

Ted.

FIRM PROFILE

I love what I do. I work with professionals that also love what they do; making all of us better each day.

My firm, Ted Pietrzak and Associates is a small specialized consulting firm. We develop personalized programs that assist in building organizational capacity in not-for-profit organizations allowing them to better achieve their goals.

TP+A specializes in operational review, fundraising and community engagement, facility and strategic planning, developing architectural program scope, and managing capital projects. The firm conducts research, facilitates stakeholder forums, and assists organizations in developing a clear direction with identified priorities and a workable implementation plan.

I have over 30 years of continuous experience in C.E.O. positions at not-for-profit cultural organizations. My profession has availed me of expertise in community engagement, in developing strategic partnerships, and in forging synergistic collaborations. As a cultural leader I have worked in such diverse fields as the arts, community and economic development, higher education, and health care.

TP+A brings together a team of specially selected experts to meet our clients' needs and assist them in achieving their goals. Our associates specialize in developing brand recognition through effective communications, expanding community engagement and increasing fundraising capacity, planning for capital campaigns and "good" facilities, facilitating strategic planning, and building better boards.

We bring knowledge, creativity, energy, and integrity to any organizational challenge. We do not deliver cookie-cutter recommendations, but a hand-crafted solution and a workable implementation plan.

Ours is a professional, yet personal, approach, working closely with you to deliver value that strengthens your organization.



Ted Pietrzak



## OUR CORE CAPABILITIES

Ted Pietrzak and Associates (TP+A) provides specialized consulting services that are aimed at strengthening not-for-profit organizations. Ted Pietrzak, principal of the firm, has over 30 years of experience working in the not-for-profit sector. When required, the firm expands on existing expertise by working with selected associates that constitute a team of knowledgeable professionals. TP+A has developed unique analytical tools that allow us to better examine such vital areas as board effectiveness, development and advancement efforts, organizational “brand Identity” and communications, and the visitor experience. The firm has successfully developed programs that have strengthened organizations who have undertaken this analysis, and worked with them to implement changes. Services include the following:

BOARD DEVELOPMENT

BRANDING & COMMUNICATIONS

CAPITAL CAMPAIGN FEASIBILITY STUDIES

CAPITAL CAMPAIGN PLANNING & COORDINATION

COMMUNITY ENGAGEMENT

FUNDRAISING & INSTITUTIONAL ADVANCEMENT, REVIEW, & PLANNING

FACILITY PLANNING

MISSION & VISION REVIEW

STRATEGIC PLANNING

TEAM BUILDING

## OUR UNIQUE APPROACH

TP+A assures each of our clients that our engagement is objective and confidential and we hold ourselves to the highest ethical standards. We also understand that not-for-profit organizations are concerned about costs therefore we develop programs that meet an organization’s budget realities. With each new engagement, we listen and learn about the organization’s concerns. We conduct research to better understand the issues and the unique conditions that exist. When Required We bring together a team of knowledgeable experts that can best assist the organization and we apply analytical tools that we have developed to analyze conditions and objectify issues. We do not deliver cookie-cutter recommendations but a hand crafted solution and workable implementation plan. Ours is a professional yet personal approach, working closely with the organization, delivering value that leaves it stronger and ready to take on immediate and future challenges.

# AREAS OF SPECIALIZED SERVICE

## CONSENSUS BUILDING, VISIONING, & STRATEGIC PLANNING

We love this part of our work. We get people excited about their organization, focusing energy on creative ways to achieve their goals. Facilitating group process is one of our specialties. We use it in almost every engagement. Whether it is clarifying priorities, reviewing or revising an organization's vision statement or developing a strategic plan, our approach would be similar. TP+A would first clarify the issues amongst the organization's leadership. A discussion paper would be created, articulating commonly held perceptions and concerns. This becomes the background document for a retreat where the board, management group or both are included in an intense, high-energy facilitated session. We analyze the input and prepare a draft report for further input. We work with leadership and develop workable implementation strategies and time table which become the final report.

## PLANNING A SUCCESSFUL CAPITAL CAMPAIGN

Before initiating a capital campaign it is advisable for organizations to undertake a feasibility study. A feasibility study better prepares an organization for the campaign and ensures greater likelihood of success. An experienced third party is essential to conduct such a feasibility study. The feasibility process includes interviewing the organization's leadership, reviewing relevant institutional documents, analyzing the organization's development department, conducting a board retreat and sometimes a staff retreat; all to articulate the distinguishing characteristics or unique selling features of the organization. Results are then incorporated into a draft case statement which also includes the needs of the organization, estimated costs for the project and how it would benefit the institution and community.

The draft case statement is then tested through 40 to 60 confidential interviews with supporters of the organization and other community leaders including representatives of foundations and government. The findings are presented in a final report which identifies the strengths and weaknesses of the organization that would impact on the campaign, stakeholders' perceptions, campaign goals and potential gifts.

If a capital campaign be deemed feasible, TP+A has the expertise to design the campaign and work with the organization's leadership in the planning and implementation phases.

## BUILDING A STRONG BOARD

Ted Pietrzak and Associates assists organizations in building and sustaining effective boards. With 30 years of experience reporting to boards, as well as serving and chairing boards, Ted Pietrzak has both a theoretical and practical knowledge of what makes boards effective and ready to contribute to the organization's success. We have developed strategic recruitment programs, orientation approaches, training manuals and evaluation tools

but we also realize that developing board effectiveness requires an understanding of the unique dynamics of the organization that can affect governance.

TP+A has developed the Board Audit and much like a financial audit, it provides the framework to systematically look at an organization's governance. We examine communication, knowledge, leadership, participation, relations, representation and structure. We also look at recruitment, training and evaluation practices. We have conducted surveys, confidential interviews and facilitated retreats with trustees and management which revealed important perceptions regarding the board's operating strengths and weaknesses and better allowed the board and management to come to consensus on goals. The findings are entered into a database which when analyzed, clarify issues and allow TP+A to provide recommendations.

Ted Pietrzak and Associates test the recommendations with board leadership and management, refining recommendations and implementation strategies. Further follow-through may be required that could include facilitating retreats, providing customized orientation, preparing manuals, developing committee descriptions, and coaching board leadership. Critical to the process is a periodic review after training and implementation has taken place.

## **STRENGTHENING AN ORGANIZATION'S FUNDRAISING ABILITIES**

TP+A has created a development audit. It is a tool that is used to conduct a thorough and comprehensive review of the fundraising capabilities of an organization, examining both its fundraising programs and support structure. We recommend such an analysis if an organization is concerned about the effectiveness of its annual campaign or considering a capital campaign. This program of analysis reviews every area of the organization's development operations. We assess the return on investment on all its fundraising activities whether they are annual appeals, grants, membership, special events, or sponsorship. We review methods used. We review board involvement, committee structure, and leadership. We review job descriptions and interview the development staff and examine the role of the C.E.O. We also examine the institution's data base, its accuracy and how it is utilized. TP+A works with knowledgeable associates who have decades of experience in fundraising for many types of not-for-profit organizations. These experts with proven track records provide objective analysis and are able to recommend a comprehensive strategy for success.

The observations in the development audit lead to recommendations that are again is tested against their practical implementation. We recommend and propose solutions that are immediately implementable and those that require greater investment of resources and greater time to implement.

## **DEVELOPING EFFECTIVE COMMUNICATIONS & BRAND IDENTITY**

Many not-for-profits understand that "Branding" is important to big corporations but do not consider it applicable to their organization. TP+A believe "Branding" is the equity in your name; a powerful way for an organization to reinforce not "what" but also "who" it is. Ted Pietrzak has developed brand recognition for the organizations he has

led. Now TP+A has designed a program to clarify an organization's distinguishing characteristics; its personality; and how it can better distinguish itself amongst the competition. We see clarifying an organization's brand as a critical part of an overall communication strategy. We believe that an organization should not only communicate its programs and services but its identity and its "promise" to meet customers' expectations.

TP+A has developed an assessment tool; the Communication Audit. It is the framework by which to evaluate an organization's communication strategies and tactics with an aim to making the organization's marketing and public relation efforts more effective and efficient. The audit's goal is to recommend communication strategies and tactics that reinforce the unique, clear and compelling identity of the organization.

TP+A's Communication Audit is a comprehensive review of an organization's communications; more precisely the many ways an organization touches its stakeholders and all others who come in contact with the organization. The extent of the engagement is determined by the client. A starting point could be a community perceptions survey to understand any preconceive ideas about the organization and establish a bench-mark against future testing. The engagement could focus of existing stakeholders, those most familiar with the organization and draw on their perceptions. Working with design and communication experts, TP+A would conduct a review of all communications materials and methods including content, design, placement and frequency. Depending on the client's needs, we could expand the examination to all communications from telephone contact to admission desk personnel to ensure all are reinforcing the institution's brand identity.

TP+A at times recommends reviewing competing organizations' print materials and websites in order to clarify positioning options that could be adopted and those elements that can better distinguish the client from others. TP+A understands that branding is not only communication through visuals and text but in the many ways that an organization touches or can touch the customer.

## PLANNING EXCELLENT MUSEUMS

Architects usually design and coordinate the planning process for a new building. Their challenge is that they have never worked in a museum. They have to imagine what it takes to create a thoughtful exhibit, maximize opportunities for experiencing art and learning, move art from one end of the building to the other, and create a memorable visitor experience. Architects design spaces and though the spaces in themselves deliver an experience, they may also limit the institution's potential of delivering on its mission.

Our goal is to assist the institution's leadership in creating a facility that is the most perfect platform to do museum work, deliver experiences that are transformative and memorable and ensure that visitors see the museum as the place to be and the place to which they wish to return. We have done this in the award-winning museum; the Burchfield Penney Art Center, Buffalo, New York, named by the New York Times as one of the 44 places in the world to go to in 2010.

Our approach is to work closely with the museum team, understanding their facility and work needs and their desires. We have developed an input process that is aimed at articulating a vision for the building that will drive the

big concepts for planning the design and the capital fund raising campaign. We also have developed a community/stakeholder engagement process that defines specific facility needs and space characteristics. This is then outlined in a detail building program report which informs architectural design. We have also worked with architects and have reviewed and improved design plans and details in construction documents. We have further provided client representative supervision of museum construction.

We believe that without detail planning, community/stakeholder involvement and design oversight, mistakes will happen that will have to be lived with for a long time.

## CREATING A POWERFUL VISITOR EXPERIENCE

TP+A has developed a program that provides a unique institutional evaluation; an assessment of the visitor experience. Many studies have assessed the visitor experience. Visitors' experiences have been segmented into various visitor groups and expectations. Pre and post visitor surveys have been developed, conducted and analyzed with reports that have recommended improving exhibition signage and label copy, visitor services and establishing new educational programs. TP+A's approach to improving the visitor experience is significantly different. We start with the notion that the experience needs to be made memorable; "Can't wait to tell my friends. I want to come back next month. We and the kids had so much fun. I want to be part of this organization"; memorable.

We start with an initial visitor pre-and post-visit survey to establish a bench mark. We utilize a variety of data gathering techniques including focus groups, interviews and observations by experts. We then analyze our findings and provide recommendations in the following categories: communication touch points, customer service, facility conditions, grounds and signage, visitor navigation, visitor/staff contact, visitor services. Our recommendations are then presented in a report that includes comments on almost all aspects of the public dimension of the institution. An implementation plan is also included recommending initiatives that could see immediate results at little expense and initiatives that require greater time and resources to implement. We recommend a post-implementation visitor exit survey to verify areas of success and those requiring additional action.

## ADDITIONAL CAPABILITIES

CAPITAL CAMPAIGN COACHING

COLLECTION MANAGEMENT & ART PROGRAMMING

CUSTOMER SERVICE DEVELOPMENT

EXECUTIVE COACHING

DEVELOPMENT OF VOLUNTEER PROGRAMS