards,



## New Executive Placements

### *Successful searches from coast to coast: Orange County United Way in California and Saratoga Performing Arts Center in New York!*

A 10-year strategic plan, entitled FACE 2024, is up and running at the **Orange County United Way** under the direction of President and CEO Max Gardner. FACE 2024, an acronym for Fund, Advocate, Collaborate and Educate, engages regional nonprofits to work toward common goals. Its implementation brought unique challenges to Gardner's staff. He turned to MW&A.

"We needed a pro, so we went with a pro," said Gardner, explaining why he chose [MW&A](#) to help fill the newly created position of Vice President of Investor Relations. "Many firms claim an understanding of nonprofit management, but I found they have a superficial level of expertise. I needed someone proactive to identify skills matching our operations, someone

**\$5,000** Leo Buscaglia Foundation

***Festival Ballet Theatre:***  
**\$7,500** Leo Buscaglia Foundation

### [Over 20 Years of Successful Client Partnerships](#)

**TEEN LINE:**  
Development Assessment and Executive Search: Executive Director

**Lipstick Angels:**  
Foundation Relations and Grants Development

**Matthew Silverman Memorial Foundation:**  
Foundation Relations and Grants Development

**Project Hope Alliance:**  
Development Assessment and Planning

**Providence High School:**  
Institutional Giving Assessment and Foundation Relations

**Plasticos Foundation:**  
Executive Director Search

MW&A successfully completed the following executive search:

**TEEN LINE at Cedars Sinai** (Los Angeles, CA)  
Executive Director:  
Michelle Carlson  
Former Director of

to approach the right people."

"Michelle sets high standards. Her sole interest is to get the right person for the job. She analyzes each candidate's skill set, qualifications and personality. Careful with your time, she acts as a filter to present only those candidates who are worth meeting."

Gardner and MW&A's collaboration hit the mark with the hiring of Lori Burrill who is responsible for individual giving and major gifts and loves the challenges her new job brings.

"I was immediately impressed with Max and the senior team and knew this was a good fit," said Burrill. "They provided the strategic vision and the support to move forward."

Burrill expressed her appreciation to MW&A for this opportunity. "Michelle's openness was a real plus," said Burrill. "She always provided honest assessments. And Megan was awesome, incredibly efficient."

The match now made, the OC United Way can FACE the future with increased confidence and optimism.



Max Gardner, President & CEO  
Orange County United Way



Lori Burrill, Vice President of  
Investor Relations

Across the country, another search was underway for the **Saratoga Performing Arts Center (SPAC)**, one of the nation's most prestigious performance venues and the summer residence of the New York City Ballet and the Philadelphia Orchestra.

MW&A was looking to fill the new position of Chief Marketing and Corporate Development Officer for SPAC. Tracy Strann, former Director of External Affairs at the Grammy Museum in Los Angeles, got the call.

"I have truly landed in an ideal place," said Strann. "I live in a

Marketing and Community  
Program, The Bella Vita  
Clinic

The Request for Proposal (RFP) has been a common practice for nonprofit organizations for decades, but its usefulness is dying away. We think it is time to make some changes and say goodbye to the RFP.

We aren't alone. A few cases in point:

*A large government funded nonprofit recently spent two months developing an RFP to find a development firm to assist them in diversifying their funding. After an effort of great magnitude and significant time investment, zero responses were received.*

*A SoCal school district issued an RFP for nonprofit programs to bid on after-school programming--only one organization showed up to the bidder conference.*

RFPs require immense resources, for both parties, resulting in stacks of papers with broad descriptions and few specifics.

A better answer - the personal approach. Forward-looking smaller and mid-size consulting practices are now passing on the cumbersome RFP

charming community and work at one of the country's premiere performing arts centers."

Now part of SPAC's ensemble team, Strann's duties primarily encompass advertising, promotion, sponsorship and corporate funding. She is ever grateful to MW&A.

"Michelle and Megan contributed a tremendous amount of advice to showcase my talents," Strann said. "They had my best interest at heart as well as those of SPAC, making sure it was a win-win for both sides."

Marcia White, SPAC President and Executive Director, who initiated the search, felt the same. "The first time I spoke to Tracy, I knew she was the one."

"We had never done a search like this before, but this position was a challenge, requiring someone with proven skills in both marketing and corporate giving," White explained. "Michelle is a no nonsense woman with great resources and an instinctive sense. Her extensive performing arts background was an incredible plus."

"Michelle understands our business. She is very careful about the candidates she brings to the table," said White. "She listens and works incredibly hard. And, I knew I could trust her."

As SPAC celebrates its Golden Anniversary next year, White and Strann can both look to the future with great promise.

*Learn more about Orange County United Way's FACE 2024 at <http://www.unitedwayoc.org>*

*Details on SPAC and upcoming events are available at <http://www.spac.org>*

process. Boutique firms like MW&A find it far better to meet face to face with potential clients and present scopes of work that gauge and address an organization's real needs.

So how can you replace the RFP when help is warranted? Reach out to your associates. Find organizations doing things right and determine how they got there. Did they have help along the way? If so, to whom did they turn? Research the Internet, inquire to professional associations and don't be afraid to contact your funders. People are more than willing to share their successes. The gems will come to the surface.

Then sit down and talk, face to face, with the people who will work directly with you, not the junior staffer who was assigned to the RFP. Ask for a customized plan highlighting their expertise as it pertains to your needs. This approach clarifies expectations and strengthens the relationship from the beginning.

Your next step - put that RFP template in your archived files and let it become a business practice of the past.



*Tracy Strann  
Chief Marketing and  
Corporate Development  
Officer at SPAC*



*Marcia White, Executive Director  
SPAC*

**Editor Carol van Ahlers**

MW&A welcomes Carol van Ahlers to our newsletter team for the Spring/Summer issue. Over the years her career progressed from sports writer to communications officer for municipal governments and nonprofit organizations, as well as owning her own public relations firm.

**Michelle Whiting & Associates**  
[michelle@michellewhitingandassociates.com](mailto:michelle@michellewhitingandassociates.com)  
[www.michellewhitingandassociates.com](http://www.michellewhitingandassociates.com)  
562.437.3561