

NESC ONLINE BULLETIN

The National Executive Service Corps

Making a Difference

STRATEGIC PLAN “GOT US OFF THE DIME”

Crafting strategic plans is a signature NESC product. For the American Foundation for Suicide Prevention, this NESC product made a considerable difference. “The NESC-designed strategic plan and the follow-up Leadership Retreat it ran for us built a consensus that got us off the dime,” **AFSP’s Executive Director Robert Gebbia** told the nearly 100 attendees at NESC’s September 13 seminar at the Citigroup Building in Midtown Manhattan. “After that,” added Gebbia, whose 18-year old group supports research into the causes of suicides, “we grew substantially. NESC got us pointed in the right direction.”



Robert Gebbia

typical too was the dynamic of the process, which often is as valuable as the resulting formal plan; it compelled the organization to look hard at its operations, scrutinize its vision and mission and set priorities. “NESC made an enormous difference for us,” concluded Gebbia. “We are a very satisfied customer of NESC.”

Robert Gebbia is at inquiry@AFSP.org.

For information about NESC’s Strategic Planning services or if you want to discuss how your organization can benefit from a strategic plan, contact NESC Senior VP Marie Terry at mterry@NESC.org.

Teaching Financial Literacy

INVESTING. WHAT’S THAT?

Stocks. Bonds. CDs. Mutual Funds. Real Estate. Or even under the mattress.

All of these are ways of parking extra cash – though with historically extremely varying returns and risks. Ever greater numbers of Americans have been learning which way of investing is best for them, as they have been targeted – sometimes buried – by information from banks, brokerages and other financial services organizations.

Overlooked and ignored typically have been entry-level investors, those with some – but relatively modest – money to park down. A great many of these are immigrants who have succeeded in business, trades and professions but have little understanding of how to make their excess money work for them. NESC is about to change that and help them.

No Warren Buffetts. Funded by grants from the New York Stock Exchange Foundation and the JPM Chase Foundation, NESC will be launching its Financial Literacy Project early next year. With help from the Queens Borough Public Library and the Queens Council on the Arts, NESC volunteer instructors will conduct a pilot series of classes in targeted Queens communities to teach investing basics. From there, NESC plans to expand this financial literacy instruction to other parts of the city. “Our aim is not to discover the next Warren Buffett,” says NESC’s project director Burt Pines, “but to demystify and take the fear out of investing. No group deserves this more than successful immigrants.”

UPCOMING

- ❖ **Oct 18**
Strategic Planning Workshop
- ❖ **Oct 18**
NESC Orientation & Consultant Skills Overview
- ❖ **Oct 20**
Branding Workshop
- ❖ **Oct 26**
Arts & Culture Reception
- ❖ **Nov 17**
NESC Gala Awards Dinner

[Click Here for Calendar](#)

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Oct 26 Reception

MELLON FOUNDATION EXEC FEATURED



**NESC's
Betty Lefferts**

With an endowment of some \$4.5 billion (at the start of this year) and more than \$180 million in grants last year to museums, libraries, performing arts groups and other arts and cultural institutions, the New York City-based Andrew W. Mellon Foundation is a giant among grantmakers, appreciably larger, in fact, than either the Rockefeller or Carnegie foundations. On **October 26**, guests of NESC will have a chance to meet key Mellon

Foundation executive Catherine Maciariello, the foundation's Program Officer for the performing arts since 1996.

As featured speaker at NESC's 12th Annual Arts & Culture Sector Reception, at **5:30 pm at The National Arts Club** on Gramercy Park, Maciariello will describe how Mellon awards grants and how aspiring grantees can apply. Undoubtedly, a first step in the application process for

many of the reception's attendees will be their chance to introduce themselves to Maciariello. "It's a great way for a New York-area cultural group to learn about a great foundation and, as important, to make a valuable – very valuable – personal contact," says Betty S. Lefferts, NESC Senior Vice President for Arts and Culture.

For information contact: Kim Beltran; 212-269-1234, ext 116 or kbeltran@NESC.org.

Executive Search

NEED HELP LANDING YOUR NEW SENIOR EXEC?

Here's a checklist test for any non-profit organization:

- Needs a leader to take the organization to a new level
- Doesn't have time or resources for its own exhaustive search
- Lacks skills to design criteria for a quality search
- Has internal factions whose differences could delay or derail a search
- Tried its own search then was buried under mounds of low-quality want-ad replies



NESC's Paul Barrett

If any of the above boxes are checked, the non-profit likely needs expert help in finding its next key executive – a new president or CFO or controller or executive director or chief fund-raiser or marketing director or program officer or any other top tier staffer.

30,000 files—and more. NESC has been offering such help for nearly a decade – placing top executives at more than 100 mainly New York City area organizations, including Amnesty International USA, Marketing and Executive Networking Group (MENG), Queens Borough Public Library, South Street Seaport Museum, Meals on Wheels and ARC of Somerset (New Jersey).

To every search, NESC brings decades of experience. SVP **Paul Barrett**, before joining NESC, for years ran a New York City-based national search firm, while NESC CEO **Marvin Berenblum** is a 14-year veteran and former Managing Partner at Heidrick and Struggles, one of America's most respected and successful search firms. With criteria and position specifications set through extensive talks with the client and, then, drawing on NESC's exclusive database of 30,000 files – with access to vastly more prospects from other sources – Barrett and Berenblum typically contact about 100 potential candidates, sources and leads, narrow the list to a dozen or so and then shepherd the client's meetings with the candidates. They also help with the selection decision, something that can make a huge difference to the organization's future.

Affordable. The fee for all of this extremely affordable -- about half that charged by private sector search firms. Says Barrett: "We look for candidates who can pull an organization to a whole new level. The right candidate is more than a mere executive; she or he is a leader who – ultimately – can make a signal difference."

Paul Barrett is at pbarrett@NESC.org.

New Sector Head

Marie Terry at Social Services

“Here is where NESC can do terrific work,” said Marie Terry after her recent appointment as NESC Senior Vice President and Sector Head of Social Services. “Few organizations deliver more value to our community than do social service groups, yet too few of them are managed effectively. Many can benefit from our services – particularly because of the expertise of our consultants and the reasonableness of our fees.”

Marketing plans. Marie comes to NESC from 20 years at Macmillan/McGraw-Hill, where she, most recently, was VP for Marketing. She has a widely-admired track record for conceptual planning and execution of mar-

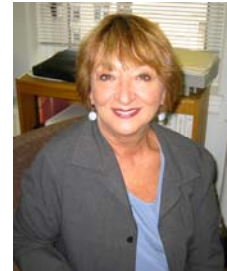
keting plans as well as a reputation as a leader with strong communication and presentation skills. Some of her major projects included launching reading, science and math basal programs for K-8 schools domestically and internationally. Her particular skill was in understanding the needs of professional teachers and then assuring that new textbooks met those needs.

Before Macmillan/McGraw-Hill, Marie worked for Van Nostrand Reinhold, a professional and trade publisher in New York. There, as VP of Marketing, she launched over 150 new books every year in the Culinary, Architecture, and Computer categories. Marie earned her BS in

Business Administration from Rider University (NJ) and lives on Manhattan’s Upper East Side.

Broaden effectiveness. As head of NESC’s Social Services sector, Marie’s initial focus is children’s services, community social service groups associated with religious organizations and NESC’s pioneering Career Continuation program for retirees. “The horrifying aftermath of hurricanes Katrina and Rita reminds us of the crucial contributions made by unheralded social service organizations. My role will be to broaden their effectiveness.”

Contact Marie to arrange a meeting with her at mterry@nesc.org or 212-269-1234; ext. 122.



**NESC's
Marie Terry**

NESC PRODUCTS & SERVICES

Business & Strategic Plans – helping nonprofits reach new goals by honing vision, resolving conflicts over priorities, allocating resources and identifying new opportunities.

Marketing Blueprints – analyzing a nonprofit’s services and designing a blueprint to market them dynamically.

Feasibility Studies – dissecting plans for new programs or even new spin-off organizations to assess feasibility.

Budgeting Assistance – assigning former chief financial officers to help craft realistic multi-year budgets.

Fund-Raising Strategies – crafting systematic fund-raising operations and identifying new sources of contributions.

Recruiting Top Executives – industry-standard executive searches that tap into new universes to fill top slots.

Leadership Training – workshops and drills to hone skills of senior execs.

Board Development – identifying new ways boards can help a nonprofit and then recruiting new board members.

Facilities Assessment – surveying space utilization and suggesting changes to save money and boost productivity.

Project Management – suggesting changes in how nonprofits manage projects to raise efficiency and cut costs.

Media Relations – designing operations for earning more media coverage and raising a nonprofit’s public profile.

Executive Advice – working one-on-one with CEOs on a broad range of organizational and operational issues.



Harry P. Sacks

Broad skills.
Deep
Experience.

From IT
systems to
cosmetics.
From marketing
& promotions to
dispute
resolution.



Welcoming

NEW ON THE NESC TEAM

Recently joining NESC as Consultants are:

Barbara Butler. Expert in managing and consulting on information technology systems. Authored technology books and *Home Office Handbook* (2001). Quarter-century of IT development and management at the Fed Reserve Bank of NY and then at Merrill Lynch.

Julian M. Kien. Decades in organization planning, trade association management and government affairs. Was President of Redding Consultant Group, which offers guidance on human resources management. Former Exec Dir of the Council on Labor Law. Former Personnel Dir of Lehman Bros. and Port Authority of NY and NJ. Has taught management and written extensively on human resource management. Served and serves on many boards, including Retarded Infant Services, Strauss Leukemia Fdn and Council on Excellence in Government.

James N. Kyrimes. Expert in real estate portfolio management and what he calls "econometric analysis." Teaches real estate risk analysis at NYU's Graduate Center. Long career as senior exec, dealing with real estate investments, at Stellar Management Corp, Shuwa Corp, AIG Global Real Estate and Integrated Resources. Has lectured at Columbia Univ Real Estate Program.

Harry P. Sacks. Founding and senior partner of Sacks Montgomery, specializing in construction industry matters, including dispute resolution. Involved in renovation of Grand Central Terminal and the Boston Naval Yard.

William H. Willis, Jr. Regarded as one of the nation's leading executive recruiters and is a member of the Executive Search Hall of Fame. Was President and Managing Partner of William Willis Worldwide from 1970-2004 and is founding chm of the World Search Group. Has served on Connecticut's Commission on Compensation of Elected State Officials and on the Human Resources Committee of Greater NY. In the early 1950s, led an expedition to Madagascar for the American Museum of Natural History.

Marjorie Wollan. A dazzling background as pres and CEO of Guerlain USA and Versace Perfumes, plus very senior posts at Estée Lauder gives Marjorie terrifically valuable marketing, management and promotional skills to bring to future NESC clients.

From Central Connecticut

Helping the Hartford Foundation

The Hartford Foundation for Public Giving, Hartford's major philanthropic organization, has selected NESC Central Connecticut to facilitate the Foundation's **Leadership Circle** program for selected executive directors of area non-profit groups. NESC Consultants Kiki Eglinton and Jane Tedder each will facilitate a group of participants in the monthly sessions of

this 9-month project. They will keep the sessions productive, probe for key issues, offer feedback and help the participants identify opportunities and action items.

Contact Elaine McDonald at ebmcdonald@comcast.net.

OCTOBER 26 – FIRST MUSEUM MEETING

To boost consultants' appreciation of local museums and increase their understanding of issues facing

museums, NESC Central Connecticut is organizing quarterly meetings at local museums. Launching the program is the October 26 gathering at the **New England Air Museum**. Michael Speciale, the Museum's Exec Dir, will talk about: "How They've Changed over the Past 20 Years: Challenges and Opportunities of Museums." The meeting is at 9:00am at The New England Air Museum, Bradley Int'l Airport, Windsor Locks, CT.

NESC September 13th Seminar

GUIDELINES FOR INVESTORS AND GRANTEES

“Understand the risks.” That was the cautionary counsel about alternative investments, stressed several times, from **John T. Moore**, Director of the Citigroup Alternative Investments Group to the nearly 100 attendees at NESC’s September 13 afternoon reception at Citigroup’s Park Avenue offices, hosted by The Pastolove Group at Citigroup Global Markets. **Diversification.** Deftly compressing his usual extensive presentation into just 20 minutes, Moore explained that for those able to assume the risks, such alternative investments as real estate, hedge funds,

private equity, managed futures and credit structures offer valuable portfolio diversification. “The entire goal of diversification,” he added, “is a rise in portfolio value with lower volatility.”

Clear goals. Preceding Moore to the podium in the soothingly lit Citigroup auditorium was **Pauline M. Seitz**, Director of the Local Initiative Funding Partners, a program of the Robert Wood Johnson Foundation, the nation’s largest health care philanthropy. Seitz urged the potential grantees in the auditorium to “be careful in approaching a

large grantor. For national philanthropies you need very clear, quantifiable goals.” She explained that LIFP, which plans to award \$5.8 million next year, always is looking for “new ideas that move the field forward.” She also stressed that the very appearance of a grant application counts. “The single-spaced grant proposals don’t make the cut” she said.

For information on LIFP: Pauline M. Seitz at pseitz@LIFP.org.



**LIFB Director
Pauline M. Seitz**

“Be careful in approaching a large foundation”.... and neatness counts

Welcoming

NEW BOARD MEMBERS

Ernest B. Fleishman, SVP, Education & Corporate Relations of Scholastic, Inc., New York, since 1989. Ernie is a career educator and a former Superintendent of Schools in NY, PA and CT and former Chair of the Harvard Graduate School of Education Board of Alumni. His degrees: BA from Williams College and a MAT in English and Ed.D in Administration from Harvard. He lives in Old Greenwich, CT.

Shaun Holliday, named President of New Business and Innovation at Newell Rubbermaid in 2005, was previously President of International Operations in Europe and Mexico for the Pepsi Bottling Group. Shaun was Director of Strategic Planning at Frito Lay from 1990-1994 and President of the Americas & Caribbean Region of Guinness Ltd. from 1990-1997. In 2000, Shaun joined eMac Digital LLC as CEO. His degrees: BA in Commerce from the University of Witwatersrand (South Africa) and MBA from the Kellogg School of Management, Northwestern University. He lives in Winnetka, IL

John R. Kirksey, SVP & Chief Diversity Officer of AXA-Equitable since June 2005, was earlier pres of The Kirksey Group, advising corporations on diversity and organization effectiveness strategies. John held key Human Resources positions with major insurance, accounting and publishing firms from 1983-2003. Earlier he was HR Director at the McNeil Pharmaceutical Division of Johnson & Johnson. John is regarded as a leading expert in cultural diversity. His degree: MA from Governors State University, University Park, IL

David A. McBride retired in 1993 after 17 years as a senior executive at Dun & Bradstreet Corp. and 6 years as a management consultant with McKinsey & Co. Subsequent to his D&B retirement, David was a founder and CEO of several technology-based start up companies, including Ibis Software, which was sold to Grey Advertising in 1998. He is now Vice Chairman of Oxford Analytica, Oxford, UK, a provider of macro political/economic news analysis to clients worldwide. His degrees: BS from Kettering University and an MBA from Harvard. He lives in Bronxville, NY.



John R. Kirksey

On Our Calendar

OCTOBER 10. Upper East Side **Cocktail Party** for NESC Consultants, hosted by NESC Board Exec Com Chm Eleanor Holtzman. Contact: Mary Ann Rivera at 212-269-1234, ext.125 or mrivera@nesc.org

OCTOBER 18. 8:30am-10:30am. **Strategic Planning Workshop** covering developing goals, resolving conflicts and transforming a plan into action, led by Gilbert C. Osnos, chm of RKG Osnos Partners, LLC. Fee \$20. At the Scholastic Building, 557 Broadway, NYC. Contact: Kim Beltran at 212-269-1234, ext.116 or kbeltran@nesc.org

OCTOBER 18. 9:30am-4:00pm. **NESC Orientation and Consultant Skills Overview.** 120 Wall Street, 27th Floor. Contact: Kim Beltran at 212-269-1234, ext.116 or kbeltran@nesc.org

OCTOBER 20. 8:30am-10:30am. **Branding Workshop** offering 6 steps for raising an organization's visibility, led by NESC Chief Operating Officer Ira Schwartz, former Managing Dir of D'Arcy Masius Benton & Bowles. Fee \$20. At the Scholastic Building, 557 Broadway, NYC. Contact: Kim Beltran at 212-269-1234, ext.116 or kbeltran@nesc.org

OCTOBER 26. 5:30pm. **Wine & Cheese Reception** hosted by NESC Senior VP for Arts & Culture Betty S. Lefferts, featuring remarks by Andrew W. Mellon Foundation Program Officer Catherine Maciariello. At the National Arts Club, Gramercy Park. Contact: Kim Beltran at 212-269-1234, ext.116 or kbeltran@nesc.org

NOVEMBER 17. 6:30pm, **First Annual NESC Gala Awards Dinner**, featuring CNN/US Pres Jonathan Klein, Connecticut Atty Gen'l Richard Blumenthal, National Legal Commentator Alan S. Kopit and American Bar Assn Pres Elect Karen Mathis. At The New York Botanical Garden, The Bronx. Contact: Mary Ann Rivera at 212-269-1234, ext.125 or mrivera@nesc.org

Last Word

CAREER CONTINUATION – THE NEW NESC SERVICE

America's companies face a growing challenge. And we here at NESC are beginning to help them meet it. We are identifying productive follow-on careers for their many senior and mid-level executives who are loath to "retire" after reaching traditional retirement age or after being phased-out of their positions.

Mobilizing thousands. For its 28 years, of course, NESC has offered opportunities for those who have completed their primary careers and want to give back to their communities. We have mobilized thousands of women and men to dedicate their valuable skills and experience to the nonprofit community in advisory and consulting capacities.



**NESC Chairman & CEO
Marv Berenblum**

Now, however, NESC has formalized

this process into a "Career Continuation" service. We have begun working with Ernst & Young, Public Service Electric and Gas of New Jersey and other firms that want to help their employees who are ending their primary careers. We are tapping our traditional consultant development workshops and restructuring our consultant apprenticeships to transition business execs into highly-competent volunteer consultants who serve NESC nonprofit clients. We are also running workshops on how they can deal with some of the financial and personal adjustments they are facing.

Double dividend. Recent surveys find that one-third of those contemplating follow-on careers do not expect to be compensated. This forecasts, as the boomers age, a vast pool of potential volunteers, rich in skills and experience, to serve the nonprofit community. With our evolving Career Continuation program, we at NESC will be doing ever more to transform this potential into actual, on the

ground volunteers whose efforts then will pay a classic double dividend: delivering valuable services to worthy nonprofit groups while creating an enriching second career for themselves.

Marv Berenblum

Chairman & CEO

National Executive Service Corps

Chairman & CEO

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