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**Laura Lewis
Mandeles**

Associate Principal

WOLFBROWN

Trevor Carlson

Executive Director

CUNNINGHAM DANCE
FOUNDATION

Cathy Leff

Director

THE WOLFSONIAN

**Jolley Bruce
Christman**

Co-founder and Principal

RESEARCH FOR ACTION

Advancing Legacy through Change

By Laura Lewis Mandeles, Associate Principal

In the last issue of *Sounding Board*, we examined mergers and collaborations, strategies that many organizations are using to manage economic and organizational challenges. In this issue we explore how founder-led organizations approach transformational change, considering sometimes radical, and sometimes more conventional alternatives.

In *The Limits of Organizational Change*, Herbert Kaufman reminds us that “The organizational potential for survival beyond the lifetimes of people is one of the major reasons for forming organizations. They are instruments for the preservation of knowledge and wealth to be passed along and accumulated by later generations, and may also serve as lasting monuments to those who found them.” We have discovered in our practice, however, that the transmission of knowledge and social benefits in the nonprofit world often requires an organization to focus not on maintaining infrastructure and programs, but on alternative strategies for preserving or advancing mission or legacy. The impending departure of a founder can energize planning efforts and provide board leadership with a key opportunity to consider structural solutions that were previously ‘off-the-table.’

How can a nonprofit’s assets be preserved through organizational dissolution? Can a founder’s vision be preserved or even enhanced through another structure? When should the essential organization be preserved, but with significant changes in governance, practice, or capacity?

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We asked three organizational leaders who have grappled with such questions to share their experiences and thinking. The **Cunningham Dance Foundation**, recognizing the unique challenges of future planning for an artist-led organization, developed a comprehensive plan to transition from a performance mission to one that will preserve the artistic legacy of Merce Cunningham's work, and ultimately transfer organizational assets and rights to a successor organization, the Merce Cunningham Trust.

The Wolfsonian museum, under pressure to find a post-founder business model to support a thin infrastructure and the long-term care and access to an extensive collection, forged a binding partnership with Florida International University that has created a sustainable organization and defined the museum as a teaching and scholarly resource. **Research for Action**, an educational research nonprofit, was faced with a transition from founders who had provided intellectual and organizational leadership since RFA's beginning; they approached the change by broadening research capacity, and moving to a board/executive director partnership model while preserving mission and values.

In different ways, these stories illustrate how founder-led organizations can surmount extraordinary challenges and achieve lasting impact through careful planning and bold action.

Trevor Carlson

*Executive Director
Cunningham Dance Foundation*

In 2000 Merce Cunningham created the Merce Cunningham Trust (MCT) and determined that it would hold the rights for his choreography. This act was the first step in a thoughtful approach to preserving his artistic legacy and the future of his company after he was no longer alive to serve as its Artistic Director. The necessary challenge was for the Cunningham Dance Foundation (CDF) to decide how we would manage the transition without Merce.

We asked ourselves, without our founding Artistic Director, could we still service our mission? Would funding and performances begin to decline? What would be lost in preserving Merce's legacy if we, as producers, cease to exist?

Our conclusion was the **Living Legacy Plan**, including three components: **(1)** preservation of the artistic legacy through the creation of Dance Capsules; these include light plots, stage manager's call sheets, reconstructing instructions for sets and costumes, performance of musical scores, and other material our production team has culled in presenting or reconstructing works for the stage. This information will allow for easier restaging of major dances, as well as scholarly study of the works in a way that an archive cannot do alone; **(2)** a final, two-year celebratory world tour, allowing the opportunity to feature the brilliant company of dancers trained by Merce himself; and **(3)** the formal closure of all aspects of CDF. This closure has within it a career transition package for every member of the organization, enabling everyone involved to plan ahead and participate throughout the entirety

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of the closure. During the Living Legacy three-year transition period, the trustees of MCT will determine how the Trust will function best to hand down Merce's legacy to future generations.

Finally, we have documented the entire process that led to creation of the Living Legacy Plan and will continue documentation throughout so that other single artist-driven companies have references and resources available to tailor their own model to preserve an artistic legacy.

Cathy Leff

*Director
The Wolfsonian*

The Wolfsonian's origins are in Mitchell Wolfson, Jr.'s collection of "decorative and propaganda arts" - a vast assemblage of objects including furniture, paintings, rare books, prints, industrial and decorative art objects, and ephemera. The Miami Beach storage building housing the collection began its transformation into a state-of-the-art museum facility in 1986. The museum's inaugural exhibition, *The Arts of Reform and Persuasion, 1885-1945* brought The Wolfsonian international attention and acclaim. By 1996, however, the museum had clearly "out ambitioned" its founder. It required a major transition to become a sustainable institution with outside support and active programs of exhibitions and scholarship. That transition was realized through an extraordinary act of generosity and a complete, carefully planned change of organizational ownership and structure. In 1997, the founder donated his entire collection and the state-of-the-art facility to Florida International University (FIU), a young, ambitious, urban research university that matched the youth and ambition of the institution he had created. The Wolfsonian is now fully part of FIU reporting to the university provost and assisted by an advisory board. The transition has seen its challenges - The Wolfsonian building is located 25 miles from the main campus, and finding a voice that could be heard in the context of a large institution has sometimes been difficult. The museum has made tremendous efforts to integrate into the life of the University. As a result, The Wolfsonian has become a vital resource for both teaching and research,

and the staff has forged partnerships with University faculty on a broad range of projects. As it enters its second decade as a part of FIU, The Wolfsonian, in partnership with the University, aspires to become a leader in advanced research on visual and material culture and in object-based learning; and to make the museum a vital locus for interaction between the academic community and the broader public. All parties to the original agreement celebrate the success and look forward to where this partnership will go. Right now the possibilities seem endless.

Jolley Bruce Christman

*Co-founder and Principal
Research for Action*

Research for Action (RFA) is a Philadelphia-based nonprofit organization engaged in education research and reform, founded in 1992 by a group of women committed to connecting rigorous research to their social activism and concern about equity in public education. By the spring of 2007, RFA had grown in size with national and local visibility. With a ramped up level of research and communications activity, we were operating in an environment of increased expectations and public scrutiny. These exciting, although challenging, developments came at a time when the founding principals were also looking toward retirement and asking: What would it take to secure the future of RFA as a sustainable organization? With this question in mind, we embarked upon a consultant-facilitated transition research and planning process spearheaded by board and staff leaders.

We explored multiple scenarios: merger, strategic partnership, joining a university, and yes, even declaring victory and closing the doors.

After six months of research and discussions, our board emerged deeply invested in RFA's mission and convinced that an independent organization was the surest way to serve that mission. But that would not mean business as usual.

The process had brought along even members of the board who were skeptical that it would have a clear and productive outcome, and built board members' confidence that they were indeed ready to assume a much expanded role in organizational governance as the founders stepped back. The board took responsibility for a leadership transition that would include one founder's retirement, the assumption by the second of a new organizational role as Director of Research, and the hiring of an Executive Director. Also, the board determined that RFA should expand its research capacity to conduct multi-method studies by hiring a senior level quantitative researcher and additional junior level quantitatively-oriented staff. The planning process also led to the election of a new board chair, a community lawyer who has had extensive experience with leadership transitions in the nonprofit arena. His role has been key in guiding RFA through a successful transition to new organizational management and research leadership, while keeping intact organizational values and roots in community-based research that influences education policy and empowers people to participate in the policy process.

CAMBRIDGE, MA OFFICE

8A Francis Avenue
Cambridge, MA 02138
Tel 617.494.9300

WASHINGTON AREA OFFICE

Red Maple Court
10627 Jones Street
Suite 301A
Fairfax, VA 22030
Tel 703.591.3661

SAN FRANCISCO, CA OFFICE

808A Oak Street
San Francisco, CA 94117
Tel 415.796.3060



8A Francis Avenue
Cambridge, MA 02138

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