



PHILLIPS OPPENHEIM
PROVIDING EXCELLENCE IN RECRUITING NONPROFIT LEADERSHIP

CURRENTS

To Our Clients and Friends,

With this issue of Currents, we will begin highlighting "Success Stories...Leadership that Lasts." In our work, we have seen first-hand the difference that strong, creative leaders can make – over time – in the success, stability and growth of an organization. It is often that critical leadership component that enables organizations to weather difficult times, regroup, and flourish in the future. Our interviews with Phillips Oppenheim recruits Ray Offenheiser, President of Oxfam America and Pat Schroeder, until recently the President and CEO of the Association of American Publishers, highlight such leaders.

We also wanted to bring you up-to-date on our recent searches and to introduce you to the newest member of the Phillips Oppenheim team, Susan Gluck.

Our focus will continue to be on helping nonprofits chart a path to long-term success – regardless of the economic environment.

Recent Searches

The Atlantic Philanthropies - Communications Executive

Alzheimer's Drug Discovery Foundation - Executive Vice President

The Children's Aid Society - President and CEO

Cooper-Hewitt, National Design Museum - Director

Crystal Bridges Museum of American Art - Director

The LGBT Community Center - Executive Director

Museum of American Finance - President and CEO

National Family Planning and Reproductive Health Association - President and CEO

National Park Foundation - President and CEO

The New York Institute for Special Education
Cornerstone Literacy Initiative - Executive Director

Pennsylvania Horticultural Society - President

Philadelphia Orchestra Association - President and CEO

Seattle Art Museum - Director

Seventh Regiment Armory Conservancy - CFO

Taubman Museum of Art - Director

Around Phillips Oppenheim

We are happy to welcome **SUSAN GLUCK** as the newest member of the Phillips Oppenheim team. Susan Gluck has enjoyed a multi-faceted career path, where she has worked in both the corporate and nonprofit sectors. Before joining Phillips Oppenheim as a search consultant, Susan co-founded Sage Baby, a leading Internet retailer of environmentally-friendly baby products. Prior to this, Susan was: senior executive at IBM, where she was the General Manager of IBM's Multimedia



Studio; the Marketing Director overseeing IBM's global licensing programs and a member of the Corporate Marketing Strategy team; and the Vice President of Marketing Management for IBM's largest division, IBM Global Services. Earlier in her corporate career, Susan co-founded a new media group at Time Warner and was an account manager at the advertising firm Young & Rubicam.

Susan began her career dancing with the New York City Ballet, joining the company at 17 as its then youngest member. She danced for eight years under the leadership of George Balanchine, Jerome Robbins and Peter Martins, performing numerous soloist and principal roles.

Susan received her BA from Harvard College and an MBA from the Wharton School of Business at the University of Pennsylvania. Susan currently serves on the Board of Directors of the George Balanchine Foundation and on the Corporate Advisory Board of the Interlochen Arts Academy. She is also a member of the Sustainability Committee at Riverdale Country School.

DEBRA OPPENHEIM recently served as a panelist, along with other recruiters, for *100 Women in Hedge Funds* with the topic, "Navigating the Conversation with Executive Recruiters." The organization is helping its members focus on ways to manage, cope with, and dream about careers in these uncertain times. Discussed were: perspectives on developing and maintaining relationships with recruiters; approaches to finding new opportunities in a changing environment; and recommendations for seasoned professionals to market themselves through transition to new jobs and, perhaps, new industries.

PAUL SPIVEY was appointed to the Board of *Hispanics in Philanthropy (HIP)*. HIP works to forge strong partnerships between organized philanthropy and Latino communities in the United States and abroad. HIP equips funders with the knowledge and tools to support Latino communities. The organization also sponsors: regional, national and international conferences; research publications; and professional development programs.

→ Nonprofit Leaders

Success Stories...Leadership that Lasts.

Recruited by Phillips Oppenheim

Raymond C. Offenheiser, President of Oxfam America

Ray Offenheiser has spent his entire career in the nonprofit sector and is a recognized leader on issues such as ending global poverty, human rights, and foreign assistance. Since joining Oxfam America in 1995, he has helped it grow dramatically in size, staff, and scope. Under his leadership, it has also gained a global reputation for its expertise in international development and trade. Prior to assuming his position at Oxfam, Offenheiser served as the Ford Foundation Representative in Bangladesh, India, and South America. He has also directed programs for the Inter-American Foundation and worked for Save the Children.



What do you see as your major accomplishments at Oxfam America?

As the leader of one of its founding affiliates, I've contributed to the creation of the Oxfam International confederation, which has become a leading brand in the global marketing of humanitarian support and international development. In America, I led the building of the Oxfam brand and positioned the organization as an influential voice on U.S. foreign and development policy.

Over the last 12 or 13 years, Oxfam America grew from a \$12 million to a \$75 million organization, increased the staff fourfold, launched its first major capital campaign, and developed a process for board development. We've redesigned Oxfam America's business model to reflect a 21st-century vision of social change at the international and domestic levels. This involved a sharper focus on public policy, public-issue campaigning, mass communication, outreach, and public education around international development issues.

What strategies have proven most effective for you?

In the program area, I've tried to introduce a theory of change so that we think strategically about where we can add value in the not-for-profit universe.

Where can we really make a difference, and what does that mean in terms of how we reorganize internally, reallocate resources, and redesign our business model? I've focused on building competencies in new areas: humanitarian

relief, public policy, public outreach, and engaging private sector corporations at senior levels. These new skill sets have been transformative. I also directed resources to build systems for fundraising, financial management, and IT needed to support organizational growth.

Where has your leadership resulted in the greatest positive change?

Probably in helping build the Oxfam brand in the U. S. and raise its profile as an influential, authoritative, innovative organization that merits support from both individuals and institutional funders. With a stronger public profile, we've been able to punch above our weight, increase our revenues by a factor of five, and do much more than we could have imagined.

Under my tenure, Oxfam America has adopted a business model that's driven by an "earned" media approach to brand development and public presence as opposed to a "paid" media approach. That is unusual for a not-for-profit. We didn't have money to buy full-page advertisements. Our goal was to get onto the editorial and first pages of the *Times* and *The Wall Street Journal* with the quality of our ideas about critical issues in our field. Our program work speaks for us rather than our marketing identity.

This is viewed as a risky strategy: not-for-profits don't want potential donors to view them as being too political. We wanted to be perceived as pursuing serious issues for the importance of the change that could be achieved, not for publicity.

What advice do you have for someone taking a CEO position in a nonprofit?

I would advise them, first of all, to evaluate quickly the caliber of their middle management ranks – their skill set, enthusiasm for their organization's mission, and ability to deliver on that mission. I'd also look at how people are inducted into the organization. Does it really imprint its mission on its staff and managers?

In this difficult economic climate, I'd advise them to carefully evaluate their financial management. Not-for-profits are facing two to four years of very difficult times. We're all grappling with whether or not we have the resources to get through this. How well has our organization stewarded its reserve accounts, for example? The final goal – this is most important to me – is that they ensure that their boards are fulfilling multiple roles of

securing resources, providing proper fiduciary oversight, and offering strategic direction. In short, how healthy is the board, by objective standards?

Given the current economy, what issues are on your agenda?

I am concerned about what the global financial crisis means for, not only Oxfam America, but for all the not-for-profits we support worldwide. We are facing an unprecedented situation. Philanthropic markets all around us are contracting.

We also have a new administration in Washington that is committed to many of the same issues that we are in development and foreign assistance – and in reinvigorating relationships between U.S. institutions and the global community. How should we respond in areas like climate change, foreign aid reform, agricultural development, and so forth? What should we be doing? How should we position ourselves?

What do you see as the value of a search firm? Did the rigor of the search process help prepare you for your job?

In my case, I was living in Bangladesh, so I was in a field location where these opportunities often don't reach you. What's very useful is speaking to someone knowledgeable when you are at a great distance and, in effect, out of the market. It was very helpful to talk to Phillips Oppenheim independently about what was going on inside the organization and its commitment to change.

I had the opportunity for both large formal meetings with staff, managers, and Board members as well as informal, more candid meetings that were helpful in getting diverse views and asking the tough questions. The process enabled me to get a really good grip on what the opportunities and the challenges were going to be.

Patricia Schroeder, Former President and CEO of the Association of American Publishers (AAP)



Patricia Schroeder brought a wide-ranging background to her position at the helm of AAP, a diverse organization representing more than 300 publishers. Originally trained as a lawyer, Schroeder served in the U.S. House of Representatives for the State of Colorado from 1973 through 1997. Since assuming leadership of AAP in 1997, she mobilized its membership around issues critical to the publishing industry, from strengthening copyright laws and opposing Google's plan to digitize books to fighting international piracy and promoting literacy. Subsequent to this interview, after 12 years at the helm, Schroeder recently stepped down as CEO.

What do you see as your major accomplishments at AAP?

When I came on board, everyone thought AAP represented big publishers because our other member groups were underrepresented. I think we've done terrific outreach to the university press community and to smaller presses. We've worked hard to communicate that AAP is a home

for everyone and why we believe that the issues we're working on affect all our members. I think it has worked. People have stayed in and we've grown. Since I've been here, we've doubled our membership. This has certainly given us a stronger collective voice.

We've taken on many issues, the major one being the big suit against Google for which a settlement was filed last year. That was huge. The worst thing that can happen when you file a suit is to have some members say, "Well, I don't think that's a good idea, and I'm going to quit." We were able to bring everyone along by letting them know why it was such an important move and why it had to be made. We've also had successes in fighting international piracy and in pushing back against colleges that are digitizing course materials without permission.

What strategies have proven most effective for you?

Ask, listen, act. That's the approach I've always used. In a membership group, you have to convince people that it's worth their dues dollars to belong. I believe the Association is really their association, not mine. I should be listening to what my board and members tell me are the big problems and then come up with solutions for them.

People think leadership means that they should stand up and tell people where to go and what to do. That doesn't

work well in a membership organization. You have two ears and one mouth. That means you should listen twice as much as you talk – that's what a good leader does.

Where has your leadership resulted in the greatest positive change?

We've been able to hold a very diverse group of business models together during tumultuous times. In a way, you're an ambassador. You're trying to explain to one group why *their* actions might hurt another and why you want to keep everyone together. You need to build a strong voice while also responding to different constituencies.

What advice do you have for someone taking a CEO position in a nonprofit?

It's very different from a CEO position in the private sector. Organizations have tremendous pressures on them in this economy and lots of places where they can spend their money. So you better make yourself as relevant as possible to their bottom line, or they may not choose to work with you in the future. It's always important to remember that you work for them; they don't work for you. Trust is also key. You want to be as transparent as possible.

You have to keep your knees bent and stay flexible. I try to use my members' time efficiently and not burden them with a lot of process. I don't want them on 15 committees looking at issues they don't care about. I want their leadership in telling me what we should focus on so we can alleviate the pressures coming at them. My goal is to free them up so their time is being used on the right issues and they see AAP as a forum where they can talk about things the industry can do as a whole that they

can't do individually. Taking this approach really invites people to participate – and they want to.

Given the current economy, what issues are on your agenda?

Everything is in this whirling tsunami of change. We're seeing much more piracy. More and more newspapers and magazines are cutting out book reviews, so people don't even know where to go to find out about what's being published. You name it, it's happening. We're not unique – everyone else is going through the same thing.

What do you see as the value of a search firm? Did the rigor of the search process help prepare you for your job?

Phillips Oppenheim casts a wide net and connects the dots for you, which is very helpful. When the firm called me, I was teaching at Princeton, and I said, "There's no way I'm going to run an association in Washington." Phillips Oppenheim was very helpful in explaining what the Association did – and in making the connection between what it needed and my background.

The search process went very smoothly. Phillips Oppenheim had done its homework. The courtship was very quick and efficient. The firm gave me an accurate picture of what the issues were going to be. I knew it wasn't a Sunday school picnic! That's very important. You don't want the job misrepresented, because people won't stay.

Phillips Oppenheim provides excellence in recruiting nonprofit leadership, enabling nonprofits and their boards to attract leaders from across diverse nonprofit, public and business sectors.



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Our Consulting Team:

Jane Phillips Donaldson
jdonaldson@phillipsoppenheim.com
Debra Oppenheim
doppenheim@phillipsoppenheim.com
Susan Gluck
sgluck@phillipsoppenheim.com
Sarah James
sjames@phillipsoppenheim.com
Addie Jones
akjones@optonline.net

Becky Klein
bklein@phillipsoppenheim.com
Leslie Maddin
lmaddin@aol.com
Susan Meade
smeade@phillipsoppenheim.com
Paul Spivey
pspivey@phillipsoppenheim.com
Mark Tarnacki
mtarnacki@phillipsoppenheim.com

521 Fifth Avenue, 29th Floor
New York, NY 10175
Tel. 212.953.1770 Fax 212.953.1775

1990 M Street, NW, Suite 480
Washington, DC 20036
Tel. 202.331.1730 Fax 202.785.9735

E-mail: info@PhillipsOppenheim.com
www.PhillipsOppenheim.com