The Nonprofit Quarterly · Spring 2008 · Leadership Without A Safety Net · Volume 15, Issue 1

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THE Nonprofit QUARTERLY

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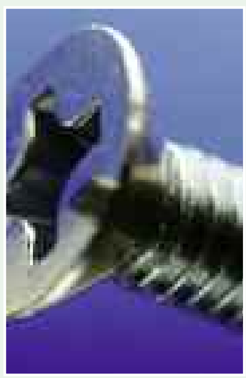

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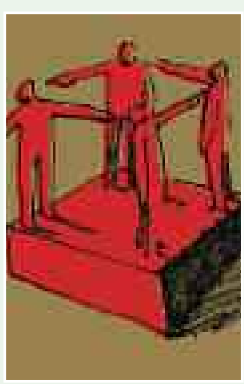

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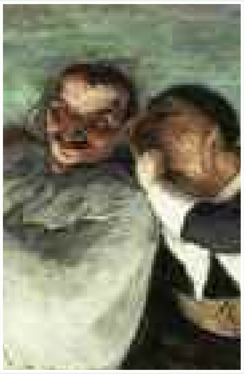

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Supplement

Mission: **To support active democracy**

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— DEBBIE YOUNG,
VICE PRESIDENT OF OPERATIONS,
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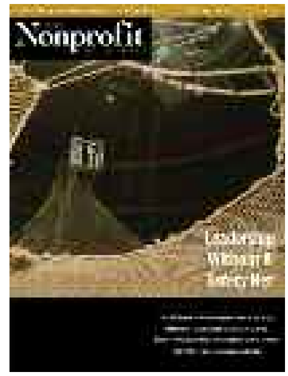
Welcome



THIS ISSUE OF THE *Nonprofit Quarterly* TAKES A cut at the much-discussed subject of leadership. This is a topic dear to our hearts, because we believe that nonprofits are (1) stronger and more effective when they develop skilled, empowered, and informed leadership at every level within and around organizations; and (2) critical to an active democracy if they take their role as training ground and venue for active citizenship seriously.

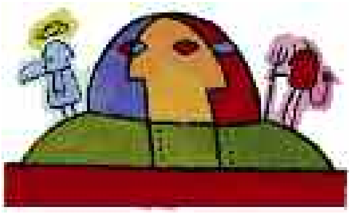
The articles in this issue take several approaches to the discussion of leadership, addressing these kinds of questions:

- Do we really have generational issues in the workplace, where older leaders refuse to move over for younger ones? What actually lurks behind the generational divide?
- What common missteps do boards make in selecting new executives, and how can your board avoid them?
- What should a new executive do in the first 100 days of his tenure at the helm of a nonprofit?
- What can an executive coach do for even seasoned leaders?
- How has the nonprofit sector undercut its intentions to develop broader leadership in community building?
- And finally, what part does volunteering play in developing new and more diverse leadership for our communities?

But we have purposefully named this edition of *NPQ* “Leadership Without A Safety Net” to draw readers away from the emphasis on strategic career development and toward a focus on leading for impact and effectiveness. These two objectives often seem to diverge.

In our framing article, “Our Leadership Difference: The *D* Factor,” the editors once again entreat readers to see the engagement and development of leaders as the strategic advantage available to every nonprofit. For those of you who do not yet know, *NPQ*’s mission is “to promote active democracy.” For us that is the bottom line of the sector and of this publication, which we see as a vehicle for achieving that mission. Do we create and lead nonprofits that give people venues in which they can act on their beliefs? Do we ensure that those venues are welcoming, nurturing, respectful, and culturally appropriate?

In the nonprofit sector, people spend a lot of time avoiding controversy for fear of losing funding or being excluded from places of power and influence. This generates a desire and need for predictability and acceptability, and that can have a deadening effect on our work and our organizations by slowing our ability to see our own mistakes, creating enormous blind spots, and discouraging inclusion—because inclusion and true diversity are always surprising. The nonprofit sector needs to be more than that. We hope this issue provides some inspiration and guidance as to how to lead powerfully from a collective base.



The Nonprofit Ethicist

by Woods Bowman

Dear Nonprofit Ethicist,
Is it OK for a nonprofit organization to take grant money from an organization that has "unethically" received that money? Taking money from Boeing, for example, which makes aircraft that are used in war to drop bombs where innocent people die and communities are torn apart.

Cleaner Is Better

Dear Cleaner,
Clearly you will do more good with the money than a "dirty" donor, but there are some potential pitfalls to be alert to.

Some donors are trying to buy respectability. Imagine Tony Soprano giving the opera enough money to get his name on something. It's not just because he likes Verdi. In real life, Richard Scrushy—indicted Health South CEO—lavished upwards of $700,000 in 2004 to religious causes in Birmingham, Alabama, where he was on trial for securities fraud at the time. And, what do you know? The jury acquitted him. The Ethicist can't read the jurors' minds, but he is pretty sure what Scrushy was thinking when he made the gifts.

*Some donors have made an investment in their own future. For years, Philip Morris lavished millions on the arts in New York City. It had a reputation for taking risks with new projects, which endeared it to many. Then, in 1994, during one of the early city council debates over a smoking ban, it contacted grantees to urge them to actively oppose the ban. As one compliant supporter said, "We were not lobbying on behalf of Philip Morris; we were lobbying on behalf of ourselves and the money pool." (*New York Times, *October 8, 1994) No kidding.*

This example is not as old as it seems—the fight dragged on for over a decade. Just this year the New York Times *(February 4, 2008) reported that the business school at the University of Texas refused to take further money from "reliable donor" Philip Morris when it sought "a more prominent role in sponsoring events and more interaction with students." Beware of altruism with strings attached.*

Corporate money is especially tricky because most corporations are different shades of grey. Take your example: 52 percent of Boeing's revenue comes from selling military systems and 48 percent from civilian pursuits (see Boeing's 2007 annual report). If the numbers were the other way around, would Boeing then be a "clean" donor? Ultimately it is up to your gut: if a corporation turns you off, politely refuse its largesse. If you want inexpensive guidance about which firms are not likely to cause embarrassment, look at the portfolios of mutual funds that use ESG (environment, social and governance) screens. It's probably OK for you to cash the check of any corporation you find there.

Dear Nonprofit Ethicist,
I work for a medium-size human services nonprofit (with a $30 million annual budget) that has accumulated an unrestricted reserve fund almost the size of its annual budget. The ethical quandary for me is that this reserve fund is not disclosed in the annual report or other public materials. Nonetheless, the organization tells donors and the community about budget deficits and that it lacks the funds to provide services. Moreover, as the result of cuts in government funding recently, the organization has also reduced the number of service centers and cut staff. This resulted in fewer clients being served. What's your take on the nondisclosure in routine PR materials and the staff and client services cuts while maintaining such reserves?

Transparent

Dear Transparent,
All of this information is contained in the IRS Form 990 and posted on the GuideStar Web site. Are your organization's donors so lazy that they won't look it up? The Ethicist used to be an elected official. He saw a lot of people try to hide embarrassing information. It always came to light—usually at an awkward moment in the most unflattering way possible because it was

revealed by opponents (who else?). It is always better to be the first to tell your story. As the saying goes, "The best defense is a good offense."

Case in point: the Ethicist once served on the board of a nonprofit that provided housing for chronically mentally ill persons. It had the same problem with a huge reserve but it took the initiative to tell its story. It created several board-designated accounts: an operating reserve, an emergency repair reserve, and a reserve for new property acquisitions. The result of designating sufficient resources in these areas was a negative unrestricted, undesignated net asset balance. They didn't cook the numbers to force the negative balance. It was an honest, but clever, way of telling their story. The information was on its financial statements for all to see, but in a way that automatically and plainly showed why the organization needed a lot of money in reserve and why it needed even more money to run the organization.

Of course, it may be the case that it does have too much in reserve. The board should take a look at this issue and decide what the organization really needs. Maybe the organization should spend some of the reserve to avoid painful cuts that affect services. It seems like there is a shortage of insight and a surplus of inertia around your shop.

Dear Nonprofit Ethicist,
I used to work at a satellite office of a national membership organization. One day I received a phone call from a donor who indicated that he would have a check cut by his company and sent within the week, and I thanked him. A short time later, the director of membership showed me a check from the same company, which could not have been the same one discussed given the paperwork required. It seemed clear that this check was a corporate membership renewal. (Also, it was for substantially more money than we had discussed.)

When I pointed this out to the director of membership, her response was that it wasn't my place to tell them so. The director of membership was also married to the executive director of the entire organization. I already knew better than to take it any further than that. A week or so later, the other check (donation) arrived. It was entered, I sent the thank you correspondence that was expected, and carried on business as usual.

Bothered

Dear Bothered,
The Ethicist's day job is teaching nonprofit finance, so this one resonates. First reaction: What? It seems like there was a lot of sloppiness on both sides. Second reaction: As a large organization, don't you have a central system to manage your relationships with institutional supporters? Third:

This kind of situation with marriages that span a chain of command is why we do not promote nepotism on our staffs.

This kind of situation with marriages that span a chain of command is why we do not promote nepotism on our staffs. Finally: Whether or not the institutional supporter caught the mistake in the moment, what fool of a nonprofit would want that lightbulb to go on later when there would no doubt be some possibility of that partner feeling scammed and deciding it no longer trusts you completely? The Ethicist's mantra is "Good management promotes good ethics and good ethics promotes good management."

Dear Nonprofit Ethicist,
There are two very large nonprofits in the same city doing essentially the same work. The development director of organization A had a longtime relationship with one of A's major donors, and submitted a proposal to him for a new project. The development director then left to become the CEO of organization B. The estate/foundation of that major donor has now funded that project at organization B. What's your reaction?

Conflicted

Dear Conflicted,
This is very tacky behavior and not likely to make for good organizational relationships but the Ethicist can see how it happened. First, the behavior may be unethical in that the development director produced product on organization A's time that is now accruing to the benefit of organization B. That is a form of theft if you want to look at it legalistically. But on the other hand, the Ethicist has to wonder how the project became so identified with the development director? This is why, in a lot of organizations, the development director is not the point person promoting a new program emphasis or special project, and it's why foundations very often do not want to talk to the development director about such stuff, preferring a meeting with the executive or designated program staff. In other words, foundations generally want to understand, see, and feel the institution's interest in the project and this is evidenced through the responsible representative. This is still a human interaction. That's why successful grant seekers take care to build relationships with foundation program officers. This leads to an unfortunate reality for organization A; now that the development officer is a CEO, the donor probably has more confidence that the job will be done than when the project resided at Organization A.

Woods Bowman is an associate professor of public service management at DePaul University.

To write to the Ethicist with your query, send an email to Ethicist@npqmag.org. Reprints of this article may be ordered from store.nonprofitquarterly.org, using code 150101.

Powerful Nonprofit Leadership: *The* D *Factor*

by the editors

In the society of organizations, each of the new institutions is concerned only with its own purpose and mission. It does not claim power over anything else. But it also does not assume responsibility for anything else. Who, then, is concerned with the common good?

—Peter Drucker,
The Age of Social Transformation

THE *Nonprofit Quarterly* CONTENDS THAT the main purpose of nonprofit and nongovernmental organizations is to promote civil society. It does so by providing forums for people to take collective action and to involve themselves in activities to improve society overall. This is the *d* distinction; the *d* is for democracy. And that's the framework for our consideration of the issue of leadership in the nonprofit sector.

While it is clear that we all want and need nonprofit organizations that are well managed, reducing our role to efficiency and solid administration not only takes a pass on our sector's higher calling; it chooses the safest, least creative path, a path that is unlikely to lead us out of many of our current social quagmires. Yes, there is an inherent tension between management and leadership work, but we must use that tension to come up with our most imaginative answers and avoid shrinking our organizations further into the background. That requires some good old-fashioned guts.

Risk Taking and Appropriate Inappropriateness

You have heard this before: leadership is different from management. For one thing, it differs from management in its degree of dangerousness. Ronald Heifetz asserts that taking leadership is inherently risky. It generally means you have moved out of a safe zone of anonymity and accepted opinion. You may be targeted for character assassination, derision, even "removal." As Heifetz and Linsky say in their book *Leadership on the Line*, you are now subject to being "marginalized, diverted, attacked or seduced." Seduction for nonprofits is often in the security of our relationships with people in power and in the predictability of our institutions. Most of us in nonprofit leadership positions are used to balancing the tension between stakeholder interests and acutely aware of the vulnerability of our organizations.

Most nonprofits encounter moments when they are called on to make choices that may remove them from the realm of the accepted. If you take leadership in a situation that needs change (a good description of most of our environments), you are there to create discomfort

Most nonprofits encounter moments when they are called on to make choices that may remove them from the realm of the accepted. If you take leadership in a situation that needs change (a good description of most of our environments), you are there to create discomfort with the status quo.

Suffragist Sylvia Pankhurst Speaking on a Street in Australia c. 1920. PHOTO © KEYSTONE/CORBIS

with the status quo. Leaders learn how to work creatively with that discomfort and help others to do the same.

Does sustaining public opposition build character? Unknown, but the willingness to risk is a necessary leadership quality. The fear of adverse consequences (damaging an organization's fundraising, board tranquility, or administrative consistency) can cause self-censorship out of a desire to stay in a comfort zone. But when leaders fail to leave that zone, it is difficult for them to judge the true risk or the potential gains.

Some have suggested a new way of defining leadership that focuses less on the search for that special charismatic someone and more on the ability to help build powerful collective will.

Heroic Leadership?

When we talk about great leaders, it often brings to mind a hero—someone leading a charge or a movement or a country forward—but the sector's language is sometimes at odds with that image. We tend to bandy the word *leadership* about as though it means nothing. We use the word leaders when we are talking about very ordinary, run-of-the mill functionaries—people who keep their heads down and engage only in advocacy to ensure that their next contract doesn't get cut—or people who attend fancy chicken dinners with other people who attend fancy chicken dinners.

But real leadership takes personal heroism. The more "different" you are from the norm of those in power, the more you have to push your way into the dialogue to pose alternate ways of believing and doing. When leaders insist that the current way of doing something is wrong, derision is often the first line of attack, with defenders of the norm pushing those who speak out to the margins. This can be acutely uncomfortable as you try to keep track of whether you have placed yourself too far out to have traction. In other words, for those of us without money, leadership can be tough emotionally unless we are "true believers" and are surrounded by others who share our convictions and are acting in concert.

But of course, not all leaders take us to good places. Human beings have failings and flaws and they can be fatal—if not for them, then for the rest of us. There is a thin line between self-perceived heroism and narcissism, especially if you are charismatic. Charisma is magnetism; it is a gift of personality that can be used well or poorly. It attracts others to you on whatever road you travel. Often we think of it as evidence of powerful beliefs, but those who have it almost certainly understand its usefulness—whether for good or for ill.

Peter Senge has discussed the deficits of the traditional single-leader model. "Especially in the West, leaders are heroes—great men (and occasionally women) who rise to the fore in times of crises," he writes. "At its heart, the traditional view of leadership is based on assumptions of people's powerlessness, their lack of personal vision and inability to master the forces of change, deficits which can be remedied only by a few great leaders."

Post-heroic Leadership

Some have suggested a new way of defining leadership that focuses less on the search for that special charismatic someone and more on the ability to help build powerful collective will. A less individualistic approach, the post-heroic leadership model recognizes the creative energy each participant can bring to an effort and places a value on a leader's ability to bring that to the fore.

Post-heroic leadership assumes that greater success comes with a greater distribution of power and responsibility in a system that focuses on a goal and a vision. By extension it also assumes that information and direction setting need to be shared.

If information, decision making, and critical contacts were shared, would we be so hysterical about a lack of "bench strength" in our organizations? This is not rocket science; as Peter Drucker remarked in a February 2004 *Forbes* article, what we are really talking about here is nothing more than hard work.

So let's stop the interminable discussion about how we can fill the leadership void, and let's do the hard work to move out of that much-bemoaned position of isolated executive into a place of leader among leaders. Every one of us should view himself as a mentor who has a thing or two to learn from our mentees. Every one of us should step away from "gatekeeping" between our boards and staff, and every one of us should invite constituents into the discussion—especially when it comes to direction setting. In this context, we must invite people to develop "civil-society skills" and the appetite and habits of activism. Otherwise, we risk neglecting our strategic advantage because the power base of most nonprofits lies in their ability to show active support among a constituency. To be comfortable doing so, we must ensure that members have the information they need and understand how things work in government and among potential institutional partners.

And so the skills of post-heroic leadership are necessarily somewhat different, although not entirely. We have not been living in brave times or in times where many people believed that they could necessarily make a difference in the country's future. Above all, nonprofit leaders need to impart each person's leadership potential over and over and see their leadership as actuated only when that message—"We can make [health care, underemployment, xenophobia, or community safety] different"—has stuck and is rippling out.

In this issue, Bill Traynor discusses how the change from big-chested leader to big-eared leader actually looks and feels and can be created specifically in community building. He advocates looking closely at every element of our practices, which in many cases have been neutered from the building of a persuasive collective voice to something akin to ineffectual and insincere mutterings. Nonetheless, in the era of virtual organizations, networks, and a breakdown in people feeling represented by representative democracy, an extraordinary opportunity has opened up as well.

It is our sincere hope that the current leaders of this sector will step up to what looks to be a truly historic challenge. In the development and promotion of broadly held leadership, nonprofits can break new ground and put the *d* back in democracy.

How does leadership look in your organization and when was the last time you saw a leader take an organization to an uncomfortable, but strongly principled position? Share your experience with *NPQ* at feedback@npqmag.org. Reprints of this article may be ordered from http://store.nonprofitquarterly.org, using code 150102.

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Boards and Leadership Hires: *How to Get It Right*

by Deborah Linnell

Always involved in setting the organization's agenda, the board soon realizes that it has made a mistake.

How a board handles a leadership transition can have powerful and long-lasting effects. This article discusses how the board's handling of this pivotal moment can result in long-lasting problems—and what your board can do to get it right.

Consider this example. For three years, the board of an organization that promotes volunteerism has struggled with a lack of faith in its executive director. The mild-mannered director lacks personal energy and functions as a coordinator rather than as a manager. His leadership style creates a loss in momentum, although the organization's rates of volunteer participation are high. Made up of young professionals, the board has let its frustration build, prompting this executive to intuit that he has not met expectations and resign. The board decides it needs a real go-getter who will focus on fundraising, and it gets what it wants: a motivated, former junior staff consultant at a for-profit firm serving nonprofits, who drives ahead without consulting others. In fact, she often appears annoyed when others voice their opinions. Staff begins to filter out.

Deborah Linnell is the director of programs at Third Sector New England.

Always involved in setting the organization's agenda, the board soon realizes that it has made a mistake. The problem is, its members have spent valuable social capital in promoting the new director as organizational savior. The director leaves within the year and the organization—now significantly weakened and disheartened—is consolidated into another. How do such things happen?

Board Perceptions Inaccurate

By design, boards are often disengaged from the day-to-day work of an organization. This detachment means that boards do not understand an organization's cultural dynamics as its staff members do, and this lack of understanding can prompt a board to develop uninformed beliefs and make poor decisions based on those beliefs. In the above example, the board developed a narrative about its executive director but failed to recognize that the director's role as a coordinator encouraged the organization's numerous volunteers to step up and get involved in core functions. The new executive was given a "charge" by the board to take greater "executive" leadership, and her approach ultimately stripped the organization of what kept it alive during times of struggle.

PHOTO © JOSE LUIS PELAEZ, INC./CORBIS

Nonprofit Governance as Adaptive, Not Prescriptive

For several decades, nonprofit boards have adopted a prescriptive approach to governance. But given the variety and dynamism of nonprofit organizations, some of these prescriptions do not make sense. A primary consideration for recruiting board members should be their passion for organizational mission. Organizations should convince attorneys, accountants, and other experts to volunteer their time as needed. They should also create a fundraising committee that is not board-centric. Those who govern should focus on stewardship of the mission on behalf of the constituents in whose name the nonprofit holds its tax-exempt status.

This kind of stewardship requires ongoing learning—about the organization, its culture, the field in which it works, the field's history and evolution, and the systems affecting constituents and the organization. It means adapting communication vehicles for this kind of ongoing learning and, most important, not relying only on the executive director to interpret the organization's current situation. This requires attracting board members who are system thinkers rather than bean counters and who can hold current reality and future vision in their minds while also aligning with the best elements of the organizational culture. This requires a different kind of recruitment, orientation, and ongoing management of governance and a deconstruction of the sacred-cow notion that board members should talk only with the executive director.

How Boards Can Get It Right

While the belief system of a board is developed upstream of an organizational transition, it flows down into the organization as a product of the hiring process. If boards want to do an excellent job at this powerful moment, they should take certain steps before a leader departs as well as once a leader decides to leave an organization.

Boards should take these actions before a leader declares readiness to leave:

- Board members should be recruited primarily for their commitment to the mission over skills, connections, or other characteristics.
- On occasion, have board members "intern" by taking part in the organization's core work so that they can familiarize themselves with the way the organization really functions.
- Create board/staff/stakeholder committees so that the board is integrated into organizational culture.
- Research nonprofit life cycles so that the board understands some of the reasons for an organization's behavior.
- Ensure that the organization has depth or bench strength to prevent overdependence on a single leader.
- Solicit information formally and informally and listen to constituents, clients, community members, staff, and funders; ask them to tell the truth. If an executive director is in continuous friction with any or all of these parties, he does not understand leadership, and the board should act to move this person out for the health of the organization.

Boards should take these actions once a leader declares readiness to leave:

- Do an early exit interview to get perspective on an outgoing leader's belief systems; style; and experience with board, staff, and other stakeholders.
- Assess the organization—its position in the field, its financial state, its relationships with stakeholders, its culture—any chronic problems and strengths and lay out a list of desired characteristics for a new director. It is almost always better for an external party to do this evaluation, but take the time to challenge your own assumptions about what the organization needs. Leadership transition consultants may be the best external candidates for this role.
- Create a position profile for the new executive based on internal and external assessments and a consideration of the organization's needs relative to its life cycle over the next five to seven years.
- Involve the staff and, where appropriate, other stakeholders in hiring the new director.
- Create a set of interview questions that identify the leadership qualities that promote a healthy organizational culture and ensure that regardless of the skill or experience of a new hire that these qualities remain "the essentials" for executive leadership.

Anyone who spends a lot of time in nonprofit environments has seen a hundred variations on this theme. The board sincerely believes that it has taken the organization "in hand" even while it eliminates some of its most useful assets. Even if a board listens carefully to an executive director, it may get a distorted view of what an organization needs. For instance, a board may "know" from the organization's executive director that the staff underperforms. But does it also know that keeping your head down and "covering your butt" are the order of the day? Seeing the production problem as the result of recalcitrant staff takes you someplace quite different from seeing the problem as a combination of these problems: a lack of distributed accountability, a fear of stepping out to make suggestions, and the absence of a passionate shared sense of mission. Many boards get stuck on a superficial characterization of the state of an organization that falls short of real understanding.

Disconnection becomes particularly acute when board members make assumptions based on a narcissistic attachment to their own knowledge and experience. Some board members join a board with a "deficit attitude" and assume that nonprofits do not understand how to operate well and that they need a more business-like approach. Boards are attracted to such people for three reasons: (1) boards believe it is best to recruit members from a short menu of professions, such as human resources, accounting, marketing, and law; (2) boards want members who can build a bridge to the money, and (3) boards tend to reproduce themselves, recruiting like-minded people to replace retiring members. But if these board recruits have little knowledge of an organization's history, context, or constituents and only the vaguest understanding of its programs, their conversations revolve around only what they know.

These misconceptions are not the fault of individual board members, whose orientation often does not require them to "live" in the organization's core work for a day or two. Some consultants and executives, in fact, frown upon "normalizing" board members (i.e., having them take part in an organization's day-to-day life), but the likelihood of board-staff misalignment increases when dialogue between board and staff members is discouraged. Lack of board-staff connection often occurs and is justified out of a fear of "inappropriate communication" between the bodies. The underlying thinking smacks of a fear of transparency and of a rigid organizational hierarchy that blocks board members' understanding and can make board members truly dangerous in the hiring process.

Defaulting to Individual Style

Over the course of three years, a large animal rescue league had two "unintentional interim" leaders after the founding director departed. The first was inexperienced and took all her direction from an overly involved board president who in essence ran the organization. Her inexperience caught up with her, however; the board of directors turned on the officious board president, and she was terminated. Another interim was hired who was extremely harsh on staff to the point of being disrespectful. The organization's reputation was in tatters; staff and all-important volunteers were demoralized and left in droves; and the board supported the inappropriate interim, believing that standing behind the executive director was its role.

Leadership That Promotes a Healthy Nonprofit Culture

While no leader is perfect, an effective leader maintains the essential qualities of a healthy organizational culture: that is, being purpose driven, transparent, and accountable; having a commitment to ongoing learning with and on behalf of constitutents; and having sound management. These leaders can do the following and facilitate others to do so as well:

- *Partnership building.* Leaders who partner with and inspire the groups who make up the system to move together are able to leverage capacity toward achieving mission and vision.
- *Continuous learning.* These leaders actively seek constructive feedback to enhance leadership and professional skills and incorporate diverse opinions.
- *Analysis and synthesis.* Such leaders also analyze and synthesize historic and current patterns and systems affecting constituents or creating barriers to change. Recently popularized as "right-brain thinking," this approach enables leaders to see the interrelatedness of events and understand the impact of the community and constituents on the organization. Smart leaders enlist multiple perspectives to understand the current situation—its merits, flaws, and areas for change.
- *Whole-systems thinking.* These leaders understand that they are part of the system and organizational culture, not outside of it. Executive directors and board members often mistakenly believe that they are in charge. They can influence a system through their decisions, but those who make up the system affect it as well. Since no individual controls the organization, its members are in a continuous dance of influence with one another. Good leaders understand this and facilitate a mutuality of purpose and identify management disciplines that are most effective rather than exert individual mandates.
- *"Authentic" communication.* These leaders communicate authentically from their true selves and do so transparently with all stakeholders. Healthy, self-aware leaders who can communicate clearly and honestly enable organizational cultures to thrive. This means respecting confidence and boundaries, not hiding behind excuses like "The auditor says," or by "gatekeeping" information from staff, constituents, and, yes, the board.
- *Understanding of cultural dynamics.* These leaders understand the dynamics of the dominant culture within the organization (and the systems in which an organization exists) and its impact on diversity and the inclusion of people, ideas, activities, and community impact.
- *Effective management.* Finally, these leaders manage well. They ensure that finance, fund development, human resources, and facilities management are attended to and done well. Many good leaders have the various skills listed above but are undone by an inability to accomplish and delegate important management functions in a timely, well-organized way.

But the executive director negelected one critical area: recruitment of board members who would align with the healthy culture he had built.

By threatening a union drive, the remaining staff forced the question and ousted the inappropriate interim. The organization lucked out with its next interim, who eventually became the executive director. He believed in supporting staff to become critical thinkers and reflective practitioners and asked for their opinions about everything. He also believed in stakeholder involvement and constituent voice and continuously surveyed for feedback on the organization's performance relative to its mission. In less than two years, the organization's operations had turned around completely.

But the executive director negelected one critical area: recruitment of board members who would align with the healthy culture he had built. Because he was a capable leader, he managed the board by producing excellence, good reports, good results, a good reputation for the organization, a rebuilt funding capacity, and even program innovation. But because of his lack of time, interest, or disbelief in the influence of the board of directors, he did not change board membership much. He did not ask board members to do what they had been required to do in the past: to volunteer for at least six months in the animal shelter learning the ins and outs of the business, getting to know staff and volunteers, and deeply understanding the culture of animal rescue work.

After seven years, the director decided to leave. He presented the board with materials on executive transitions, but board members decided to conduct the hiring process themselves. The next director they hired had an excellent fundraising résumé in a different field (social services) and had some experience as an executive director of a local affiliate of a national organization that had required a good deal of responsibility on the ground. But despite these experiences, the director came in and led hierarchically. Staff and volunteers who were used to a culture in which they were respected and their opinions were heard and most often acted upon, bristled under the directiveness of the new executive. Within a year, the director had undone the vibrant culture built by her predecessor over the prior seven years —and with the blessing of the board of directors, which was always slightly suspect of the former director's facilitative, flattery-based style of leadership but never questioned it given the unprecedented success of the organization under his leadership.

In a matter of months, a healthy organization became unhealthy. The former executive could have helped the organization he worked so hard to rebuild with one small point of leverage: by developing a board of directors aligned with the culture of the organization he had built. If he had done so, the board would have understood that it would take a particular kind of leader to build on the success of the previous executive. And it might have prevented a new executive from managing based on her own dictates and without consideration for the organization's past, the field in which the organization was situated; or for staff, volunteer, and community needs. Four years later, this organization has lost more than 50 percent of its staff, and its reputation is once again suffering with funders and community partners.

In these situations, line staff members are often excluded from the process of selecting a new executive director. The expectation is that a new boss will "manage" staff, and boards fear self-interest will taint such participation.[1] But boards ignore an important perspective when they do so, since line staff tends to embody the culture of the organization. Rather than taking the time to hire a candidate who is a good match for the culture of an organization (someone capable of asking, "Does the organization need to be nudged in a new direction, or does it need its best characteristics reinforced?"), boards often hire a manager and allow him to manage in whatever way he wants—as if management style were value-neutral.

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Management Trumps Leadership

For years, boards have hired for management skills over leadership skills. This trend has increasingly placed a premium on the ability to manage finances and fundraise over competencies that reflect whole-systems thinking, such as the ability to build shared vision and facilitate the ongoing engagement of multiple stakeholders toward that vision. Management skills are important, of course, but they aren't the drivers of true "nonprofit excellence."

Still, hiring primarily for management skills

If a board ignores its organization's constituents and its staff's requirements of a leader, the hiring of a new executive can create a disconnect that rocks organizational culture.

is understandable. Many nonprofits have trouble finding a visionary leader and a supermanager in the same person. And when organizations move from the first, or "family," stage to the second, or "improving management systems," stage, a board often defaults to management attributes simply because it has experienced the fallout of inadequate financial or human resource systems. Again, this focus is not necessarily wrong in the moment, but it may stall the organization for years to come by assuming that the preponderence of needs now (concerning policies and procedures, for instance) will remain the same over the next five or 10 years. Boards tend to hire based on their problems with a departing executive director. As a result, they often rush into the hiring process to "fix" those issues rather than take the time to reflect on where the organization is now, where it is going, and how to find the best leadership fit for the future.

When boards do not recognize problems as being related to a stage of development—and in particular, when an organization is making the transition from the first to the second stage—it can make common mistakes with predictable outcomes. For instance, if a board overcorrects and hires a rigid and controlling director, the organization's staff, members, or constituents may revolt, spit out the newcomer, and return to the first stage.

Or if a board hires an operations person without strong leadership capacity, the organization may wander forward slowly without recognizing it has lost its potential for influence and excellence. Too many boards are satisfied with well-managed nonprofits and fail to question whether an organization has optimized its mission or validated its strategies through close engagement and work with constituents—even if the effort means the organization must reinvent itself to do so.

Risk-Averse Managers as Board Proxy

Boards may hire risk-averse executives in reaction to a visionary but unstructured leader. Boards who see themselves as protecting an institution's integrity often place a premium on financial and organizational stability over, say, fighting the good fight with the powers that be about an unpopular issue. Risk-averse hiring may also result in community institutions that feel more bound by their grants and contracts than by those they serve. In the end, this approach limits an organization's appetite for organizing, advocacy, and innovation and diminishes its focus on community impact in favor of institutional security.

Ideally, board, staff, and other stakeholders weigh risk taking and risk management and tip the scales in favor of constituents' best interests. This sometimes requires a willingness to choose the less secure path, but that choice becomes nearly impossible if a board hires a director who is more interested in compliance or the organization's image with corporate funders than in doing what is right on behalf of constituents.

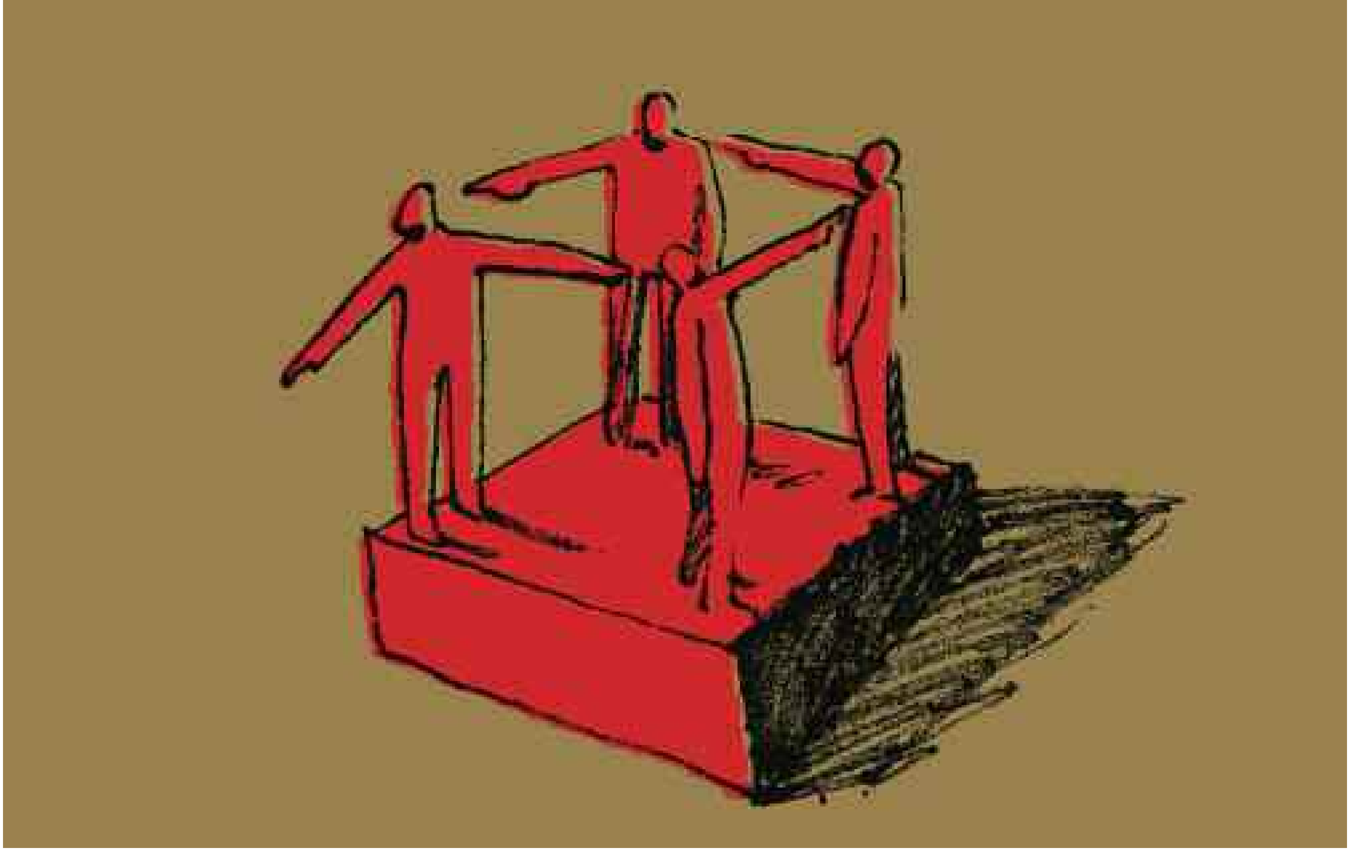
Leaders in Board's Own Image

If a board ignores its organization's constituents and its staff's requirements of a leader, the hiring of a new executive can create a disconnect that rocks organizational culture. The mutual reinforcement of board members and executive directors concerning management style, choice of programmatic strategies, race, gender, and class creates a closed loop of people with the same attitudes, mental models, reference points, and blind spots. If they do not have a strong discipline of inquiry, a desire to challenge the status quo, and an ingrained curiosity about how best to serve constituents, this closed-loop system can't align with the community it serves and organizational culture fractures. Soon, it becomes a requirement to "gatekeep" ideas and approaches that diverge from the norm and to support the board's and the director's perspective—even if this perspective runs counter to the truth. Creative disruption is neither understood nor welcome.

Endnotes

1. Ori Brafman and Rod A. Beckstrom's book *The Starfish and the Spider: The Unstoppable Power of Leaderless Organizations* brings home the point that sustainable businesses and nonprofits rely on multiple leaders at all organizational levels rather than on one leader at the top.

Do you have an experience concerning hiring new leaders that you would like to share? Write us at feedback@npqmag.org. Reprints of this article may be ordered from http://store.nonprofitquarterly.org, using code 150103.



Gap or Pap:
Generational Differences at Work

by Jennifer J. Deal

Editors' note: *This article is adapted from Jennifer J. Deal's* Retiring the Generation Gap: How Employees Young and Old Can Find Common Ground, *Wiley/Jossey-Bass, 2007.*

The generations now of working age value essentially the same things.

When it comes to our understanding of generational differences in the workplace, conventional wisdom has it mostly wrong. The conventional shorthand for the four generations that now share our nation's workplaces goes something like this: the Silent Generation values hard work, baby boomers value loyalty, Gen Xers value work/life balance, and Generation Y (the generation just entering the workforce) values innovation and change.

Or in terms of negative stereotypes, the Silents are fossilized, the boomers are narcissis-

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So if trust at work isn't determined by age, and if people of all generations want the same things at work, why is there so much workplace conflict among people of different generations?

Defining the Generations

The Silent Generation (1925–1945). This group is called the Silent Generation because it tends to be quieter than the baby boomers and isn't discussed as much. But if you look at the age range of this group, you will see how powerful its members are.

Early boomers (1946–1954). This group is made up of children born following World War II. The massive increase in the birth rate, known as the baby boom, began shortly after the end of the war.

Late boomers (1955–1963). This is the second half of the baby boom.

Early Xers (1964–1976) The group identified as Gen X began when the birth rate decreased after the end of the baby boom. The term *Generation X* became widespread after the publication in 1991 of Douglas Copeland's book of the same name. Charles Hamblett and Jane Deverson's 1964 novel, also titled Generation X, described a generation that would come of age at the end of the twentieth century as apathetic and materialistic.

Late Xers (1977–1986) This group includes the youngest part of Generation X.

tic, the Gen Xers are slackers, and the Gen Yers are even more narcissistic than the boomers. But stereotypes aren't as accurate as many people think they are. Research conducted at the Center for Creative Leadership (CCL) shows that the generations now of working age value essentially the same things.

CCL spent seven years gathering information from more than 3,000 leaders in the United States about their work habits, perceptions of other generations, impressions about trust in the workplace, and attitudes about work in general.[1] The data was gathered from people working in both the for-profit and nonprofit sectors. Interestingly, the results were the same for workers in both sectors.

The research showed that the generations now of working age want essentially the same things from their jobs: to trust their supervisors, to be paid well, to have interesting work, to get feedback, and to have the opportunity to learn.

What about the idea that young people are lazy and don't work as many hours as older people do? The research shows that the number of hours you put in at work depends more on your position in the organization than on your age; no matter how old you are, the higher your level in your organization, the more hours you work.

What about the fact that older people are more resistant to change than younger people are? The research shows that no one really likes change, primarily because workers think they are going to lose as a result of change.

One of the striking results was about levels of trust. Neither younger workers nor older workers are more trusting at work; all generations are equally trusting or distrustful. For example, 61 percent of respondents say they trust their peers, 64 percent say they trust their direct reports, and 70 percent say that they trust their boss. But only 47 percent say that they trust upper management to do the right thing, and only 54 percent say that they trust their organization to keep its promises. In effect, 53 percent of respondents don't trust upper management, and 46 percent don't trust their organization. Workers of all generations responded similarly, as did men and women of all ages.

Interestingly, people at the top of an organization responded significantly differently from everyone else. More than 70 percent of those at the top and in executive ranks say that they trust their organization, while 56 percent of upper management say they do, 51 percent of management do, and 47 percent of professionals do.

Why does this difference exist? Because we tend to trust people with whom we interact, in large part because we can do a pretty good job of predicting what they are going to do. People in executive positions can do a better job of predicting what an organization is going to do because they are largely responsible for organizational decision making, an advantage that those at lower organizational levels do not have. So it is no surprise that there is a disconnect between people who run organizations and those below them; workers who direct an organization view the organization as more trustworthy than do those below them. Again, people of different generations have remarkably similar opinions about how trustworthy (or untrustworthy) an organization is; the difference is by level.

So if trust at work isn't determined by age, and if people of all generations want the same things at work, why is there so much workplace conflict among people of different generations? The conflict has less to do with age or generational differences than with clout—that is, who has it and who wants it.

Clout includes control, power, authority, and position. The generation gap is blamed for conflicts that really have nothing to do with fundamental generational differences. Most conflicts have everything to do with the natural desire of older people to maintain their clout and the desire of younger people to increase theirs.

Conflict often stems from one group's notion that it gets to make the rules and that the other group has to follow these rules. If the rules are challenged, so too is the superior position and stature of those who believe they are the rule makers. In most organizations, older people have set the standard; as long as the younger generation complies, no gap or conflict exists. But of course, younger people bring their own views and experiences to the job and, therefore, challenge the status quo.

Organizational authority that comes with position in the hierarchy is one way employees get clout. People also use other attributes—age, political acumen, organizational tenure—to increase their clout within an organization. This is especially true in less hierarchical organizations where the ability to influence others is closely tied to clout.

As organizations increasingly promote younger employees over older ones, or as new (often younger) people take the reins of leadership from older leaders who are retiring, older people left in the workplace naturally work to maintain the balance of power—in their favor—by using their greater age and experience. Fear of potential loss of clout shows itself in complaints about lack of respect, dismissing the ideas of younger people, valuing experience over innovation, and so on.

Younger people engage in clout trumping as often as older people do. In an effort to increase their clout, younger generations may complain about not being taken seriously or may criticize older ones for being resistant to new ideas or for their unwillingness to embrace technology. Others claim that older people are out of touch and not tuned in to the needs of clients and constituency groups.

So what can you do about the inevitable conflicts among the generations? The best thing is to identify the conflicts for what they are: typically the result of miscommunication and mis-

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Ten Truths for Multigenerational Workplaces

Look past the stereotypes, and learn these ten truths about generational conflicts at work, gleaned from a seven-year study by the Center for Creative Leadership (CCL).

1. All generations have similar values. Lots of discussion focuses on major differences in values between older and younger people—as if these differences were an established fact. The most striking result from CCL's research is how similar the generations are in terms of their values. Family is the value chosen most frequently by people of all generations. Other values included in the top ten by people of all generations are integrity, achievement, love, competence, happiness, self-respect, wisdom, balance, and responsibility. So why do people at work think the values of different generations are so different? Because even though the values are the same, the behavior that goes along with those values may be very different. Older workers, for example, may show the importance of family by working long hours to give their families a comfortable life. Younger ones may value family equally by working fewer hours and spending more time with their families. The value is the same, even though the behavior is different.

2. Everyone wants respect. We often hear that younger people are disrespectful of older employees and people in authority. We also hear complaints that older people show no respect for younger talent and ideas. The reality is that everyone wants respect, but not everyone defines it the same way. Older people primarily view respect in terms of having their opinions given the weight they deserve and having younger workers do what they are told to do. Younger respondents characterize respect as having others listen and pay attention to their ideas.

3. Trust matters. The different generations have similar levels of trust in their organization and in upper management: they don't trust them much. People of all generations and at all levels trust those they work with directly (e.g., bosses, peers, and direct reports) more than they trust their organizations. And workers trust their organization more than they trust upper management.

4. People want leaders who are credible and trustworthy. What do different generations expect from their leaders? It turns out that age doesn't matter much. People of all generations want leadership to be credible, to be trustworthy, to listen well, to be farsighted, and to be encouraging.

5. No matter your age, organizational politics are a problem. Everyone who isn't winning at the political game dislikes it, and even the winners don't much like it. All generations are concerned about the effect of organizational politics on their careers, on being recognized for the work they do, and for getting access to the resources they need to do their jobs. Employees know that political skills are a critical component of moving up and being effective at higher levels of management, even if they don't like it.

6. No one likes change. The stereotype is that older people dislike any workplace change and that younger people love change more than they love their iPods. These assumptions are far from true. In general, people of all generations are uncomfortable with change. Only 12 people in the study say they like change. Resistance to change has nothing to do with age; it is all about how much one has to gain or lose because of the change.

7. Loyalty depends on the context, not on the generation. It's often said that young people are more disloyal than young people were in the past. Our research shows that younger generations are no more likely to job-hop than older generations were at the same age. In addition, people of all generations don't think that being loyal in the traditional sense (one employer for life in good times and in bad) is good for a career. The trend of greater loyalty among older workers is, in fact, related to context, not to age. For example, employees who are closer to retirement are more likely to want to stay with the same organization for the rest of their working lives.

8. It's as easy to retain a young person as it is to retain an older one—if you do the right things. Just about everyone feels overworked and underpaid. People of all generations have the same ideas about what their organization can do to retain them. They want the following from a job:

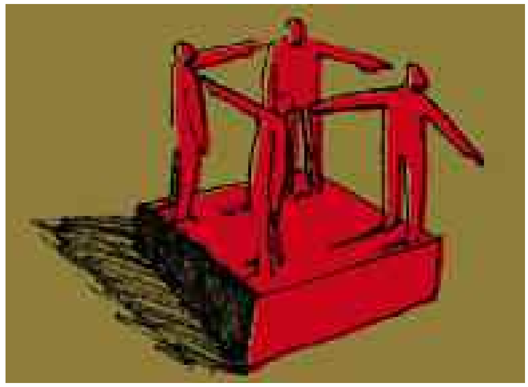
- opportunities to advance within their organization;
- opportunities for learning and development;
- respect and recognition;
- better quality of life; and
- better compensation.

9. Everyone wants to learn—more than just about anything else. Learning and development are central issues for respondents of all generations. People of all generations want to have the training necessary to do their job well. They are also interested in what they need to learn to get to the next level in their organization. Five developmental areas have made it onto every generation's list: leadership, skills training in their field of expertise, problem solving, decision making, and team building.

10. Almost everyone wants a coach. We've heard that younger people are constantly asking for feedback and can't get enough of it. We've also heard that older people don't want feedback at all. According to our research, everyone wants to know how he or she is doing and to learn how to do better. Feedback can come in many forms, and people of all generations prefer to receive it from a coach.

understanding, fueled by common insecurities and the desire for clout. And because you know how much people of different generations share in terms of what they want at work, you'll know that the people involved in the conflict probably want similar things. Understanding its real roots can help you look deeper into the *real* causes of the conflict du jour and help you make more informed decisions about what you can do to eliminate—or at least mitigate it.

A better understanding of the similarities among people of different generations makes work life easier because employees don't have to twist themselves into knots trying to accommodate each generation's individual whims—and they don't have to worry about learning a new set of whims when the next generation comes along. What people in organizations need to do is ensure that everyone is heard and that everyone feels respected. If you can do that, the gap will be retired.



Identify the conflicts for what they are: typically the result of miscommunication and misunderstanding, fueled by common insecurities and the desire for clout.

Endnotes

1. Respondents are mostly from large organizations; 41 percent of respondents were male, 59 percent were female, a reflection of the high number of nonprofit employees participating in the survey. Eighty-eight percent self-identified as white, 6 percent as black, 1 percent as Asian, 2 percent as multiracial. More than half of respondents had a master's degree or higher, while approximately one-third had a college degree.

Is the dialogue about generations in the workplace full of hype, or do the generations really approach work differently? Share your perspective with the editors at feedback@npqmag.org. Reprints of this article may be ordered from http://store.nonprofitquarterly.org, using code 150104.

The Bright Future *of* Community Building

by Bill Traynor

We have not embraced the fact that our principal challenge now may be nothing short of creating newly functional civic environments and finding a way to entice people to step back into public life in a way that feels safe, fun, and productive.

***Editors' note:** This article was originally published as a chapter in the* Community Development Reader *by Susan Saegert and James DeFillipis, Routledge Publishing Inc., 2008.*

In past decades, the emerging interest in community building at the local level has challenged community-based organizations such as community development corporations (CDCs) to broaden their efforts and reconnect with residents and to retool and reexamine their relationship with, and role within, the communities they serve. Practitioners, funders, and policy experts have explored a broader approach to community redevelopment that includes an aggressive effort to redevelop the civic and social infrastructure alongside the physical infrastructure.

But while the field has been engineered to build the physical things place-based communities need—the new homes, community centers, small businesses—and, increasingly, to engage residents in those efforts, we have not created the resources to build the infrastructure of relationships and conditions to reweave a strong community by connecting people to one another and removing the barriers to engagement in public life.

As powerful and effective as community development efforts have been in the past, we have not embraced the fact that our principal challenge now may be nothing short of creating newly functional civic environments and finding a way to entice people to step back into public life in a way that feels safe, fun, and productive. We need new thinking and practice that is based not in the traditions of community in the past but in the pace and flow of the new economy and the age of connectivity.

Emergence of Community-Building Practice and "Community Organizing-Lite"

During the early 1990s, community building emerged as a a supply-side strategy, fostered by foundations and others frustrated with the pace of change represented by the brick-and-mortar CDC approach. The goal: to use the same system that delivered bricks and mortar to deliver "community building." The idea was to reform supply-side institutions to become more responsive to residents.

Born from community organizing and driven

Bill Traynor is a longtime community development professional and the executive director of Lawrence Community Works in Lawrence, Massachusetts.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by a local constituency, many of the early CDCs routinely packaged efforts like youth development, community organizing, and adult education within their real estate development work. For many years, however, biases among funders of community efforts, and among community development practitioners themselves, toward a housing production agenda made sustaining broad, activist approaches difficult. By the early 1980s, however, the CDC movement had become synonymous with affordable-housing development. At best, the major funders of CDCs viewed community-building work as ancillary to the real estate development work of CDCs. Alternatively, the few dollars available for community organizing flowed toward so-called pure organizing groups.

During the 1990s, attitudes shifted, and community-building practices became part of the mainstream CDC movement. Most major national foundations, and many regional and community foundations, sponsored their own versions of comprehensive community-building initiatives (CCIs), experiments in the fusion of community-building practice and community development. Many technical assistance organizations, consultants, and intermediary groups also got involved in this work in large numbers.

Driven by funding from powerful national and regional private foundations, the "CCI era" of the 1990s touched most of the country's major metropolitan areas at one time or another. Though these initiatives differed in many ways, the essential premise was the same: to provide multiyear funding and technical support to existing community-based organizations (CBOs) to create comprehensive community change. These initiatives were somewhat successful in reforming CBOs to take on new work but also severely limited.

First, community-based groups remained preoccupied with a real estate development agenda, which is still viewed as these organizations' bread and butter. The rules were changing and there were few organizations with the energy and capacity to take on the kind of organizational challenges which the community building work posed.

Second, a strong bias persisted, reflected in the labeling of real estate-related work as "hard" and non-real estate-related work as "soft," in that the latter could not be effectively measured or managed. Third, the principal community-building tool of the CCI era was a weak derivative of the traditional Alinsky style of community organizing, sometimes referred to as "community organizing–lite." Genuine Alinsky-legacy organizers don't recognize this practice as "organizing" and were loath to consider the community builders of the CCI era as organizers at all. CDC organizers often complained of a lack of support, direction, and understanding of the work within CDCs, leading to disjointed work and high turnover among organizers in the field.

The limitations of grafting community building onto a complex and fast-moving CBO and the ineffectuality of community organizing–lite proved daunting and led to questions about whether the CCI-era impact was worth the investment. In such an environment, even the best organizer supported by the best CBO had trouble breaking through the disinterest, distrust, and disenfranchisement of many urban neighborhoods. Ultimately, these community builders practiced approaches developed at another time on behalf of community institutions that were ambivalent about the role and purpose of community building. And their efforts took place when cynicism and the habits of detachment had never been more entrenched.

Building Community in Place: Rethinking Views and Practice

An effective approach requires a clear view of the problem, and our principal failure as community builders over the past decade is that we have not fully come to terms with the depth and breadth of the problems faced in community building. Even those efforts that have recognized the importance of rebuilding civic infrastructure have launched strategies that assume a level of civic functioning that simply does not exist. Even community-organizing approaches, whose goal is to effect forms of collective action and representative democracy, depend on some functional level of community infrastructure that is hard to come by. That's not to say that there aren't motivated community members at work or functional institutions at the community level. Even if you can manage to marshal episodes of collective action and get "representative" voices on a board or task force, a disconnected array of individuals and institutions does not equal a functional community.

Community Organizing Is Not Community Building

A major lesson of the CCI era is that whether or not it's community organizing-lite, it's probably not the right tool for the job of rebuilding community. Community organizing—at least the widespread Alinsky-legacy form—is a specific, tactical, and highly structured approach to building power and to confronting entrenched interests. It is fundamentally a political form designed to recruit and mobilize a small subset of the population to serve as a vanguard for change. This method of organizing was shaped by the ideological warfare of political parties and the labor movement in the beginning of the last century and further shaped by the cold war and, later, the civil-rights movement. Today, the best modern version of Alinsky-legacy organizing is entrenched in faith-based institutions, where "faith" serves as a proxy for weakened political and class-based ideology. But whether fueled by faith or ideology, the paradigm of "belonging" in these groups calls for levels of commitment, time, and belligerence for which many don't have the disposition and that many view as foreign to their experience.

This inorganic quality of Alinsky-legacy organizing is not, as some claim, solely because of its call for confrontation, which is admittedly a difficult leap for many people and an extraordinary leap for most CDCs. More troublesome is that the processes and habits we are left with, even in a barely derivative organizing-lite approach, are structured and tactical. The practice winnows "leaders" from the pack, engaging these leaders in narrow and formal leadership roles and encasing them in rigid and ideological structures that are designed to give the institution legitimacy.

Data shows that over the past few decades, people of all classes and races are fleeing structured, high affiliation-level organizations, as evidenced by the difficulty in getting traditional modes of organizing to take hold. In their place, Internet-based, communities-of-connection-type movements have emerged. This twenty-first-century paradigm for "belonging" has *market*-based rather than *political* roots: ideology is replaced by value, and loyalty is trumped by choice. The new kind of community "member" wants to be connected but not obliged, to be part of many but owned by none, and to commit carefully dispensed resources. Low-level affiliation (more akin to "club" membership than to vanguard membership), flexibility, provisionality, and informality are the hallmarks of the new membership organization. In these groups, the evidence doesn't suggest that people are less involved but that they are involved in a different way.

We need a new form of organizing that recognizes and capitalizes on the change in the nature of affiliation and that is designed to meet the challenges of building community infrastructure in place. This new community organizing approach has to aspire—not just to getting poor people represented in the supply side—or to yielding episodic moments of collective action, but to building a functional civic infrastructure that optimizes the aggregate contribution of all residents and stakeholders toward making that place work.

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Building the Demand Side of Community Engagement

I would like to offer an alternative logic model for understanding place-based community building. At the cellular level, place-based community begins with a single relationship of trust and mutual benefit in which one resident or stakeholder shares with another. It is the aggregate of those relationships—along with the loose connections that bind a diversity of them together—that forms, not community, but the *structural framework for community to exist.*

It is the cumulative capacity for collective decision making, problem solving, collective action, information sharing, and most important, the creation and exchange of value (e.g., time, goods, and services)—which this infrastructure facilitates—that ultimately constitutes a community.

At the cellular level in our communities today, fewer peer-to-peer connections exist than in the past. There are far fewer *organically grown* institutions that help these peer-to-peer connections form. And there are even fewer efforts explicitly designed to build the loose connections that help to weave peer-to-peer connections into a productive community infrastructure.

To take on the challenges that stand in the way of building genuine community, we need new thinking and practice. First, we must acknowledge that there is no shortcut to reaping the aggregate benefits of community without making an aggressive investment in building genuine community at the cellular level. At a minimum, this means investing in opportunities and space for peer-to-peer connections. It means enabling new forms of community institutions to emerge based on organic habits of connection and affiliation and exploiting the information infrastructure—the "roads and rails" of opportunity today—that even the poorest residents need to get connected to civic life. In short, this requires new efforts aimed at developing the "demand side" of community, guided by a different paradigm of community and community building—one that sees community as a marketplace and community building as a market-making strategy.

Simply put, community building has to build *habits of engagement* to replace the deeply embedded *habits of detachment* that dominate place.

Community Building as a Populist Economic Movement, Not a Political One

A good starting place is to view community—in even the most decimated places—as a latent marketplace of potential relationships and opportunities. It is governed, as marketplaces are, by the availability of value, choice, and access. In this way, community building can be attacked as a process of *popular economic mobilization* rather than as a vanguard political movement.

Some, including myself, see the formation of strong urban communities as a political act in an economic and political environment that would rather not hear from or respond to poor people, people of color, and their communities. But for those doing the day-to-day work of community building—meeting neighbors, getting involved in schools, or organizing cleanups—it is a simple matter of trying to *maximize the value of place for themselves and their families.* Our concern should be to support residents and remove the barriers to this process. A demand environment, full of people who are succeeding at this, will generate its own channels for political activism and invent its own institutions. In contrast, an environment full of those failing will not have this choice. Turning this latent marketplace into a potent one isn't easy. In today's urban communities, the process of "getting involved" is often difficult, boring, unproductive, and scary, especially for newcomers. So it's not surprising that most people don't and won't get involved. Community building needs to focus on changing this experience by reshaping the interface for thousands of people—in a given place—to meet other people, build relationships of value, participate in civic life, and pursue individual and family economic goals. Simply put, community building has to build *habits of engagement* to replace the deeply embedded *habits of detachment* that dominate place.

Network forms are part of a new wave of thinking about engagement and connectivity in many environments. In marketing, national and state politics, and international movement building, the principles of network forms are taking hold and proving potent. These principles can be applied to place-based community building and create the following habits of engagement.

Fun first. The environment has to be welcoming, friendly, and fun. Community building is not all or even mostly business. It starts not with meetings but with activities like talking and eating. It is relationship building, and the business flows from the strength and the patterns of relationships that are built, creating the *roads and rails* for positive change at the community level.

Low-level affiliation. Unlike traditional organizing that challenges you to be all in or all out, the network seeks an explicitly low level of affiliation and assumes that this activity is but one of the many things you choose to be a part of. It accommodates members' other interests in life: family, faith, work, book clubs, and so on. The approach is more organic and in sync with the affiliation that now marks the information age. Instead of loyalty, ideology, or guilt, the network relies on value to attract members.

Form follows function. The forms of organization that dominate the network environment have to be informal, flexible, and action oriented. A network has to be responsive enough to move capacity where needed. In a network-organizing environment, two important principles shape the form an activity should take. The first is *form follows function*, where the group always asks itself, "What form best suits this function?" The upshot of this habit is that network members are organized in informal, provisional, and flexible groups where positional leadership titles are deemphasized, leaders change often, and the group is decidedly next-step focused. The second principle is *open architecture is best.* The groups embrace the idea that people will come and go, so the group should be perpetually accessible to newcomers by holding onto a group's institutional memory while making the work and the deliberation accessible to new voices.

The connector as leader. In the network environment, leadership focuses more on being a connector than a spokesperson or even a facilitator; the connections mean everything. The more connected you are to other people, information, and opportunities, the more value you can extract from the environment. So in this context, there is no more valuable role than helping others to form and find those connections. Increasingly, members are trained to be "weavers," where a weaver has an honored and acknowledged leadership role in the network environment.

Information-rich. Self-navigation, peer support and exchange, and viral marketing are hallmarks of an effective network environment. For these attributes to be present, the environment must be information-rich. Access to good, timely information is one of the primary value propositions of membership in the network. Building a network environment therefore requires early and significant investment in communication and information technology and the reinforcement of member behavior focused on the dissemination of information. Effective network members are not relationship brokers but transmission nodes.

Interactive spaces. In a network approach, building place-based community shapes new places and forums for "bumping up" time. In a network, you want to create as many opportunities for people to bump up against one another as possible. This is advantageous to information sharing and relationship building. The problem is that opportunities that are too contrived or controlled diminish our critical ability to choose. But we can redesign the spaces and interactions that exist to be more conducive to peer-to-peer connections. Informal time can be programmed into meetings and events. Spaces can be redesigned to encourage intimacy. In many ways, the stoop, the sidewalk, the street, the alley, the next corner are the toughest frontiers for community building in dense urban areas.

Diversity of people and choice. In a network environment, the power of connection is directly related to the diversity of its membership and choice. The network organizer intentionally launches such connections through diverse activities—programs, issues, projects—to attract a variety of people and offer a range of choice for involvement. Organizers also intentionally shape many levels of engagement, enabling and encouraging members to get only as involved as they want to be at any given time.

Using collective and aggregate power. A network environment exploits two kinds of accountability and mobilization mechanisms in order to (1) decide what is valuable to the members, (2) establish values and norms, and (3) articulate demand and move to collective action. Most CBOs and community-building activities rely on the deliberation of small numbers of people to establish credibility and make decisions. The network allows for that to happen as well but creates another dimension: the aggregate articulation of demand. As in a market environment, the network looks at the decisions (i.e., choices) that members make in order to understand what is valuable and what is needed moving forward. Also, the network can act like a consumer collective and use collective demand to shape the services that are available to struggling families. A network community-building approach invests in ways to "listen" to the network effectively to see and hear what members are doing with their time and energy and to understand what members want and value. An effective ability to track network activity is necessary to wield aggregate power.

There is latent power and effectiveness in urban communities that can be unleashed by the potency of robust networks of relationships. New thinking and practices must embrace rather than fear or ignore the challenge of rebuilding civic life. While cellular-level relationships are indeed built one by one, networks of relationships can grow exponentially if community builders and their allies stop worrying about defining the community and get busy in building it.

Have you observed these new community-building principles at work or used them in your own practice? Share your experience with the editors at feedback@npqmag.org. Reprints of this article may be ordered from http://store.nonprofitquarterly.org, using code 150105.

In the network environment, leadership focuses more on being a connector than a spokesperson or even a facilitator; the connections mean everything.

A Leader's Guide *to* Executive Coaching

by David Coleman

Executive coaching provides leaders with tailored guidance on how to manage people and processes to improve organizational results while building the leader's capacity for delivering those results over the long term.

ORGANIZATIONS OFTEN CONFRONT GAPS IN leadership that they can't fix on their own: The deficit may concern an employee whose interpersonal skills need polish, a long-standing staffer whose performance is lackluster, a shift in organizational strategy that requires leadership changes, or a younger worker who shows promise but needs guidance in the vagaries of leadership. With time-strapped staff and a frequent dearth of role models to call on as mentors, nonprofits often struggle with providing the training necessary to address these challenges and are turning to outside help from executive coaches to build internal talent.

Executive coaching provides leaders with tailored guidance on how to manage people and processes to improve organizational results while building the leader's capacity for delivering those results over the long term. But the approach involves an investment of time and money. Consider the following three scenarios as examples of the necessary investment in coaching and of how to judge whether the tradeoff is a good use of professional development dollars.

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Over the past 15 years, **S. Tuck** has been the executive director of a nonprofit providing development services to inner-city youth. With a budget of $500,000 and a staff of six, his agency delivers quality after-school services to at-risk youth. But now he is bored, stagnant, and burned out. At times he thinks it is hopeless to truly transform an entire inner-city neighborhood and work across the boundaries that have separated stakeholders within the community. Still, the city has a new energetic mayor who gives S. Tuck hope that things can change. His new board chair has also shown interest in different approaches. S. Tuck wonders how to get himself moving toward the goals that brought him to the organization in the first place.

Knot Uptuit is the CFO of an environmental advocacy organization geared toward forest preservation that has a budget of $11 million and a staff of 60 nationwide. Knot was brought in just as the previous executive director left the organization. There is concern, however, that this new CFO isn't up to the job. At a recent board meeting, he proposed that the organization needed to tap $500,000 from the organization's reserve for the upcoming year's budget. When he was asked to explain why, he offered justification based on assumptions that didn't make sense. While likeable and hardworking, S. Tuck has superior personal interaction skills but poor number-crunching skills. As the new director, you want to be fair; but you can't risk further disaster with the board.

Meetings between a coach and a leader are structured to fit the learning style of each leader to accomplish particular goals.

Rizn Star is the director of member services at the National Association of Development Directors, a $5 million, 40-person organization that lobbies and provides professional development for fundraising directors of medium-sized nonprofits. Ambitious, Rizn has increased membership by 20 percent in two years. She is strategically brilliant and extremely hardworking. She has ruffled a few feathers in her brief tenure, though, and recently received a less-than-stellar performance evaluation. While she wasn't happy about the feedback, she committed to "fixing" the problem. The current COO is due to retire in two years, and you would like to groom Rizn for the role. But her interpersonal skills need to be polished, and she needs greater visibility with the board.

All three of these leaders struggle with important jobs in organizations that face dynamic changes. Their organizations depend on them, and there is little margin for error. Sending these leaders to a leadership course may be educational but may not target the skills they need to develop or address real-world problems. A workshop may focus on relevant skills but be too short or geared to the wrong level to have an impact on long-term leadership deficits.

Executive coaching has emerged as an effective method to address such leadership gaps. This article explores the benefits of executive coaching for the nonprofit sector as well as situations in which coaching is not the solution.

How Does Executive Coaching Work?

According to a 2004 study by Right Management Consultants, 86 percent of for-profit companies used coaching to sharpen the skills of high-potential leaders.[1] Witherspoon and White describe this kind of coaching as "coaching for development."[2] Other kinds of coaching include coaching for skills (focused on a specific task), coaching for performance (focused on achieving better results in a person's job), and coaching for an executive's agenda (focused on immediate tasks needing accomplishment).

Executive coaching typically occurs during one-on-one meetings or phone calls between the coach and coachee for about 60 to 90 minutes every two to three weeks. Coaching sessions are confidential, goal oriented, and focused on improving organizational results. Coaching targets future behavior more than prior influencing factors and centers on meeting the demands of the leadership role and one's work.

Meetings between a coach and a leader are structured to fit the learning style of each leader to accomplish particular goals. These goals may include improving the ability to delegate, using teams effectively, honing time management skills, developing interorganizational leadership to accomplish a mission, improving performance management, developing senior staff, clarifying and articulating one's vision and goals, preparing for expanded responsibilities, developing executive presence, managing conflict, or leading organizational change efforts.

Challenges for Nonprofits

The leadership issues that arise in nonprofits are often similar to those in other sectors (e.g., delegation, time management, communication, and performance management). Here are some considerations that make coaching particularly relevant for the nonprofit sector.

Accidental managers. Susan Gross, the founding director of the Management Assistance Group in Washington, D.C., observes that many nonprofit organizations are staffed by what she terms "accidental managers." These leaders are visionaries, advocates, or policy experts who find themselves managing people who have little training or experience. Because their rise to leadership is accidental, these leaders often lack the skills that one might expect of a seasoned leader. While true of the corporate sector as well, this lack of managerial skill often exists at multiple levels within the same organization in the nonprofit sector.

Job complexity. Many nonprofit leaders are tested daily in responding to the demands of multiple stakeholders—with consequences for missteps. As Ruth McCambridge writes, "There is no one major stakeholder group with one primary interest at stake. For most of us, we have to watch, weigh, and measure each situation—ask for advice and counsel and communicate like nobody's business—all on a dime."[3] When done right, coaching can be tailored to account for the particulars of a leader's situation while also bringing perspectives from others with whom a coach has worked.

Feedback deserts. While performance feedback is in short supply in all organizations, it's especially absent from smaller and mission-driven nonprofits. These organizations may fear that providing constructive feedback destroys their "family" feeling. In these situations, a coach can work with the sponsoring manager to convey constructive, actionable feedback to a coachee in a meeting with the three parties. This process addresses the feedback vacuum and initiates a path to address the issues identified.

Leadership transition. Whether you believe that over the coming years there will be a calamitous departure of senior nonprofit leaders that requires development of a new cohort[4] or, alternatively, that there will be a more organic transition in which leaders are cultivated from within, organizations must develop leaders in-house and cultivate outreach to attract the right kind of leaders from other sectors.[5] Executive coaching helps minimize the time needed to prepare leaders for broader responsibilities.

A culture of scarcity/sacrifice. In the *Chronicle of Philanthropy*, Michelle Gislason, the projects director for leadership services at CompassPoint Nonprofit Services in San Francisco, noted that the "culture of scarcity/sacrifice" in the nonprofit sector leads to professional development "being the first to go when budgets need revisiting."[6] This tendency to invest in people only during the good times jeopardizes the sector, threatening the loss of experienced leaders as well as training for the next generation. Clearly the sector needs to invest in the professional development of key staff to ensure its preparation for the leadership challenges to come.

Consider Coaching in Context

Like all approaches to leadership development, executive coaching is not a cure-all. Four broad factors affect the return on investment (ROI) an organization receives for its coaching dollar:

$$\text{ROI of coaching} = \text{Importance of role} \times \text{teachable moment} \times \text{teachability through coaching} \times \text{energy for learning}$$

The return-on-investment relationship is multiplicative. The more that each of these areas is relevant, the higher the ROI, while the absence of any one of these elements can indicate that coaching is not appropriate. Higher levels of one factor can compensate for lower levels of another. But if any factor is missing, the ROI of coaching is likely to be missing as well.

- *The coachee's role.* An organization should consider the importance of the potential coachee's current or future *role* to an organization's success.
- *The presence of a "teachable moment."* An individual's situation must create readiness for coaching. This readiness may be created by forces external to an organization (e.g., economics, technology, or legislative issues), forces internal to an organization (e.g., clear feedback offered, staff changes that allow for change in responsibilities), or personal circumstances (e.g., a divorce or a desire to advance an organization's mission or one's career).
- *The teachability of a skill through coaching.* Some domains of knowledge do not lend themselves to coaching and are more easily taught through courses, such as accounting or IT skills.
- *Openness to learning.* A person's natural appetite for learning must be high, and a coachee must be motivated to address the current situation.

When Not to Use Coaching

Here are specific situations in which coaching should *not* be used:

- *When a person's fit for a task is wrong.* Instead the person should be reassigned or terminated.
- *Once a step has been taken to terminate the coachee.* The risk is that coaching will always be viewed as a first step toward firing staff.
- *When systemic issues cause poor performance.* When a business model is unclear, an organization is too dependent on one funding source, or when management is poor from top to bottom, these systemic issues must be addressed using coaching as an adjunct, if at all.
- *When an organization as a whole is in a crisis.* In such a situation, coaching is at best an adjunct to a larger intervention.
- *When an honest conversation between a boss and a coachee about the need for change has not occurred.*
- *When an organization wants an independent evaluation of an executive's suitability for his job.* Such an evaluation may require the assistance of an organizational psychologist.

Like all approaches to leadership development, executive coaching is not a cure-all.

Best Practices for Maximizing Coaching Results

1. *Confidentiality.* Coaching sessions are confidential between the coachee and the coach. The primary purpose is development, not evaluation.
2. *Organizational alignment.* Relevant organizational managers are involved in setting the goals and process for coaching. This lends the credibility and support of an organization's structure to the process.
3. *Collection of 360-degree stakeholder feedback.* Independent information from multiple sources (a boss, peers, and direct reports) is collected for assessment and to set development goals. If the coachee has an externally facing role, peers outside the organization but in the same sphere as the coachee are included in the 360-degree feedback process.
4. *Participant feedback.* Following the 360-degree review, participants are thanked for their input, told what the coachee has learned, and informed of the changes the coachee will make as a result of feedback.
5. *Development plan or learning contract.* A document should be created with no more than three to five areas on which to focus.
6. *Frequent meetings.* Coaching meetings should be held every two to three weeks to establish a connection and rhythm for the coaching relationship.
7. *At-home assignments.* Relevant "homework" assignments should be made for practicing skills between coaching sessions.
8. *Agenda setting.* Coaching sessions should begin with the creation of an agenda in real time with input from the coach and coachee.
9. *Focus.* Each session includes a focus on immediate concerns (coaching for the executive's agenda) and on a strategic area of development (coaching for development).
10. *Trust.* Events that might interfere with trust are addressed directly by the coach and coachee soon after they occur.
11. *Duration of engagement.* The coaching process should involve a specific length of time with the option for renewal. Typically, an initial engagement lasts for six months, with optional renewals for up to 18 months. Initially meetings should take place every two or three weeks for the first four months and once a month thereafter.
12. *Gauging progress.* Progress is assessed on three to five development goals using a brief survey, with numerical designations of progress or deterioration (e.g., +3 indicates improvement, zero indicates no change, and -3 indicates deterioration).
13. *Inclusion of sponsor.* The organizational sponsor is re-engaged upon contract renewal and contract conclusion to provide input and suggestions.

Coaching can bring focus and speed to organization-wide changes in how senior staffers manage people and tasks.

- *When an employee has serious personal problems.* Problems such as chemical dependence need to be addressed separately from engaging a coach.

When to Use Coaching

Here are scenarios in which coaching is an excellent investment.

- *Aiding during transition.* Coaching can help when the scope of an employee's responsibilities change during an organizational transition (e.g., when an executive director is hired to lead a larger organization than he had previously).
- *Speeding organization-wide change.* Coaching can bring focus and speed to organization-wide changes in how senior staffers manage people and tasks.
- *Supporting a strategic shift when introducing a new skill set to an organization.* When an advocacy organization hires a communications director for the first time, for example, existing staff and the new director should be coached.
- *Aiding with organizational intervention.* Coaches may help during a targeted organization-wide intervention (e.g., seeking to improve how performance appraisals are conducted).
- *Tapping employee potential.* Coaches can help develop and support good performers whose potential is not fully realized.
- *Exploiting learning opportunities.* Coaching can take immediate advantage of times when employee motivation is high because external, internal, or personal factors have created a teachable moment in which leadership skills can be taught.

Critical Components of Coaching

For coaching to have an impact on the person and an organization, four components must be present:

- organizational alignment;
- independently obtained, confidential, and anonymous information about the person being coached;
- a positive rapport and trust between the coach and coachee; and
- consistent and frequent coaching sessions.

Organizational alignment. Organizations exist to get results. But to maximize the effectiveness of coaching, organizations need to establish (1) clear alignment between the goals and

Selecting a Coach: Questions to Ask

Sample question for a coach: *Describe the steps in a typical coaching engagement.*

Rating the response: What is the coach's approach like? Does he have a process in mind? Does it seem relevant to your situation? While the steps may not be completely linear, you don't want a coach who cannot describe how he works.

Question: *Which kinds of clients have you worked with most? Which kinds do you work with best?*

Rating the response: Is the coach's experience relevant to your situation? Consider whether relevant prior experience matters. Be wary of anyone who says he works equally well with everyone. Either this coach lacks self-awareness or isn't telling the truth.

Question: *Suppose I want to work on developing a skill (e.g., developing leadership style, establishing accountability, or grooming successors). How would you help me develop that skill?*

Rating the response: Look for multiple approaches and flexibility in thinking. Does the prospective coach suggest resources for learning? Will this person shadow you during meetings and provide feedback? Will this person role-play through real situations? Will this person provide examples from work with other clients (anonymously, of course)? Does the coach make suggestions adapted to your learning style or context?

Question: *How long is a typical engagement?*

Rating the response: Be skeptical of unlimited engagements or engagements that seem too short or too long relative to the change you hope to make. A typical initial coaching engagement is six months, with the option of renewing once or twice up to a total of 18 months.

Question: *Are you flexible with your fees for a nonprofit? What does the fee include?*

Rating the response: Some coaches charge by the hour, others charge for a package that lasts for a certain period of time. Hourly rates range from $150 to $500, depending on the experience of the coach and whether the coaching takes place on site or on the phone. A typical six-month package ranges from $4,000 to $30,000. A more limited engagement includes two phone calls per month with little or no stakeholder assessment. A more comprehensive package might include two or three face-to-face meetings each month, unlimited phone and email contact, an extensive 360-degree interview process of 10 to 15 stakeholders, coordination meetings with organizational sponsors, psychological assessments, and a follow-up survey with stakeholders. Travel and out-of-pocket expenses are generally additional to a quoted fee.

Question: *Do you have questions for me?*

Rating the response: You should expect a coaching candidate to have questions for you, such as, "What does success look like? What results do you want from coaching?" as well as questions about how you want coaching to affect your organization, how you learn best, and your concerns about the coaching process. Most important, you want a coach to ask substantive questions that clarify your thinking about the process and that indicate how this person will work with you.

Question: *Can you provide references?*

Rating the response: Most coaches are hestitant about providing references. But a coach can at least provide a coaching program manager as a reference with whom you can speak about his work. Or a coach may have to check with a reference on whether it's OK to be contacted. References may be less important if a coach already comes highly recommended.

Question: *How do you stay current in your field?*

Rating the response: Does the candidate attend conferences, read books, or participate in collegial groups? Some clients find it helpful to rank prospective coaches on a five-point scale on various skills: listening ability, ability to ask good questions, ability to identify underlying patterns in a coachee, ability to connect coaching work with organizational goals, ability to adapt an approach to a situation, and comfort and ease in interacting with a coachee.

The composite of answers to all the above questions and your ratings enable you to select a coach who will work for you.

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desired organizational results of coaching and (2) alignment between the existing organizational structure and the coaching process. To achieve such alignment, those considering coaching need to ask, "What is the organizational reason for working on *X* issue?" If there is no clear business reason for coaching on the issue, coaching may not be appropriate to address the problem. One aligns coaching with the existing organizational structure by involving a coachee's superiors, sometimes even board chairs. This establishes legitimacy for the coaching process

By reflecting on how to recommit to the tasks ahead and by learning new things, coaching can contribute to a renewed sense of engagement in organizational mission.

and ties the coaching exercise to existing organizational structure and goals.

Independent information. Organization development guru Peter Block has said, "We are all born on the wrong side of our eyes" suggesting that others can often see things more clearly about us than we can see about ourselves. For the coaching process to work and have lasting impact, a mechanism for getting independent information about the person being coached is crucial. Such information gathering is typically accomplished through a 360-degree feedback review. Information is gathered confidentially and anonymously about an individual from his boss, peers, and direct reports through a survey or an interview process and is then presented to the coachee. This feedback-rich information may provide alternate leadership approaches that might not have been apparent previously.

Rapport and trust. In coaching, chemistry matters. Because the issues that coaching addresses involve the strategic (e.g., implementing a cultural change, creating a process to develop a new strategy) and the personal (e.g., addressing burnout, developing executive presence), participants need a strong rapport, and the coachee needs to establish trust in the competence, neutrality, and helpful intentions of the coach. Trust begins with clear agreements about confidentiality and extends to an appropriate balance of supportiveness (e.g., praising attempts at new behaviors) and challenge (e.g., nudging coachees to meet set goals). The balance should not be too heavily weighted in either direction.

Consistent and frequent meetings. A coachee needs to invest time if he wants results from the process. To establish a working relationship and a rhythm for the sessions, frequent meetings are particularly important. There should be enough time to accomplish the goals set between sessions, but not so much time that catchup is required.

The Costs and Benefits of Coaching

There are three primary costs of coaching: time, money, and comfort.

Coaching takes time from already busy schedules, and many question whether they have the time for such a "self-indulgent" endeavor. Coaching can also be costly, with average costs for six months of coaching ranging from $4,000 for a limited engagement to $30,000 for a more comprehensive program. Finally, coaching can threaten the familiar and comfortable. Coaching commits coachees to make changes that initially require more effort and energy than doing things the way they have in the past.

Benefits

The primary benefits of coaching include the following:

- gaining new perspectives on oneself and one's situation;
- acquiring new skills;
- building confidence;
- retaining valued employees;
- developing new leaders; and
- bringing renewed energy to your organization's mission.

Coaching can provide new perspectives on familiar tasks and situations. Katherine Lauderdale, the senior vice president and general counsel of PBS, expresses it this way: "Coaching [created] an objective filter on the people issues I deal with. This led me to get more quickly to the essence of situations and often to new and different ways to approach them."

Coaching frequently teaches new skills. Sometimes, however, the process refines a skill that basically works but could use fine-tuning. Jon O'Brien, the president of Catholics for Choice, says, "Coaching is not a crutch or a substitute for your own ability to lead. It has given me a better sense of when to push or pull, listen or talk while plugging me into the latest and best thinking in strategic management theory and practice." Coaching also helps organizations retain valued employees who want new opportunities and self-development. Similarly, providing coaching can help develop the leadership bench strength in an organization by helping technical experts prepare for expanded roles and responsibilities.

Finally, coaching can provide renewal for those who have labored for a long time on challenging missions. By reflecting on how to recommit to the tasks ahead and by learning new things, coaching can contribute to a renewed sense of engagement in organizational mission.

Finding and Funding a Coach

The next question is "How do I find an executive coach who will work for me?" As with all professional services, the best starting point is to ask colleagues for recommendations. Interview at least three coaches using some of the questions included in "Selecting a Coach: Questions to Ask" on page 35. As you talk to prospective coaches, determine whether (1) the coach's experience is relevant to your coaching goals; (2) you believe the candidate will support *and* challenge you as you work together; and (3) the coach's approach can be tailored to your situation.

Funding for coaching can be tricky. Start by asking current funders to support a proposal for leadership development. Individual donors often support coaching as a discrete project, particularly if they have benefited from a coach themselves. Several foundations—including the Annie E. Casey Foundation, the W.K. Kellogg Foundation, and the David & Lucile Packard Foundation—support coaching or research on coaching for nonprofit leaders. The Kellogg Foundation has initiated the Coaching and Philanthropy Project to assess and promote the use of coaching within the nonprofit sector.

You can also ask your board to provide coaching funding as a bonus for exceptional performance. A recent initiative by the Grantmakers for Effective Organizations (GEO) encourages foundations to provide general operating support to the nonprofits they fund. GEO recognizes that by supporting leadership development, foundations protect and enhance the investment they have made in their funded organizations.

What Would You Do?

Returning to the three scenarios with which we began, which candidates are most likely to produce a return on a coaching investment?

S. Tuck, the long-serving executive director of an inner-city youth development organization, is a good investment for the coaching dollar. He plays a critical role in the life of his organization. The election of a new mayor and a new board chair willing to try some new ideas have created a teachable moment. The skills he needs are coachable and S. Tuck is ready to be reengaged with his organization's mission

Knot Uptuit, the CFO who choked when challenged by the board on his numbers, would not be a wise investment of coaching dollars. This candidate is missing number-crunching skills and good judgment. Neither of these is likely to be taught through coaching. While one could argue that three of the four factors for coaching are present (criticality of role, a teachable moment, and energy for learning) and might suggest good ROI, the fourth factor (teachability through coaching) is low, making a coaching investment not worthwhile.

Rizn Star, the current director of member services, would provide excellent ROI on coaching dollars. The COO role is critical to the success of this organization. Rizn's recent performance evaluation and the upcoming retirement of the current COO have created a teachable moment, and her interpersonal style is amenable to change through coaching. Finally, Rizn's deep commitment to learning and fixing the problem suggests that she is a good candidate for coaching.

Individual donors often support coaching as a discrete project, particularly if they have benefited from a coach themselves.

Endnotes

1. Paul Michelman, "Methodology: Do You Need an Executive Coach?" *Harvard Management Update*, vol. 9, no. 12, December 2004 (http://hbswk.hbs.edu/archive/4853.html).
2. R. Witherspoon, R.P. White, "Executive Coaching: A Continuum of Roles," *Consulting Psychology Journal*, vol. 48, no. 2, 1996.
3. Ruth McCambridge, "Groundbreaking Study: Nonprofit Leaders Excel," *Nonprofit Quarterly e-newsletter*, issue 98, January 2008.
4. See for example, Annie E. Casey, "Community Based Organizations and Executive Leadership: A Survey of Annie E. Casey Grantees," 2001 (www.aecf.org); and T.J. Tierney, "The Leadership Deficit," *Stanford Social Innovation Review*, 2006.
5. Many initiatives are already under way to address this transition, such as the Urban Libraries Council's Executive Leadership Institute, a national level program combining action learning and executive coaching (www.urbanlibraries.org) , Rockwood Fellowships sponsored by the Rockwood Leadership Organization (www.rockwoodleadership.org), and Ashoka Fellows (www.ashoka.org).
6. Michele Gislason, "Coaching for Nonprofit Leaders," the *Chronicle of Philanthropy*, October 10, 2007 (http://philanthropy.com/live/27007/10/kwak/).

Have you or your organization ever used a coach? Share your experience with *NPQ* at feedback@npqmag.org. Reprints of this article may be ordered from http://store.nonprofitquarterly.org, using code 150106.

The Nonprofit ED's FIRST 100 DAYS

by Oliver Tessier and Ruth McCambridge

Your staff will have an urgent itch to find out if you're someone with whom they can work and whether their futures are secure.

As an incoming leader, you are the subject of unrelenting scrutiny while on one of your steepest learning curves. Much like the first 100 days of a new presidency, you will need to exhibit vision before you have answers, to be solid yet porous enough to absorb a sea of information, and to inspire a bit of awe without sacrificing accessibility. Above all, you will need to connect with those you will lead to earn their trust and cooperation. Meanwhile, your staff will have an urgent itch to find out if you're someone with whom they can work and whether their futures are secure. Internal and external observers will watch your every action and reaction. Challenging? Undoubtedly, but you were chosen because you're up to a challenge. Let's look at ways to get the best return on your huge investment in the success of this moment.

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Arm Yourself with Information

Ideally you have already looked at financial information, annual reports, strategic and program-related information, and also familiarized yourself with the nonprofit's primary constituents. Beyond making immediate communication with your staff easier, a rich background in the agency's history indicates that you know what's important to your staff and where it has put its efforts over the past few years.

Few things are more valuable than knowing where an organization stands in terms of its financial picture. This gives you the opportunity to spend your first days listening and learning rather than implementing layoffs or suspending pensions. The board of a small literacy program that hired a bank executive who wanted to change careers didn't know what it didn't know—and, to paraphrase Olympia Dukakis in *Moonstruck*, that was a lot. The cash situation was so bad that the new executive could not make the first payroll after being hired, and she went through an excruciating first few years. She focused a great deal of her attention on

For this organization, such early decisions about how to handle leadership had long-lasting implications that were both positive and negative.

making a broken financial model work. Luckily the staff included several longtime employees who understood their jobs, which gave her time to negotiate out of an expensive lease and and then work through broken relationships with funders. Wisely, she talked through decisions with staff and board.

When cash was tight, one of this executive's tactics was to pay herself last. This symbolic move delivered a message to the organization about what people could expect from this new leader (see "Eleven Questions for a New Leader" on page 42). Whether or not people agreed with the act itself or with her making it public, it was a powerful statement.

This executive admits to not having done some things well, however, including not asking funders for help during a crisis. Keeping quiet about the problem distanced her from funders, raised questions among them, and forced the organization into a more extended period of frugality than might have been necessary. For this organization, such early decisions about how to handle leadership had long-lasting implications that were both positive and negative.

You Can't Anticipate Everything

No matter how much information you gather beforehand, you'll likely find surprises that test your mettle in unexpected ways. One woman said that as she prepared the annual grant application for her organization's primary funding source, she realized that the statistics from the past year had no relationship to the statistics cited in the prior year's grant application. She called the old director, whom everybody adored and who was terminally ill, and asked, "What am I doing wrong?" "Oh, I always lied about those," he said, "It doesn't matter." Another new director found that the board had neglected to inform her about a pending—and serious—sexual harassment suit.

Yet another director, recruited from the board, knew everything there was to know about her new organization. She knew the nooks and crannies of cronyism and the lack of accountability, and she also knew the desire of the staff to do the right thing. She was motivated by the community's faith in the agency, and she sensed that, with patience, the situation could be handled. What she did not anticipate was that the local United Way would object to her move from a long-standing position on the board to the executive director position. The agency was put on probation until she proved herself. Not the most auspicious entrance, but it made the board angry enough to unite behind her leadership. In the end, it was a slap and a gift.

An executive who had served at the helm of several agencies related this story, which may resonate for many. "I was told that my predecessor was inaccessible and distant from the staff, which numbered in the hundreds," he recalled.

> So my first task was to go through the entire place, meet everyone, shake everyone's hand, let them know that I would be open and approachable. When I came to one unit, a woman there waved me over to her. I smiled and reached out my hand, which was hardly her interest. She looked at me and said, "I know that you'll try to get rid of me, just like your predecessor did and his predecessor did too. And just like I'm here now, I'll be here when you're gone too." [Taken] aback, I said something like, "Thanks for the advice." And she was still there when I left office four years later. I had encountered my first taste of the deep-seated culture of the agency that was, like this staff person, more than likely destined to outlive me.

Sometimes we have to work hard to remain calm, confident, and accessible. "Going to the balcony"—periodically taking ourselves out of the immediate action and reflecting on how the system operates—is a useful approach. It's the mark of a good leader, and if done well, it inspires confidence.

It's important to have a few trusted outside confidants to test your perception and ideas and help recognize patterns. Choose wise people who understand the kind of organization you have joined, who know your blind spots and analytical failings, and who will both challenge and support you.

Trying to Get It Right

When David Schutt arrived at the Society of Automotive Engineers International (SAE), he was new to the organization, the town, and the position of CEO. A strategist by nature, Schutt realized that everything he said and did would lay the foundation for relationships that would sustain his future and the future of the organization. He advanced his start date to avoid being out of town at a conference on his first day of work. "What message would it send for me to be away from the office on my first day?" he asked. Within weeks, Schutt integrated himself into his team by meeting individually or in small groups with every SAE employee. "I wanted to be in the same room with them to learn what's on their minds and to let them know what I'm thinking," he explained. By offering immediate evidence that he's on the ground with his staff, Schutt indicated that he's interested in them, approachable, and that he expects interaction.

Schutt conveys optimism and enthusiasm; he believes that those on his staff will do great things. He will undoubtedly find opportunities to express that confidence, but regardless of what he says, people are likely to perceive what he feels. Communications expert Martha Miller cites evidence that our "internal expectations leak out through our nonverbal communication." Since Darwin's *Expression of the Emotions in Man and Animals*, first published in 1872, scientists have theorized that facial expression and gesture complete the story conveyed by speech. Humans are extraordinarily adept at testing for consistency between what they hear and what they observe. If we sense a discrepancy, it needn't rise to the level of conscious awareness for us to know that it's not safe to let down our guard. When it comes to someone with as much influence over our lives as a new leader, our attention is fully aroused.

When you first join an organization, your tasks are to seek to understand, to insert yourself into existing social networks, and to get a feel for the culture at work.

'Tis Better to Be Silent

When you first join an organization, your tasks are to seek to understand, to insert yourself into existing social networks, and to get a feel for the culture at work. Spend time with people, comfort them with information, laugh with them. They'll be anxious. You may want to ask people to tell you the best things they've achieved or perhaps the silliest things they have done at the agency. This prepares you for hearing stories from the perspective of others and gives them ownership of their concerns. Employees at every level will have stories to explain what you see in the organization itself. Some may be cautionary tales, such as stories

Eleven Questions for a New Leader

1. How should I sequence these first 100 days?
2. Am I confident that I understand the organization's current situation? What should I know about my new organization that I have not yet asked?
3. What are this organization's top three opportunities and challenges? To what extent is there agreement, dissent, or indecision about priorities?
4. Which relationships are most critical for me to sustain? Who would expect to hear from me early in my tenure?
5. How should I allocate my time among internal and external relationships? How do others view this distribution?
6. What information and sources of information do I need to master to understand the field and environment of this organization?
7. Does my newness open avenues for changed relationships, new support, or repaired bridges?
8. What symbolic moves could I take to denote a new era?
9. Who else applied for this position whom I should now call on?
10. What might I later regret that I didn't do early on?
11. What weaknesses in my own personality or style do I need to compensate for?

about the previous director. These folks are trying to get your adherence to their interpretation of things, and while it is important to have this information, you cannot take it all at face value. Take your time processing information. Resist the lure of aligning yourself too closely, even with board members, and go for a common story once you have been there long enough to be certain it's true. Most important, avoid criticizing your predecessor. It is tempting at times, but it sends a bad message.

As you listen, try to discern the "song beneath the words," as Ronald Heifetz calls it. Wise leadership evolves from seeing these patterns. Once you see a pattern, you can choose to reinforce it or break it. And you can choose your timing and make decisions about which organizational patterns are most important to address. Again, this requires composure as the situation is revealed to you.

While you're getting your footing, embrace your ignorance. By asking for your team's help in creating solutions, you affirm that you're in it together. Balance is important, though. While you and your team are indeed in it together, you aren't equals. You are the leader. This is why confidence and humility need to be evident. Your staff will be reassured by your invitation to work together, but they want the security of knowing that you're going to lead. You can exhibit this leadership role by articulating your vision, feeding a coherent picture back to them once you have the lay of the land, and inviting them to continue to embroider on the view you now have.

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In the context of nonprofit organizations, you will also need to work extensively with external partners: funders, constituents, public officials, and other organizations that have important perspectives on the organization, what it has achieved and how, and what it needs to do going forward. Approaching these partners early and often ensures that you get the complete picture and that you factor in myriad views as you shape the future path of the organization.

Your questions to staff send a message. Thomas Neff and James Citrin's *You're in Charge—Now What?*[1] draws on the experience of outstanding CEOs to identify questions like these to pose to new staff: "What do you most want to preserve about the organization? What do you hope I'll do? What do you fear I won't do? What do I need to know? What advice do you have for me?" Consider the balance of external information and emotional content these questions invite. Asking consistent questions among different groups gives you valuable comparative data; meanwhile, the questions you choose signal what's important to you. If you listen to the tapestry of answers, you learn about organizational issues (where the board fits, where conflicts arise, what funders do), as well as those you talk to and the work culture to which they are accustomed. This gives you a map or blueprint for action.

And you're not the only one gathering information. Your new colleagues have reason to be more than casually curious about you. If you meet with one program director more often than others, if staff meetings involve your reports to staff with only a nominal invitation for questions, if you continually talk as though your assumptions are shared, your behavior will be noted and stories will be built around that behavior.

Identifying how you want to begin your leadership helps immensely, especially if it calls all parties to their highest aspirations. Nancy Petrisko, executive director at the BlackRock Center for the Arts, used her passion for the mission to explain herself and to energize staff. "I told them right away that what excites me is the future, my vision of where we'll be able to go. I'm better at getting the big ideas across than the little ones," she said. "My job as a leader is to keep us all focused on what we're about. I count on you to figure out how you'll contribute to getting us there." To have staff take responsibility for reaching goals, Petrisko urges them to look for solutions themselves before they come to her. "I want to encourage the team to be self-sufficient. I'm there if they need me, but I want them to rely on their own creativity." This sends a clear message about a preferred style of management. But once the message has been sent, we need to watch the outcome carefully. Does your style mesh with staff expectations? If not, can they adjust, or do they need help? Are your ideas and approach right for the situation?

No matter how clear your vision or how careful your plan, some of your expectations may crash on the rocky reality of your new situation. Flexibility and patience are key. As you gather knowledge and build political capital, your ability to assess and forecast will improve. When you hear your team's concerns, ideas, and interests, some easy wins will present themselves, as will some serious flaws. You may want to respond immediately, but bide your time. American Moving and Storage Association CEO Linda Darr advises, "Don't underestimate the people on your team. Get to know them. Give them long enough to prove themselves. I listened and watched for a hundred days before I made any major changes."

Of course, some members of an organization may not be the right ones to see the organization to the other side. Some of the hardest decisions for incoming leaders involve people, and sometimes leaders must change roles or make the decision that some employees are simply not right for the job ahead. How you handle these decisions tells the organization a lot about you, so be conscious that your actions will set the tone for the future. Don't let that paralyze you, but move strategically and with care, particularly if the situation is not urgent.

If you're prepared to lead before you have all the answers and you're willing to ask questions with genuine curiosity, people will see you as an engaged.

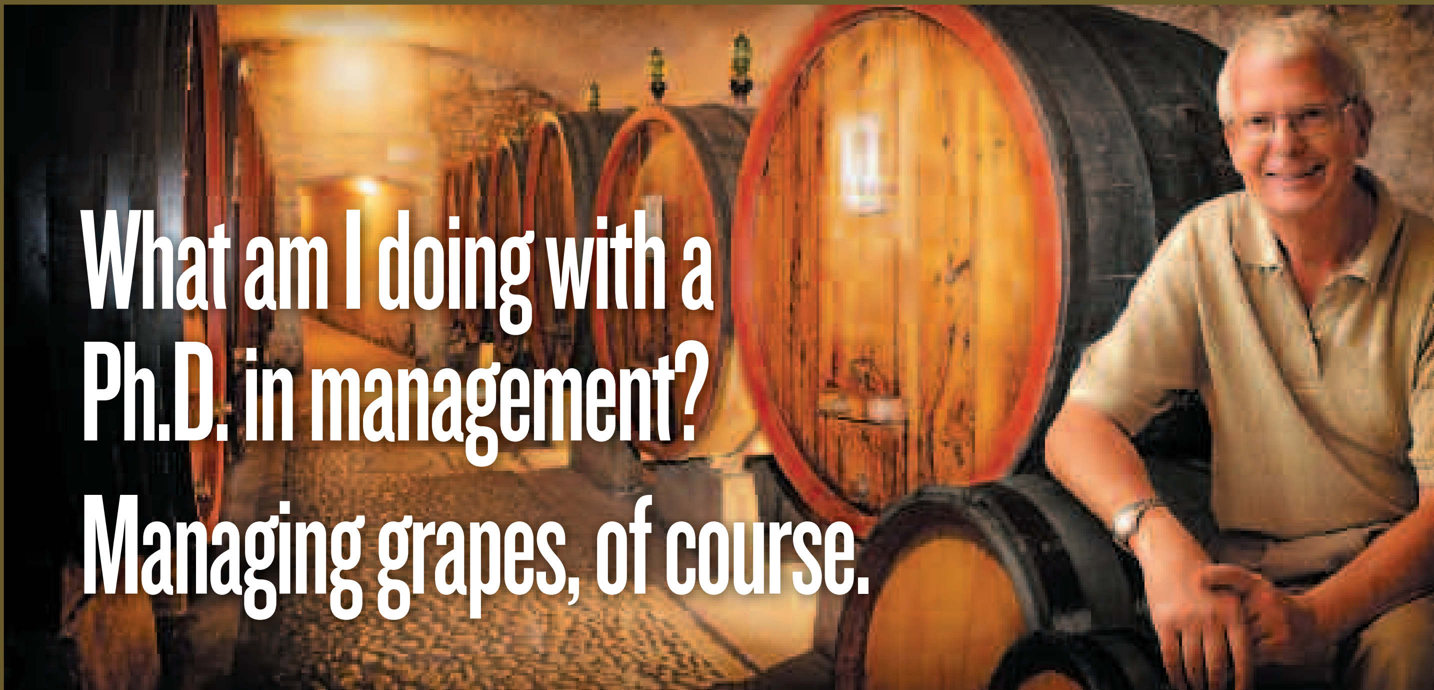
Sociology tells us that revolutions occur when expectations are raised and then dashed. Be careful to commit only to what you know you can deliver. Until you're on solid ground, it is wise to promise process rather than outcomes. "I am going to take on building the donor base" may be safer than "I will increase our donor base by 20 percent" unless you know the situation well. Offer time frames you're confident you can meet; no one benefits from a missed deadline.

If you're prepared to lead before you have all the answers and you're willing to ask questions with genuine curiosity, people will see you as engaged. Listening actively makes your interest in your staff even more evident and opens the door to shared, fresh ideas. Understanding the power of gesture amplifies your ability to send and receive messages. You don't have to focus on everything at once, but thinking about these issues and raising their profile in your operating system primes you to build relationships that work. "I was initially met with fear," says Linda Darr. "I could tell people were very uneasy because I'm so different from the last CEO. But the fear soon changed to anticipation and then to excitement. Now all people talk about is opportunity."

Endnotes

1. Thomas J. Neff and James M. Citrin, *You're in Charge—Now What? The 8 Point Plan*, New York, Crown Business, 2005.

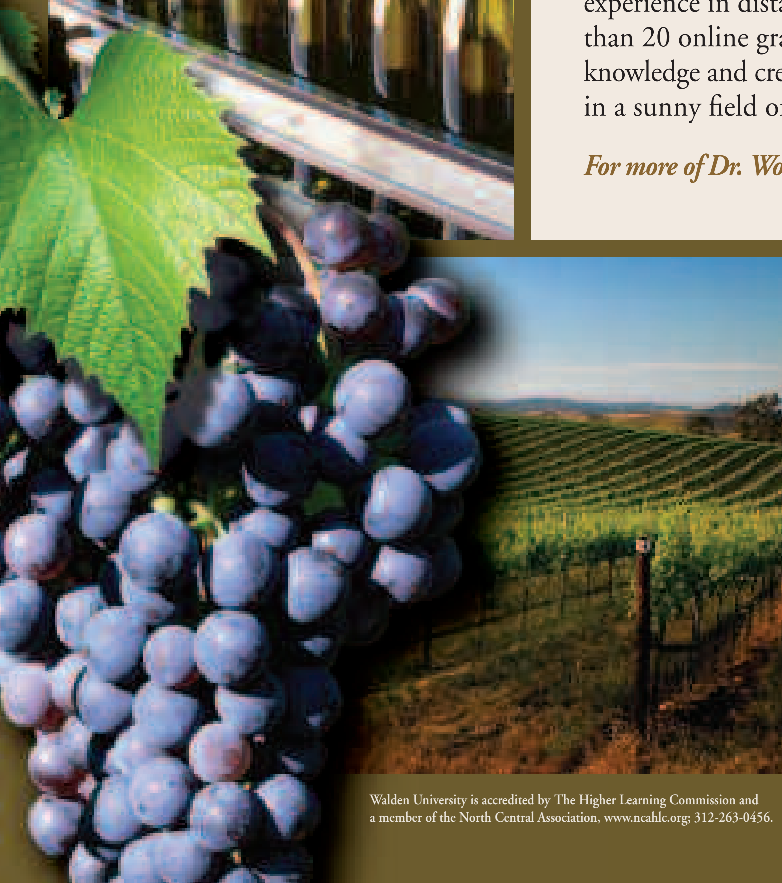
Do you have an exeperience as an incoming leader that you would like to share? Write us at feedback@npqmag.org. Reprints of this article may be ordered from http://store.nonprofitquarterly.org, using code 150107.



Jean-Pierre Wolff, who earned his Walden Ph.D. in 1998, dreamed of owning a vineyard. So in 1999 he left his electrical engineering business and bought a small California vineyard and winery. Now he's a successful "winegrower," noted for both his four-time gold-medal-winning Petite Sirahs and the ecologically friendly manner in which they're made. Dr. Wolff credits his quick career transition to the skills he obtained in Walden's online doctoral program. "You learn how to learn," he says. "It changes how your mind processes information."

Walden University is an accredited institution with nearly 40 years of experience in distance education. However you define success, our more than 20 online graduate and bachelor's programs will help you gain the knowledge and credentials to achieve it. Just as Dr. Wolff is finding success in a sunny field of grapes.

For more of Dr. Wolff's story, visit WaldenStories.com.



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The Evolution of Nonprofit Management Programs

by Judith Millesen

Today, students who want a nonprofit management education face a dizzying array of approaches, programs, and degrees from which to choose. What's a student to do? To provide a sense of the array and level of changes in the field, we asked educators from various programs across the country about student interests, current trends, unique programmatic elements, curricular changes, the challenges of delivering quality programs, and their predictions for the future of nonprofit management education. While little consensus emerged from the three teleconferences we conducted with 13 interviewees, it was clear that the field remains as dynamic as has been reported previously in *Nonprofit Quarterly* articles, and the situation will likely continue for some time. Here are four highlights that emerged from these discussions:

- Undergraduate students are increasingly sophisticated in their knowledge of and experience in the nonprofit field.
- Both students and faculty seek ways to link the discipline's theory with practice.
- Nonprofit management education continues to face formidable challenges, including how to accommodate student demand given constrained resources and the need for technological innovation.
- In the the future, nonprofit management education is likely to be shaped by continued advances in innovative delivery of course content, an ongoing interest in organizational sustainability, and a need for better under-

Undergraduate students are increasingly sophisticated in their knowledge of and experience in the nonprofit field.

Photo © Peter M. Crosby • pcrosby@san.rr.com standing of the sector's role in community engagement.

Growing Demand

Identifying the proper academic "home" for nonprofit management education remains an unresolved issue with two underlying questions. First, is nonprofit management a true academic discipline, or is it a professional program like law school? And second, are students better served if nonprofit management education is offered through, for example, business schools, schools of public administration, or social-work programs ? Students say their principal concern is not where classes are offered, they simply want course options that focus specifically on the nonprofit sector. According to one university administrator, "Undergraduates in the business school staged a revolt and basically demanded that an undergraduate major be developed and offered in the business school."

It was also clear that students have become more comfortable in pursuing a graduate degree specifically designed for nonprofit management rather than choosing a traditional degree program such as an MBA or a master of public administration (MPA). The dean at a school that offers a master in management of nonprofit administration (MMNA) explained it this way:

> Students are now questioning, "Well, do I want an MBA with some class work in the electives for nonprofit [education], or do I want to take the degree [MMNA] that was set up for nonprofits with some MBA classes? . . . I've seen a change over the past four years. . . . Students are more likely to risk now than maybe they were in the beginning. . . . Maybe the MBA has a bit more cachet, but I think people are realizing that you really do need to get a degree that has the kind of content that is specialized for nonprofits.

Sophisticated Undergraduates

Just 15 years ago, few academic programs offered classes in nonprofit management. Not surprisingly, few students had knowledge about the sector or how to develop a career in nonprofit administration. But that landscape has begun to shift. Today many undergraduate students enter college with some knowledge about nonprofits—they may have experience in the sector because of a service-learning project in high school, a secular or faith-based volunteer experience, or because of their work for a nonprofit—and this is particularly true for international students enrolling in nonprofit management classes. Consider this anecdote:

> We were going around and doing the obligatory introductions [on the first night of class]. . . [and] one young man said something to the effect of 'Forgive me for the time lag, but I am just back from Africa, where my international NGO [nongovernmental organization] received a land contribution for a sustainable school." He was 18.

The faculty we spoke with said that nonprofit management education provides students with a way to harness their passion for service, to bring structure to the desire to help, and to get a job doing something they love. An interviewee involved in primarily undergraduate education at her university, for example, explained that students in the school's nonprofit management program have transferred from other disciplines, including psychology, sociology, nursing, and education. A faculty member at another college described the influx of art students into nonprofit management classes. "Students are trying to think ahead to their career, and they are seeing a match between those interests they have as potential artists and the career opportunities that the nonprofit sector provides."

Linking Theory with Practice

Graduate students report several reasons for seeking graduate degrees. Some are fresh out of undergraduate study and want to learn more about a field in which they have a strong interest. They want to "change the world," and view forming a nonprofit as the first step. Others are interested in nonprofit management education to expand their knowledge (as illustrated by the interviewee comment "I've been flying by the seat of my pants for the last 20 years. . . . So now tell me, what is the right way of doing it?"). Still others seek career advancement by pursuing a program in nonprofit administration to demonstrate greater content knowledge. "Credentialing is a very important consideration to a

Students say their principal concern is not where classes are offered, they simply want course options that focus specifically on the nonprofit sector.

number of students we have enrolled in our programs, particularly our executive programs, which are targeted to mid-career professionals." But despite these varied reasons for attending graduate school, a common thread is the strong desire to develop "applied skills." As one interviewee remarked, "Students want practical skills, they want to understand the theory, and they want to understand how really to bridge between theory and practice. They want a tangible outcome when they leave. They want to be able to say, 'I am able to do the following' so they can actually go ahead and further the organizations they work with."

This focus on outcomes means that in addition to providing relevant academic knowledge, nonprofit management educators are expected to effectively link theory and practice. Bridging the gap can be done in several ways: through case studies, service learning, experiential assignments (such as attending a board meeting), or a semester-long student experience with a nonprofit. Not surprisingly, each of these integrating assignments has implications for faculty roles and expectations. As one interviewee noted, "I think this conversation really highlights a few important parts of trying to teach in this way that [are] about deeper engagement to enrich the learning of your students; there is an awful lot of faculty time that plays into developing the relationships, managing the relationships, and I think it is hard."

So how do faculty manage these additional responsibilities? Some just take on additional work because they see real value in applied education. Others coordinate applied-learning programs through a nonprofit institute or center on campus that helps to facilitate community-based placements. Still others assemble advisory committees that identify learning sites for students, provide information about the kinds of skills and abilities most desired in the workplace, and recommend adjunct faculty with the talent to supplement the core curriculum with classes that are responsive to student interests. Incidentally, all interviewees involved in higher-education programs worked with a mix of permanent (i.e., "tenure track") faculty and qualified practitioners. In fact, some programs had far more adjuncts than full-time faculty, "Most of our faculty are practitioner-faculty. . . . We are really looking for people on our faculty who walk the walk every day, and that is important for us."

"Most of our faculty are practitioner-faculty. . . . We are really looking for people on our faculty who walk the walk every day, and that is important for us."

Challenges

As with other discplines, nonprofit management programs do not exist in isolation. They are part of a larger constellation of individuals, institutions, and other stakeholders who have particular—sometimes competing—expectations for performance that pose challenges for faculty teaching in these programs.

"When I came in as junior faculty, it was made clear that I was expected not only to teach but also to get involved with the community in order to keep this practical."

Formed in 1991 to share information and develop common standards, the Nonprofit Academic Centers Council (NACC) is a membership association made up of academic centers or programs at colleges and universities. The focus is the study of nonprofit organizations, voluntarism, and philanthropy. One of NACC's major activities is the development of curricular guidelines for both graduate and, as of 2007, undergraduate programs to assist in the design of nonprofit courses, programs, certificates, and degrees.

In one *NPQ* teleconference, an attendee asked, "What impact will the new NACC undergraduate guidelines have on nonprofit management education?" The response was varied. For some schools, the accreditation process offers program credibility. As one interviewee put it, "We're not just doing some vocational program. There is an accreditation process similar to business and that we can point to national standards that I think just gives our program a lot more credibility." For others, the guidelines have had no impact on curricular content, because programs are too new or too small and embedded within a larger academic home that has limited resources for expansion. For more resource-constrained programs, the standards create a tradeoff: "Which ball would you like me to drop to pick up something in the NACC curriculum in depth that needs more coverage?" explained one interviewee. And others were quite pleased that they had "successfully begged and pleaded to have faculty teaching required courses in an established degree-granting program [like an MPA or MBA] include readings, topics, and issues related to the nonprofit sector" in their curriculum. These differences also highlighted the variation in the level of institutional commitment to nonprofit management education.

A few spoke proudly about the resources that have been allocated to build a nonprofit curriculum or how institutional requirements had shifted in ways that support and encourage nonprofit applied learning. "When I came in as junior faculty, it was made clear that I was expected not only to teach but also to get involved with the community in order to keep this practical. . . . Is this worth my time if it doesn't count for tenure? The answer in our department is yes, and it counts big-time."

Yet regardless of whether nonprofit management education is seen as "integral to a social-justice mission" with institutional supports and resources or a growing field of interest in an established academic discipline, a common challenge for all these programs is that "there aren't enough hours to offer everything that needs to be offered." As one person noted, "the demand for resources weighs heavily on the side of 'how to' and 'teach me the latest fad/fashion' yet faculty need to balance what might be considered trendy elective courses with critical thinking about the field." Many faculty members have responded by offering "topics" classes that periodically change to reflect student demand. "We have done topics courses on social entrepreneurship over the last three years and had a huge enrollment; yet last year we enrolled only five students. . . . We haven't offered it this year." Others established working relationships with academic units across campus to identify and cross-list classes of potential interest to students interested in nonprofit management. As simple as cross-listing might seem, one interviewee was quick to note that these efforts sometimes meet resistance because of the "fear of competition from other programs [whose faculty members] believe a focus on nonprofit management dilutes their programs."

Faculty also discussed challenges related to keeping pace with technological innovation. They explained that students have surpassed faculty in terms of technological savvy. "Well, we use Blackboard and streaming video from PBS, but this is an area where educators are not as cutting edge as the students." Not only do educators have less technological savoir-faire, but some are downright resistant to integrating technology into the curriculum, particularly in the area of online education. Some programs had substantial online components, others offered hybrid programs that combine online education with classroom-based instruction, others have "mov[ed] in that direction," and still others had no Web-based course content. "You know, I have to admit: personally I am trying to open my mind, but I am a little resistant to the online stuff. And I think about it all the time and I struggle with it, and we have long discussions about it at faculty meetings, but I am just not there in my mind yet." One instructor speculated that resistance might be attributable to educators' sentiment that "it is not quite as much fun to teach online," as one interviewee put it. "Faculty enjoy being up in front of a class. So that is our challenge: to make sure the faculty are well trained."

Regardless of whether faculty are "there yet," the response from students involved in online education has been positive. "We have no complaints, and actually students are excited about it," says one educator. "It gives them more opportunities to connect with each other via email than they would otherwise if they just had time to meet in class." Moreover, from an academic perspective, online education has delivered. "We have found that academically, in terms of student learning, they learn as well or better than the students who are perhaps half asleep in the back of the class and not involved in the discussion in a face-to-face setting. Online, you can require students to participate; no one can sit in the back of the room and say nothing. So in terms of academic success, we have found it to be very positive."

A final challenge involves integrating theory and practice for undergraduate students whose idealistic commitment to save the world must be tempered with practical realities. As one instructor reported, "I have a lot of students who come to my class and say, 'Well, I am taking this nonprofit class because I want to start a nonprofit organization.' While it is certainly laudable that young people are recognizing unmet needs in their communities and that they understand the nonprofit sector can play a major role in addressing those needs as educators, we have a responsibility to provide core-content knowledge in ways that do not squash the dreams of the young people in our classes yet at the same time prepare them for the realities of a job in the sector." Another educator agrees:

> One challenge that I see from the perspective of students who have not worked before in the nonprofit sector is that they are very idealistic about life. They just assume that if they are going to go work in the nonprofit sector, it is enough just to have the desire to change the world. And when it comes down to getting their skills, sometimes they say, "So I really have to know how to do budgets?". . . In order to overcome this challenge, we ask them to do service-learning projects. In each class, we have applied-learning projects; they have to go to work with an organization in the community—kind of to give them a sense of reality. And it is really working quite well.

Looking Forward

Webinars, online classes, distance learning, video streaming, hybrid classes, and other new forms of educational delivery illustrate changes in the way information is transmitted between and among faculty and students. Our interviewees were quite thoughtful about the future of this area of education. Most agreed that course content delivery would continue to evolve and that technology would play a large role in the transition.

But technological innovation has developed at different rates in programs across the country. As one interviewee noted, "The thought was that it would develop equally across all regions, and that has just not been the case. We offer a hybrid class: a little bit online linked with a little bit of what we call 'residencies.' That seems to be exactly what the students here want. And then I go to other places and hear people say, 'Oh no. You can get rid of that residency stuff, because that is really not what they want.'" Another interviewee reinforced this opposing view. "No one sign[ed] up for [mixed-mode courses]. We found that people are either in the online mode of, 'I want to do this when I want to do this' kind of thing, or they are the kind of person who does like a classroom setting. The mixed mode—at least for us—was problematic . . . Right now the online component is only about 20 percent of our activity, but I expect that in the next five years that will double." And as a third interviewee explained, "We are still bringing people in. . . . We have people driving three or four hours, once a month, over a nine-month commitment. . . . The market isn't doing what people predicted

"Right now the online component is only about 20 percent of our activity, but I expect that in the next five years that will double."

“The complexities with relationships with government are going to provide lots of need for training and lots of interesting case studies to bring into the classroom.”

five or 10 years ago.”

A second change interviewees foresaw was an increasing focus on financial aspects of nonprofits and organizational sustainability. “I think that raising revenues or raising resources by nontraditional means for nonprofits is going to become more and more important. . . . There will be pressure for nonprofits to be more entrepreneurial and to try to develop ways they can raise revenues in ways they are not used to.”

And finally, the external environment and public policies in which nonprofits work pose important considerations for nonprofit management. “I believe that the complexities with relationships with government are going to provide lots of need for training and lots of interesting case studies to bring into the classroom. . . . The complex ways that nonprofits interact with government is, for me, the most important trend.” Another interviewee’s comments reinforced this idea:

> Government relations of course is essential, yet the glasses that I wear connect volunteerism and community engagement as well as national service. And I see a growing demand in that area, especially as more nonprofits are challenged to do more with less. Even though most pay lip service to volunteers, most of them would prefer to hire permanent staff. Yet more and more, I am called upon to ‘Give us more suggestions. Help us out.’ We need research to update our engagement [with] the community that reflects the changes in technology and workforce composition. And I do see, as funding becomes more stiff and as funders anticipate or expect nonprofits to work with volunteers, that even if they don’t want to, they are finding they have to becomes more sophisticated in that area.

Although nonprofit management education may still be a relatively young discipline, it has undergone impressive change in a resource-scarce environment. In the face of tremendous environmental shocks, perhaps the sector’s resilience—by being responsive to constituent expectations and by exploiting asset-based and self-development strategies—is another core element of successful nonprofit management education programs. Many had established elaborate networks of individuals and institutions capable of providing or taking advantage of resources to enrich student learning. Those we interviewed were creative, innovative, and committed to delivering quality educational experiences in a way that reflects student needs and interests.

And while nonprofit educational credentials may not be a current requirement in the sector, interviewees like this one expect that, over the next decade, evolution of the discipline and evolving standards will change that picture.

> I hope that the people hiring in the nonprofit sector will be demanding or be interested in a big way in master’s degrees in the nonprofit field. I don’t want to prognosticate that that will actually happen, but I think that for the whole thing to grow, you need the demand from the hiring side of it—just similar to MBAs as requirements for people in the business setting—to have equivalency in the nonprofit world. But that is going to take people hiring people when they have that credential, and I don’t see that quite yet, but hopefully within 10 years that will ramp up, and then the educational component will fit easier into the whole plan.

Judith Millesen is an associate professor of political science and a faculty fellow at the Voinovich School for Leadership and Public Affairs at Ohio University. Many thanks to Andrew Crosby who participated in every teleconference and helped coordinate the calls as well as the following educators who contributed their thoughts to this article:

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Education Directory 2008

The following directory of nonprofit management education programs lists programs by state. Some institutions offer single programs, while others offer an array. The programs offered by each institution are noted by numbers accompanying the listings from 1–8.

Readers wishing to get a fuller abstract for each program can access the database directly at http://tltc.shu.edu/npo/. Educational institutions may also update their information at this address.

Thanks to Roseanne Mirabella, Ph.D., Associate Professor, Political Science Department at Seton Hall University for working in collaboration with NPQ to produce the directory. The database resides as Seton Hall University and is maintained by the Seton Hall Department of Information Technology. Special thanks to Paul Fisher and Michael Soupios at the Teaching, Learning, Technology Center for developing and maintaining the site.

Key to Listings

1. Noncredit Programs
2. Undergraduate Certificate Programs
3. Undergraduate Concentrations (3+ courses)
4. Graduate Nonprofit Studies classes
5. Graduate Certificates
6. Graduate Concentrations Leading to a Masters
7. Graduate Degree Majoring in Nonprofit Studies
8. Online Courses

ALABAMA

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Arizona State University - Graduate Program 1,2,3,4,5,6,8
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Arizona State University - Noncredit and Professional Development Courses 1,8
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Arizona State University - Undergraduate Program 2,3
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American Jewish University 3,4,5,6
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California State University - San Bernardino 4
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California State University, Long Beach 4,8
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EDUCATION EMPORIUM

Just Another Emperor? The Myths and Realities of Philanthrocapitalism

by Michael Edwards

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A NEW MOVEMENT IS AFOOT THAT promises to save the world by revolutionizing philanthropy, making nonprofit organizations operate like business, and creating new markets for goods and services that benefit society. Nick-named "philanthrocapitalism" for short, its supporters believe that business principles can be successfully combined with the search for social transformation. There's no doubt that this is an important phenomenon, and although there are no exact definitions, I think there is a distinctive heart of philanthrocapitalism that is characterized by three distinguishing features:

- very large sums of money committed to philanthropy, mainly the result of the remarkable profits earned by a small number of individuals in the IT and finance sectors during the 1990s and 2000s;
- a belief that methods drawn from business can solve social problems and are superior to the other methods in use in the public sector and civil society; and
- a claim that these methods can achieve the transformation of society rather than increased access to socially beneficial goods and services.

What does the evidence tell us about these claims? It isn't possible to "prove" or "disprove" the claims of the philanthrocapitalists, since the evidence simply isn't there. This is a very young field, so this is not surprising. There are some serious studies of social enterprise, but by and large the literature is anecdotal or written by evangelists more interested in publicity than rigor. This is not a field where self-criticism or humility will win you any plaudits.

One clear subtext of the debate is the philanthrocapitalists' disappointment in the achievements of groups in civil society, which are criticized as "amateurish" and "riddled with inefficiencies," always in contrast to the operations of business.[1] There's also a tendency to make a fetish of certain kinds of "innovation" that privilege business thinking rather than to look at the impact that civil society makes on *its* own terms. The bedrock of citizen action may be effective but not especially "new": for example, the day-to-day work of solidarity and caring wins no plaudits, but it is incredibly important in holding societies together. Philanthrocapitalists love handing out new prizes—for building private spaceships and electric cars, for sequencing the human genome, and for ending global warming—but not for the Ladies Auxiliary or for reviving New Orleans.[2]

At the macro-level—that is, at the level of national social and economic performance—there's no evidence to suggest that increasing marketization in the social sectors brings better results than public or "pure" civil-society provision. The privatization of utilities and pensions has turned out to both inefficient and socially divisive, and during the 2000s, its failings helped push Latin America to the left.[3] Worldwide research by United Nations Research Institute for Social Development shows that countries with longer life expectancy and lower under-five mortality spend a significantly higher proportion of their gross domestic product on *government* health care, not private or social enterprise.[4] As Laurie Garrett has shown, the one thing necessary to address global health pandemics like HIV/AIDS is a strong public-health infrastructure, not a patchwork quilt of private and social provision.[5] Sustained health progress requires that technological advances be integrated with the redistribution of political power and broad-based participation in the economy.[6]

Both recent history and contemporary experience suggest that the best results in raising economic growth rates while simultaneously reducing poverty and inequality come when markets are subordinated to the public interest, as expressed through government and civil society.[7] Public and private interests must be separated so that governments have the autonomy they need to oversee development. This was true in East Asia after 1945, when the so-called Asian tigers transformed themselves from a GDP equivalent to that of Chad, Pakistan, and Haiti to a level that rivals parts of Western Europe; it was true in other successful experiences of international development, such as Chile and Botswana during the 1980s and 1990s, and it is true of China and Vietnam today.[8] Some would say it was even true of the United States in the nineteenth century.[9] In all these countries, business was encouraged to "do its thing," but in service to long-term goals that favored redistribution and social stability by "governing the market," in the words of a famous book by Robert Wade.[10]

Today, countries that practice similar policies score high on their social indicators (think Sweden, the Netherlands and Canada), while those like the United States, which have strayed from this path, remain more violent and unequal, though they can still enjoy high rates of productivity growth in their economies. The United States has become one of the Western world's less socially mobile societies and over the past 30 years has delivered stagnant incomes to a large minority. Meanwhile, the share of national income accounted for by the top 1 percent of earners has reached its highest level since 1928, at almost 22 percent.[11] Over the past 20 years, in terms of the latest global rankings of life expectancy, America has dropped from 11th to 42nd place.[12] Things look better on the Environmental Performance Index composed annually by Yale University (the United States is number 28), but now the *Economist* has devised an index that pushes the United States so far down the ranks that even Yemen scores higher (the reasons are: America's huge prison population, easy access to firearms, and burgeoning military budget.)[13] If author Oliver James is to be believed, "selfish capitalism" has already produced a measurable decline in our emotional well-being, "crippling personal agency despite the avowals of individual choice."[14]

Let's take the analysis down a few levels and look at the two areas in which philanthrocapitalists are already very active.

Strengthening the Capacity of Civil-Society Organizations

The first area where one would expect an impact to be made lies in improving the financial and management capacities of civil-society organizations.

I've always been confused by the way in which social entrepreneurs and venture philanthropists differentiate themselves from the rest of civil society on the grounds that they are "results based" or "high performance," implying that everyone else is uninterested in outcomes. Sure, there are mediocre citizens groups, just as there are mediocre businesses, venture philanthropists, social entrepreneurs, and government departments. So "why import the practices of mediocrity into the social sectors," as Jim Collins, author of *Good to Great*, asks in his pamphlet on nonprofit management?[15] What separates the good and bad performers is not whether they come from business or civil society but whether they have a clear focus to their work, strong learning and accountability mechanisms that keep them heading in the right direction, and the ability to motivate their staff or volunteers to reach the highest collective levels of performance.

In some areas, civil-society managers have just as much, if not more, to offer, because they can also see things in significantly different ways: mobilizing teams through more democratic structures, for example, using reflective and contemplative practices to improve their performance, developing accountability mechanisms that bring in all their stakeholders, and finding innovative ways of measuring their impact on both short *and* long-term goals. A recent study published in the *Nonprofit Quarterly* found that nonprofit leaders were actually more effective than their for-profit counterparts on 14 out of 17 dimensions of leadership practice, including risk taking, persuasiveness, and vision.[16]

Civil-society organizations need lots of advice, but as much from social science (which the philanthrocapitalists often ignore) as from consultants in management and finance. This doesn't mean that companies like the Bridgespan Group and McKinsey & Company are irrelevant to civil society. They are increasingly active in the not-for-profit world (funded in particular by venture philanthropy), and the services they offer are often very good. In his "Report from the Front Lines," Eric Schwarz, the founder of Citizen Schools Inc. (a U.S. social enterprise) accepts that the substance of what they bring has helped his organization considerably but rejects the implication that this proves private-sector superiority as "flawed and highly offensive."[17]

"Solutions that work have to work economically" is a mantra of this movement, but this doesn't necessarily imply the raising of commercial revenue. Philanthrocapitalists sometimes paint reliance on donations, grants, and membership contributions as a weakness for nonprofits, but it can be a real strength, because it connects them to their constituencies and the public—so long as their revenue streams are sufficiently diverse to weather the inevitable storms along the way. In that respect, more needs to be done to reduce the transaction costs of dealing with foundations and to address the "fashion consciousness" that is the curse of foundation funding: old, new, and all stops in between. In many cases, this would be a safer bet than pulling in more revenue from commercial capital providers, with all the risks that that entails.

"Nonprofits must understand that the desire to earn income and the desire to use business practices to promote social change are two different and almost entirely incompatible objectives. . . . Don't mix your models," is the warning of at least two cautionary tales from the field.[18] These tradeoffs are not inevitable (especially if commercial revenue generation is separated from advocacy and community mobilization, inside or in a different organization completely), but they are real.[19] Introducing the different logics of civil society and the market into the same organization can have a negative effect by confusing the bottom line still further, complicating accountability, and stimulating mission drift.

Expanding the Market for Social and Environmental Services

We already know that for-profit involvement in human services is often ineffective. This is what the *social* in social enterprise is supposed to fix, but does it? The answer is "Yes, to an extent," and "Sometimes" if the bar is set a bit higher.

For many, the most exciting examples of philanthrocapitalism are the huge investments in global health that the Gates Foundation is making, along with the Clinton Global Initiative and others. Given that someone dies from malaria every 30 seconds and that treated bed nets can be produced and distributed at very low cost, these investments are extremely important, and there's every reason to think that business and markets can help bring them to fruition. Even so, the latest guidelines from the World Health Organization recommend free distribution to ensure that everyone who needs a net gets one.[20]

The other high-profile success story is micro-credit or micro-finance—in some people's minds part of a broader claim that markets are the best way to eradicate poverty in developing countries, in contradiction to the lessons of history described in brief above. Although very few rigorous evaluations of the impact of micro-finance exist, it's clear that increasing poor people's access to savings, credit, and other financial services is a very good thing—and in one or two countries it has already reached significant scale (in Bangladesh alone, there are 21 million "clients" and 105 million "family members" who are recipients).[21]

Micro-finance increases people's resilience and reduces their need to sell precious assets in times of trouble, but on its own it doesn't move them out of poverty. That requires other, more complicated measures to develop a sustainable livelihood and create more well-paying jobs through large-scale, labor-intensive agro-industrialization; to address the deeper issues of disempowerment that keep certain people poor (land rights for example, or patriarchal social structures); and to get governments to redistribute resources on the necessary scale through health, social welfare, public works, and education.[22] Micro-finance institutions also need continued subsidies to reach the very poor, which raises questions about the philanthrocapitalist assumption that market methods, social goals, and financial sustainability are mutually supportive.[23]

The success of micro-finance has spurred the use of similar techniques for other goods and services, like cellphones and insurance. "The mobile phone. . . may be the developing world's Industrial Revolution for creating prosperity," says the Hudson Institute.[24] Or perhaps not. Grameen Phone in Bangladesh has achieved phenomenal success in spreading cell phone usage among the poor through female micro-entrepreneurs. Cell phones have a potential economic impact (on productivity) and social impact (on civil-society mobilization, for example), but as Grameen Phone's founder once told me, "It's really just good business."[25]

C.K. Prahalad's famous Bottom of the Pyramid (BOP) theory has become a core text of philanthrocapitalism by promising profits, poverty eradication, and empowerment—all in a seamless package. Prahalad claims that huge, untapped markets lie at the base of the global income distribution (or "pyramid"), which—when supplied with goods the poor can buy and sell—will lift them out of poverty and also transform their lives socially and politically.[26] But "the fortune and glory at the bottom of the pyramid are a mirage," says Aneel Karnani from the University of Michigan, "The fallacy of the BOP proposition is exacerbated by its hubris." Karnani produces evidence to show that many of the case studies used in support of BOP involve consumers who are not poor at all and that the products and services that are sold by "micro-entrepreneurs" have less market penetration and productivity-enhancing potential than is claimed, so they will fail to produce sustainable incomes.

What does this evidence tell us? First, it is perfectly possible to use the market to extend access to useful goods and services. Second, few of these efforts have any substantial, long-term, broad-based impact on social transformation, with the possible exception of micro-credit. The reason is pretty obvious: systemic change involves social movements, politics, and the state, which these experiments generally ignore.

At a smaller scale, there are increasing numbers of initiatives that successfully deploy market methods to distribute goods and services that can benefit society. Examples from the United States include Think MTV.com, an online community that serves as a platform for youth activism;[27] free channels for civil-society groups on YouTube and other Web sites;[28] SunNight Solar (which produces solar-powered flashlights and sells them at a discount); and the One Laptop per Child program, which manufactures cheap computers running on open-source software with help from Google.[29]

Then there are social enterprises that work with particular target groups or sectors: brokerage firms like Altrushare Securities, which makes profit from the stock market but shares it with "struggling communities" because it is owned by two nonprofits;[30] Bud's Warehouse in Denver, a career and life-skills training program for people who are rebuilding lives after struggling with addiction, homelessness, or prison;[31] and Housing Works in New York City, which generates $2 million annually for its work with homeless people from its used-book café (but still relies on grants for $28 million of its $30 million budget).[32] These techniques are especially common in the food industry, employment training and workforce development for low-income and other marginalized groups, and environmental goods and services like recycling, since this is where enough demand exists to generate a profit at a price point affordable to the poor.

These are important experiments, but the evidence suggests that they are much more difficult to operate successfully at scale than the philanthrocapitalists admit and that they usually experience some tradeoffs between their social and financial goals—at least if one goes by scholarly and policy-oriented studies. Here's a sample of their findings:

- A Stanford Business School study of 12,000 environmental NGOs between 1999 and 2006 found that "pragmatic" organizations failed more often than "pure" ones (i.e., those that did not compromise their principles to attract more revenue or profile), partly because their supporters preferred it that way. As a result, membership and fundraising is increasing in "pure" organizations and decreasing in "pragmatic" ones. "Social movements are most effective when they are purest, most radical, and most disorganized," write Conner and Epstein.[33]
- A survey of 25 joint ventures in the United States shows that 22 had "significant conflicts between mission and the demands of corporate stakeholders" and that the two examples that were most successful in financial terms deviated most from their social mission by reducing time and resources spent on advocacy, weeding out clients who were more difficult to serve, and focusing on activities with the greatest revenue-generating potential.
- A survey of human services organizations in Canada analyzed how their mission shifted out of existing activities and into "community counseling" as a result of the expected financial benefits from contracts in this area. These "were supposed to be the big cash cows of the twentieth century . . . making counseling centers tons of money." They failed.[34]
- Detailed case studies of social enterprises in the United States by Seedco, including Community Childcare Assistance which closed in 2003 after failing to secure the contracts it needed to operate successfully. "When organizations are expected to meet for-profit goals while operating under nonprofit rules," the survey concluded, "the double bottom line can

become an impossible double bind. . . . The more social responsibilities a venture assumes, the more difficult it is to succeed in the marketplace."[35]

- An evaluation of Project Shakti, a public-private partnership promoted by Hindustan Lever (HLL) in India, which integrates low-income women into the marketing chain of its producers, selling things like shampoo and detergent "to boost their incomes and their confidence." But there is "no evidence that the project empowers women or promotes community action" as opposed to making them "saleswomen for HLL," often at considerable cost to themselves, since there are cheaper brands available, returns on investment are therefore low, and the work is very hard.[36]

It would be foolish to generalize too much from these cases, but this is the evidence we have, and it shows how difficult it is to blend social and financial bottom lines. Few of these experiments are truly self-sustaining, mission drift is common, and failure rates are high. There's little room to maneuver and always tradeoffs to be made, and these realities can compromise the work's deeper impact on social transformation.[37]

Even when successful, social enterprises make soft targets for a takeover by conventional investors once they grow to a certain scale and profitability: think Ben & Jerry's, the Body Shop, and AND 1 shoe company. When it was taken over in 2005, AND 1 had all its social programs canceled.[38]

The other problem is scale: "fair trade" is estimated to reach 5 million producers and their families across the developing world, while social enterprises had earned revenue of only $500 million in the U.S. in 2005. In Britain they created 475,000 jobs (and $30 billion in value), which is substantial, though small in relation to the size of the economy.[39] In societies like the United Kingdom, where government and social enterprise are already symbiotic, nonprofit service provision can enhance public services. But where government is weak, it simply adds more patches to a quilt already full of holes.

Finally, is there any evidence that civil society is being damaged by these trends? Civil society works best when its ecosystems are healthy and diverse, yet we know from the limited research available that over the past 50 years these ecosystems have eroded. Diversity is declining as norms of good practice converge around a certain vision of "professionalism." Distance has increased between intermediary advocacy groups and NGOs and the constituencies on whose behalf they are supposed to work; older associations that used to bring citizens together across the lines of class, geography, and to some degree race, have disappeared, and groups built around single issues or identities have grown.[40] "Technocracy has transformed mediating institutions which once served as civic meeting grounds—locally grounded schools, congregations, unions, and nonprofits—into service-delivery operations," says Harry Boyte, the leader of the civic agency movement in the United States.[41]

In the United States at least, there are already signs of a growing fundraising divide between large national organizations and smaller local organizations, and between those working on advocacy and service delivery and those working on community organizing, grass-roots capacity-building, and the crucial task of linking citizens across constituencies.[42] In addition, the increasing control orientation of donors that is such a feature of philanthrocapitalism is reducing the autonomy and flexibility of civil-society groups, which are forced to spend and report on each donation exactly as prescribed. As a result, the U.S. nonprofit sector may be "getting larger but weaker," says Pablo Eisenberg, a staunch critic of what he calls the "corporatization of nonprofit groups."[43]

While the shape of civil society has certainly changed, not all these changes undermine social transformation, and it's impossible to disaggregate the impact of philanthrocapitalism from other influences on these trends. This evidence is obviously not conclusive, but it does suggest a pattern: success where one expects it, tradeoffs where rationalities collide, and—as a result—less impact on social transformation than the enthusiasts have often claimed. As a report from the W.K. Kellogg Foundation puts it, "The emphasis on sustainability, efficiency, and market share has the potential to endanger the most basic value of the nonprofit sector—the availability of 'free space' within society for people to invent solutions to social problems and serve the public good."[44]

The Shortcomings of Philanthrocapitalism

In conventional market thinking, "the social responsibility of business is to increase its profits," as Milton Friedman famously declared almost 40 years ago in the *New York Times*.[45] That's because the invisible hand is supposed "to be beneficial for the people it orders,"[46] maximizing social welfare as a by-product of self-interested but unconscious interactions, with some light regulation to ensure that business operates inside a framework of agreed social rules. One of the triumphs of markets is that they enable "separated knowledge to assure that each resource is used for its most valued use, and is combined with other resources in the most efficient way."[47]

Philanthrocapitalism gives this theory an extra twist by adding more explicit social and environmental considerations into the workings of the market. To what extent, however, can markets change, correct, or transform themselves? This question is especially relevant because philanthrocapitalism brings concentrated power and assumes that the provider knows what's best for the recipient.

In civil society, social transformation is usually a deliberate goal to be achieved through conscious collective action—civil society is the outcome of interactions by dispersed individuals and organizations too, though all acting with a purpose. The energy in civil-society dynamics is *external*, applied through pressure or partnerships of various kinds, and often aimed at getting governments to tax and regulate the business sector so that it contributes more to the public good. That's why the difference and independence of civil society is so important. "The move to distinguish social enterprise from private enterprise suggests that social objectives *stand distinct* from the interplay of individual pursuits."[48]

Going further, civil society is open to more radical alternatives rooted in completely different visions of property rights, ownership, and governance. "Should social value best be created by changing the way the economy is run or by increasing philanthropy to make up for the deficiencies and inequalities of an economy that is basically sound?"[49] It is these different approaches—internal, external, radical, and reformist—that animate the philanthrocapitalist imagination, but could it be that civil society and the market are asking different *questions*, not simply finding different *answers* to a question they hold in common?

Markets work because they stick to a clear financial bottom line, use a simple mechanism to achieve it (competition), and require a relatively small number of conditions to make that mechanism work (like the presence of multiple sellers from whom buyers can choose and access to information among consumers). Social transformation, by contrast, has none of these things, with many bottom lines and strategies to reach them, and relies on forces which are outside the control of any one set of actors. Those goals might be to reduce consumption, not increase it, so that the majority of the world's population might actually have a chance to secure a sustainable future. Economic efficiency is not the same as efficiency when measured by human fulfillment,[50] and for all sorts of well-known reasons, market norms do not properly express the valuations of a democratic society: they don't price real assets like the environment and social cohesion, they can't represent the needs of the future in the present, and they are full of imperfections that lead to problems like monopoly.

That's why we need alternative allocation mechanisms through government and civil society for things like public spaces or access to the Internet, which markets would distribute unequally, if at all. Civil society and the market are not just different; they pull in opposite directions in many important ways, and there is a long history of the risks involved in mixing them together.

The raison d'être of markets is to satisfy personal wants according to the purchasing power of each consumer, so expecting "creative capitalism" in Bill Gates's words to "serve poorer people" doesn't make much sense against the background of large-scale inequality.[51] By contrast, the best of civil society exists to meet needs and realize rights, regardless of people's ability to pay. There is no price of entry to civil society except the willingness to work together. Of course, people can still be excluded from participating in citizens' groups for social or political reasons, but rarely as a result of a lack of effective demand.

Competition versus Cooperation: Individualism or Collective Action?

Effective markets are characterized by healthy competition against a clear bottom line. Even companies that practice "triple-bottom line" accounting revert to the financials when the rubber hits the road, since businesses are legally structured to deliver shareholder returns. Civil society, by contrast, faces many bottom lines, and works through cooperation and sharing to achieve them. There's competition in civil society too, of course (for funding and allegiances), but it's not the basic mechanism through which citizen action works. That's because civil society is good for many things where competition would be illogical or ineffective (to name just three: building community, promoting voice and accountability, and maintaining one's identity), whereas markets are good for only one: where competition is essential (producing and exchanging goods and services).

What lies at the core of markets is individualism and the role of the individual entrepreneur as the prime proponent of change. What lies at the heart of civil society is collective action and mutuality, which "challenge rather than accept and adapt to the atomization and individualization of society."[52] Jeff Skoll is proud to say that social enterprise "is a movement *from* institutions *to* individuals," because they "can move faster and take more chances."[53] Indeed they can, but can they also generate system-wide changes in social and political structures that rely on collective action and broad-based constituencies for change? In his pamphlet "Everyone a Changemaker," Bill Drayton describes how social entrepreneurs "decide that the world must change in some important way . . . and build highways that lead inexorably to that result."[54] It's no coincidence that he offers so few examples of genuinely systemic change and makes no mention of the many ways in which systemic change has already been achieved in relation to the environment, civil rights, gender, or disability. In all these cases, change came about through the work of movements rather than heroic individuals; and in all these cases, change involved politics and government as well as civil society and business.

Technocracy versus Politics: Reform or Transformation?

Although the landscape is shifting a little as a result of accumulated experience (especially at the Gates Foundation) the great majority of venture philanthropy supports technical solutions and rapid scaling up ("Technology plus science plus the market brings results"). "The new philanthropists believe there must be a magic bullet for everything, an instant cure for poverty," says Sanjay Sinha, the managing director of Micro-Credit Ratings International Ltd. in India. "They are not willing to believe that poverty reduction is a far more complicated matter than the idea of e-Bay."[55]

Where philanthrocapitalists see addressing the "misalignment between social goals and economic incentives" that lie at the root of the problem,[56] civil society names and addresses the realities of injustice: racism, sexism, homophobia, and rights—terms that rarely appear on the lips of any of the "new" foundations. This is not just semantics. It comes from business's aversion to the kind of protest and hard-edged advocacy that were central to past successes, for example, in civil and women's rights. "Social entrepreneurs are basically revolutionaries but are too practical to be placard-carrying types," says Pamela Hartigan, the Schwab Foundation's managing director.[57] It's good that Hartigan's "sisters" in the struggle for the vote didn't heed this misleading advice.

In business the pressure to quickly go to scale is natural, even imperative, since that's how unit costs decline and profit margins grow, but in civil society things have to move at the pace required by social transformation, which is generally slow because it is so complex and conflicted. Having inherited their wealth or made it quickly, the philanthrocapitalists are not in the mood to wait around for results. In business, scaling up tends to be "direct" (more production, larger markets, and more consumers), whereas in civil society, scale tends to come through "indirect" strategies that change policies, regulations, values, and institutions—for example, the rules within which individual producers operate in order to generate a bigger, systemic impact.[58] Business wants "smooth distribution, quick certain payment, and really high volumes" in order to maximize returns, whereas civil society might focus on small numbers of people and their concerns, which are rarely, if ever, smooth.[59]

Market Metrics versus Democratic Accountability

Shifting from public to private delivery takes decision making out of the public domain and potentially takes considerations of the public interest off the table. "Public spending is allocated democratically among competing demands, whereas rich benefactors can spend on anything they want, and they tend to spend on projects close to their hearts."[60] "I remember a day," laments Robert Reich, "when government collected billions of dollars from tycoons like these, and when our democratic process decided what the billions would be devoted to."[61]

Business metrics and measures of success privilege size, growth, and market share, as opposed to the quality of interactions between people in civil society and the capacities and institutions they help to create. When investors evaluate a business, they ultimately need to answer only one question: how much money will it make? But as Jim Collins puts it, money is an input to citizens groups, not a "measure of greatness."[62] And while work is being done to quantify the "social rate of return" from investments in citizen action, this is extremely difficult, perhaps impossible, to do, leaving philanthrocapitalists to rely on measuring the *economic* benefits that derive from projects that create employment, housing and the like.

In civil society, however, processes of engagement with other institutions and constituencies may be more important as a measure of impact than are tangible outputs or the direct products of each organization, and impact relies on forces, such as government action, which are usually out of their control. Social transformation requires humility and patience, the determination to hang in there for the long term—a mirror image of the impatience and short-term thinking that drives most markets and entrepreneurs.

Blending and Blurring: Can These Differences Be Bridged?

These are deep-rooted differences, but are business and civil-society rationalities unbridgeable, frozen forever in some mutually antagonistic embrace? Philanthrocapitalism answers this question with a loud and emphatic no; social enterprise, venture philanthropy, and corporate social responsibility have staked their future on the claim that these very different philosophies can be brought together to mutual advantage.

Let's start by acknowledging that all organizations produce different kinds of value in varying proportions—financial, social, and environmental—whether they are citizens groups or business. This is the foundation for Jed Emerson's Blended Value Proposition, which has been influential among the philanthrocapitalists.[63] These proportions can be changed, or "blended," through conscious or unplanned action, but not without real implications for those forms of value that are reduced, challenged, or contradicted in return, and this is where the theory of blending really begins to wobble. For one thing, what sort of "blends" are effective in work for social transformation: strong, weak, corporate, fair trade, or organic? Does one set of values become diluted or polluted when you mix it with the others? Are there some things—like oil and water—that do not mix at all?

Discussions of blended value seem to take place in a world free of tradeoffs, costs, and contradictions. Positive synergies *are* possible between service provision and advocacy, for example, and service providers can certainly get more social value against an acceptable financial bottom line, but this is much less likely for other forms of citizen action, since most have nothing to sell or trade at all. They *are* their social value, and the consequences of seeing it eroded could be calamitous.[64] There is also plenty of experience among organizations that started off with a social purpose and steadily lost it as they became more embedded in the market: this was the experience of many of the mutuals, micro-credit organizations and building societies that flourished in Europe in the nineteenth and twentieth century.

The second theory underpinning philanthrocapitalism extends competitive principles into the world of civil society, on the assumption that what works for the market should work for citizen action too. Some call this the creation of a "social capital market," in which non-profit groups would compete with each other for resources, allocated by investors according to certain common metrics of efficiency and impact.[65] Believers in this school of thought therefore set much sway on the collection of standardized data and its storage on the World Wide Web, so that those who want to give to charity have more information to guide their decisions—like GuideStar and GiveWell in the United States, which "studies nonprofits in particular fields and ranks them on their effectiveness"—defined as "the most lives saved for the least money"—an assessment that has defeated the best social scientists for at least a hundred years.[66] Finding better ways to measure success is obviously important, but the number and range of indicators that can be standardized and generalized across the civil society universe is small—things like administrative costs and short-term outputs—and these are rarely significant as markers of deep and long-term impact. Changes in values, voice and power relations are the critical factors and they can certainly be evaluated, but it doesn't make much sense to tie these changes to individual organizations operating in a two- or three-year time frame.

"In the past," says David Bornstein, "citizen-sector organizations have been insulated from the forces of head-to-head competition. However, as the sector continues to attract talent, competition is likely to intensify, *particularly as social entrepreneurs seek to capture the benefits of their innovations* [emphasis added]."[67] Bornstein goes on to claim that competition will promote collaboration—there's that "cost-free blend" again—because "weak performers" will copy strong ones, an assumption that ignores how citizen action actually works—collegially but in different ways for different purposes and constituencies. "Unproductive citizen-sector organizations can plod along ineffectually for decades,"[68] he says, but others might just as reasonably say that they work quietly creating results that his metrics do not and cannot count.

Competition might even make things worse, by pushing nonprofits to economize in key areas of their work: to eschew, for example, the most complicated and expensive issues and avoid those most difficult to reach. Outside service provision, it's difficult to see how competition would make any sense at all, and not just because the relevant market conditions are unlikely to exist. Would the Ladies Auxiliary compete with other groups to host the children's Christmas party? Would there be increasing competition between voluntary fire and ambulance brigades or between Moose and Elks or among groups dealing with different issues like HIV and schools? And who would really benefit? It's true that advocacy groups compete for members and for money, but often they cooperate, and in any case organizations are not easily "substitutable" in civil society because affiliations are based on loyalty, identity, and familiarity, not on the price and quality of services provided. It's unlikely that members of the NAACP will cross over to the Puerto Rican Legal Defense Fund if they feel dissatisfied with their leaders.

It's because of these questions that collaboration among separate organizations may be better than blending or competition. It preserves the difference and independence required to lever real change in markets (not just extend their social reach) and to support the transition to more radical approaches that might deliver the deeper changes that we need. And it restricts business influence to the two areas where it makes good sense. The first is social and environmental service-delivery, which is the core of social enterprise and the prime focus for most venture philanthropy investments. This approach is theoretically sound because it supports markets in doing what they are good at but with more of a social twist, and it doesn't encourage business to stray into territory where it has no competence or expertise.

The second is the use of business experience to strengthen the financial management of civil-society organizations, especially those that have something to sell or trade in the marketplace. If you want to play in the sandbox of the market, you obviously need to understand how the market works and how best to engage it. These are not skills that most nonprofits have, so one would expect that business should be able to help them, perhaps creating some spillover effects in the process that strengthen their social mission.

Apart from these two areas, there's little to support the view that philanthrocapitalism will save the world, and the most promising efforts that might do so have little to do with social enterprise, venture philanthropy, and corporate social responsibility: new business models built around "the commons" ("the wealth we inherit or create together"), like open-source software and other forms of nonproprietary production;[69] community economics and worker-owned firms, which increase citizen control over the production and distribution of the economic surplus that businesses create;[70] cooperatives like Mondragon, with more than 100,000 staff in several dozen countries and doubling in size every decade for the past 30 years;[71] and different ways of sharing resources with one another like "ecosystem trusts" and mutual funds that pay dividends to everyone—ideas that have been recently publicized by Peter Barnes, for example, the cofounder of Working Assets.[72]

These are all areas where civil society influence is far more important than the influence of the market, and they take us into nonmarket solutions to social problems or market transformation, using spaces free from the rigors of the market. The problem is that none of these approaches are high on the philanthrocapitalist menu, perhaps because they would transform the economic system completely and lead to a radically different distribution of its costs and benefits. Systemic change has to address the question of how property is owned and controlled and how resources and opportunities are distributed throughout society. That's presumably why Jim Collins, in a pamphlet that seems conspicuous by its absence given his stature in the corporate world, concludes that "we must reject the idea—well-intentioned, but dead wrong—that the primary path to greatness in the social sectors is to become more like a business."[73]

Moving Forward Together: Civil Society and Philanthrocapitalism

Philanthrocapitalism offers one way of increasing the social value of the market, but there are other routes that could offer equal or better results in changing the way the economic surplus is produced, distributed, and used: the traditional route that uses external pressure, taxation, and regulation; the philanthrocapitalist route that changes internal incentives and gives a little more back through foundations and corporate social responsibility; and more radical innovations in ownership and production that change the basis on which markets currently work. We don't know which of these routes carries the greatest long-term potential, though all of them rely on civil society as a vehicle for innovation, accountability, influence, and modified consumption, and especially for getting us from reformist to transformational solutions.

"What could possibly be more beneficial for the entire world than a continued expansion of philanthropy" asks Joel Fleishman in his book that lionizes the venture-capital foundations.[74] Well, over the past century far more has been achieved by governments committed to equality and justice and by social movements strong enough to force change through, and the same might well be true in the future. No great social cause was mobilized through the market in the twentieth century. The civil-rights movement, the women's movement, the environmental movement, the New Deal, and the Great Society were pushed ahead by civil society and anchored in the power of government as a force for the public good. Business and markets play a vital role in taking these advances forward, but they are followers, not leaders; they are "instruments in the orchestra" but not "conductors."

"We literally go down the chart of the greatest inequities and give where we can effect the greatest change," says Melinda Gates of the Gates Foundation,[75] except that some of the greatest inequities are caused by the nature of our economic system and the inability of politics to change it. Global poverty, inequality, and violence can certainly be addressed, but doing so requires the empowerment of those closest to the problems and the transformation of the systems, structures, values, and relationships that prevent most of the world's population from participating equally in the fruits of global progress. The long-term gains from changes like these will be much greater than those that flow from improvements in the delivery of better goods and services. After all, only the most visionary of the philanthrocapitalists have much incentive to transform a system from which they have benefited hugely.

So where are the examples of organizations funded through philanthropy that do really make a difference? There are thousands of them scattered widely across the world through civil society, but very few receive support from the philanthrocapitalists. Established after the Los Angeles riots in 1992, Strategic Concepts in Organizing & Policy Education, or SCOPE, addresses the "root causes of poverty" by nurturing new "social movements and winning systemic change from the bottom up."[76] It has involved almost 100,000 low-income residents in community action to secure a $10 million workforce development program with the Dreamworks Entertainment Corporation, developed a regional health-care program funded by local government; initiated the Los Angeles Metropolitan Alliance to link low-income neighborhoods with each other across the city and upward to regional solutions; and launched the California State Alliance, which links 20 similar groups throughout the state to develop new ideas on environmental policy, government responsibility, and reforms in taxation and public spending.

In 1997, Make the Road by Walking opened its doors in the Bushwick section of Brooklyn to build capacity among immigrant welfare recipients, but soon expanded its focus to combat the systemic economic and political marginalization of residents throughout New York. Since then it has collected through legal advocacy more than $1.3 million in unpaid wages and benefits for low-income families and secured public funding for a student success center to meet the needs of immigrants.[77] Both organizations are part of the Pushback Network, a national collaboration of community groups in six states that is developing a coordinated strategy to change policy and power relations in favor of those they serve from the grass roots up.

Outside the United States there are lots of similar examples. Take SPARC in Mumbai, India, which has been working with slum-dwellers since 1984 to build their capacity to fight for their rights and negotiate successfully with local government and banks.[78] SPARC—whose motto is "breaking rules, changing norms, and creating innovation"—sees inequality as a "political condition," the result of a "deep asymmetry of power between different classes," not simply "a resource gap."[79] SPARC has secured large-scale improvements in living conditions (including more than 5,500 new houses, security of tenure for many more squatters, and a "zero-open defecation campaign"), but just as important, it has helped community groups to forge strong links with millions of slum dwellers elsewhere in India and across the world through Shack Dwellers International, or SDI, a global movement that has secured a place for the urban poor at the negotiating table when policies on housing are being developed by the World Bank and other powerful donors.

Groups like these do deliver tangible outputs like jobs, health care and houses, but more important they change the social and political dynamics of places in ways that enable whole communities to share in the fruits of innovation and success. Key to these successes has been the determination to change power relations and the ownership of assets and put poor and other marginalized people firmly in the driver's seat, and that's no accident. This is why a particular form of civil society is vital for social transformation and why the world needs more civil society influence on business, not the other way around. It needs more cooperation, not competition; more collective action, not individualism; and a greater willingness to work together to change the fundamental structures that keep most people poor so that all of us can live more fulfilling lives.

Venture philanthropists and social entrepreneurs are pragmatic people, and they could argue that action is vital in the here and now while we move slowly along the path to social transformation. Pragmatism is a feature of civil society too, and neither wants to make "the best the enemy of the good." Small victories are still victories, and a vaccine against HIV/AIDS would be a very big victory indeed. "I don't believe there is a for-profit answer to everything," says philanthrocapitlaist Pierre Omidyar, "but if for-profit capital can do more good than it does today, foundations can concentrate their resources where they are most needed," a welcome dose of common sense in a conversation dominated by hype.[80] Indeed, no one is forcing Omidyar, Gates, Skoll, and the rest to give billions of dollars away, and they could keep it for themselves.

Organizing a Better Conversation

What we need is a good, old-fashioned, full-throated public debate to sort out the claims of both philanthrocapitalists and their critics, and to inform the huge expansion of philanthropy that is projected over the next 40 years. So here's the $55 trillion[81] question: will we use these vast resources to pursue social transformation or just fritter them away in spending on the symptoms?

The stakes are very high, so why not organize a series of dialogues between philanthrocapitalists and their critics on the condition that they shed the mock civility that turns honest conversation into jello? Deep-rooted differences about capitalism and social change are unlikely to go away, so let's have more honesty and dissent before consensus so that it might actually be meaningful when it arrives.

Effective philanthropists do learn from their experience and the conversations they have with others. Melinda Gates, for example, describes this process well: "Why do something about vaccines but nothing about clean water? Why work on tuberculosis but not on agricultural productivity? Why deliver mosquito nets, but not financial services?"[82] Of course, there's another set of questions waiting to be answered at a much deeper level: Why work on agricultural productivity but not on rights to land? Why work on financial services but not on changing the economic system? But these are challenges that face all foundations, and they are best addressed together, since all of us have much to learn from others. Rather than assuming that business can fix philanthropy, why not put all the questions on the table and allow all sides to have their assumptions tested? This kind of conversation might lead us far beyond the limitations of the current debate and closer to that ultimate prize of an economic system that can sustain material progress with far fewer social, personal, and environmental costs.

Only 11 percent of the money that Americans give to charity addresses public and social benefit, so this is far from an academic issue.[83] Philanthropy is based on the understanding that tax breaks are given in return for a commitment to use the same resources as or more effectively than government, so it is not unreasonable to ask whether tax-exempt activities are living up to their side of this agreement. However, humility and self-criticism don't come naturally to many foundation leaders or social entrepreneurs, so it will take more than a conversation to encourage them to live up to their social and political obligations. A voluntary commitment to principles of mutual learning, transparency, democracy, modesty, devolution, and structural and systemic change might garner publicity for a vigorous and revealing discussion of the uses and limitations of venture philanthropy and social enterprise.

Could it be that civil society can achieve more impact on capitalism by strengthening its distinctive roles and values than by blending them with business? Are civil society and business just different ways of answering similar questions about production and delivery, or are they asking different questions about society altogether? That's the beauty of a different kind of conversation in which there is sufficient room for all these positions to be listened to and heard. What we must avoid is a cocktail in which civil-society influence is significantly diminished.

Citizens' groups have nothing to be ashamed of in not being a business and everything to gain by reasserting their difference and their diversity. At its best, voluntary action releases incalculable social energy: the sheer joy of collective action for the public good, free—as far as is humanly possible—of all commercial considerations and self-interest. That is surely something to preserve and extend as we edge closer to a world that is thoroughly and comprehensively transformed.

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Volunteer Management: Once More with Meaning

by Jennifer Woodill

Volunteering is widely recognized as a key strategy of community engagement and participation. Providing much-needed support and services at a community level, volunteering also delivers on civic and philanthropic values within society at large. Volunteering has been widely highlighted in "big picture" discussions about community development, social inclusion, social capital, and community health. It is also frequently cited as a key expression of civic engagement and participation generally in society, and rates of volunteering have been used to measure overall community health.[1] Volunteering is recognized as a key activity in national and international circles that promotes social inclusion and social justice, beginning at the grassroots level but extending to societal changes at local, national, and international levels. The United Nations Development Programme articulates the benefits this way: "Volunteering brings benefits to both society at large and the individual volunteer. It makes important contributions, economically as well as socially. It contributes to a more cohesive society by building trust and reciprocity among citizens."[2]

And for many, volunteering opens the door to new opportunities for personal and professional development. For example, in a study on volunteerism, newcomers to Canada report benefits that include acquiring professional experience and contacts in a new country, reducing social isolation, gaining an opportunity to practice English, and getting a chance to learn more about social-service work and Canadian society in general.[3] Volunteering offers a unique strategy for social change, providing support to society and to those who volunteer.[4]

Volunteering can play a critical role in fostering social inclusion. But how do those who make decisions about volunteer recruitment think about these questions—indeed, do they think about these questions at all?

I come to this discussion from a personal perspective. After years of doing front-line community work in an organization with strong community development principles, I applied to work as a volunteer coordinator. I had done research on the role of volunteering in fostering social inclusion and social justice, and I wanted to play my part in the vision.

But soon after, I developed the sinking feeling that I was in the wrong job. New to a volunteer management role (though I had worked with volunteers for years), I wanted to learn everything to do my job well. I jumped headfirst into a new world: I read voraciously about management practices, joined the local Association for Volunteer Administration, and connected with other managers. I learned about topics of interest for volunteer managers, such as recruiting, screening, evaluation, risk management, and so on. My big-picture questions about how voluntarism connects to community development, civic engagement, and social inclusion were never discussed in these resources, however, or in meetings with other volunteer managers. I felt as though I had landed in a completely different profession, perhaps as a factory manager of sorts, churning out well-oiled volunteers as efficiently as possible. I began to wonder what was going on.

I realized that volunteering suffered from a serious disconnect. While theoretical discussions of volunteerism recognize it as a powerful tool for civic engagement and community development, these ideas have not translated into volunteer management practice on the ground. Under increasing pressure to professionalize volunteer management, there has been little reflection on *practice* and, in particular, how "best practices" *limit* opportunities for citizen engagement and social inclusion. I believe that the underlying principles of endorsed best practices are the principles of *efficiency*, *resource development*, and *control* and that social exclusion is an inevitable result of using these principles at the center of volunteer management practice. This discussion challenges traditional practices and suggests how to make social inclusion a central goal of volunteer management.

Working with Volunteers: Key Questions

- Why has—or hasn't—your organization recruited volunteers? To fill a void in labor, to encourage community involvement, or both? What role do volunteers play? Are volunteers allocated to manual labor tasks or front-line service work, or do you involve volunteers at a "higher" level, in, say, advocacy, research, and so on?
- Do volunteers see themselves as members of your organization or merely as helpers?
- Who makes decisions about who can and can't volunteer at your agency? Who is the gatekeeper, and how is this responsibility negotiated?
- Does your volunteer coordinator view himself as an administrator, gatekeeper, or community development worker? In terms of responsibilities and authority, how is the coordinator positioned in your agency?
- Who makes up your volunteer force? How diverse is the volunteer base? Do volunteers reflect the community in terms of cultural diversity, age, and class? If not, why? How does your organization's volunteerism affect society at large? Could it have greater impact if more people participated in volunteering?
- What skills, capacities, and relationships do volunteers develop at your organization? Does your organization have a volunteer development program in place?

Traditional Volunteer Management

Linda Graff and Paul Reed report an estimated 2 percent annual decline in volunteerism, amounting to a 20 percent decline over the next decade.[5] While the decrease is disconcerting, these numbers beg a question: how many people try to volunteer but aren't successful? We assume that volunteerism is declining because fewer people want to volunteer. But could there be a more complex story underlying this decline? Do prospective volunteers face barriers that discourage participation? Do some face more barriers than others?

In fact, social exclusion is an inevitable result of conducting volunteer management based on the principles of *efficiency, resource development, and control*. These principles are all interrelated and work to support one another. *Efficiency* is about finding volunteers as quickly as possible who will do the job as quickly as possible. In our sector, efficiency is an epidemic that ultimately values quantity over quality of connection. Efficiency justifies turning a prospective volunteer away because he doesn't fit neatly into an organization's predetermined needs.

The principle of *resource development* views volunteers—much like money—as resources or assets. You can see this principle at work by identifying where volunteer management lives within an organizational structure. Often volunteer management is housed with administrative and fundraising functions. This principle underlies the trend to *measure* volunteering and calculate hours worked, people employed, and placing dollar values on the value of a *resource*. Again, quantity rules over quality, because a numerical value cannot express relationships developed or the ability to cultivate passion in another's work. This principle of resource development allows an organization to deem a prospective volunteer "not worth the effort" after conducting a quick cost-benefit analysis. But if a volunteer is poorly educated or he has a disability, traditional management principles don't view him as a valuable resource.

The principle of *control* plays out in all volunteer management practices, which enforce top-down systems with clear rules of accountability and responsibility. A controlled system doesn't allow for gray areas, and communication is top-down. Volunteer managers decide how volunteers can be involved, and volunteers decide only whether they like the mode of involvement. If not, they have to go elsewhere. There is no flexibility or reciprocity in a controlled system.

The principles of *efficiency, resource development, and control* direct volunteer management practices, where the focus is on finding people to do the work as quickly and easily as possible. So while volunteering can be a win-win strategy for both organizations and volunteers, it cannot meet this potential when the scales are tipped to benefit organizations at the expense of citizen engagement and inclusion.

There is a disconnection between volunteer management practices and the broader goals of the social-service sector—ostensibly to support people as they make progress in their lives. Indeed, consider these scenarios, where organizations' ostensible goal to promote volunteerism is discouraged in practice. When an organization has a program that theoretically supports newcomers but rejects them as volunteers, for example, there is a disconnect. When an employment program seeks volunteers but refuses to accept the unemployed on the premise that they will ultimately find jobs and will lack commitment, there is a disconnect. And finally, when we don't view our work with volunteers as integral to our support of communities, there is also a disconnect.

I propose an alternate way of approaching volunteer work and management, where the emphasis is on social inclusion and community development. With this alternate way of thinking, planning for volunteer involvement, practices, and management structure starts with these central questions: "How can we find creative ways for community members to get involved in and engaged by our work? How can we develop an organizational culture where volunteer engagement and involvement is central to all our programs? How can we develop a culture in which volunteers are completely integrated into the organization?" These questions move us in new and creative directions.

Traditional Volunteer Management versus Volunteer Management from a Social-Inclusion Perspective

Traditional Volunteer Management Practices	Volunteer Management from a Social-Inclusion Perspective
Recruiting is based on agency needs for volunteers.	Community members meet with those who want to volunteer to identify strengths and develop avenues for involvement.
Recruit and screen to find the "best" person for the "job," and reject those who don't meet criteria.	Make every effort not to reject volunteers from community involvement. Continuously work toward creating opportunities for involvement.
Volunteer managers' role is to track organizational needs and fill these needs with volunteers.	Volunteer managers play an organizational role that requires being receptive to agency needs as well as to volunteer needs. Managers challenge staff to think creatively about volunteer involvement.
There should be a clear separation between volunteers and clients.	Participant-volunteer models can encourage leadership development and empower community members.
Some volunteers involve more effort than their help warrants. Organizations conduct a cost-benefit analysis to determine whether volunteers are worth the time and effort. They recruit, screen, and select volunteers who are self-starters, hard workers, and reliable.	Volunteering is an important avenue for those who experience barriers to paid work and participation in society. Volunteering boosts self-esteem, reduces social isolation, and builds new relationships.
Depending on their qualifications, volunteers are given a specific job to do.	Volunteering is fluid, enabling community members to get involved in new ways, to ask questions, to observe, and to help spontaneously.
Volunteers need to fit organizational qualifications in order to volunteer (e.g., a newcomer with poor English skills would not be appropriate as a children's tutor).	An organization explores ways to create opportunities for learning, (e.g., three-way volunteering is a model that enables newcomers to partner with volunteers in tutoring children).
Volunteers are trained to do their job better, more efficiently, and without needing support.	Organizations can focus volunteer training to provide community leadership training, to support and inspire volunteers to lead and actively participate in their community.

In this model, recruitment is a fluid process and happens continuously. Volunteer managers play an integral role in an organization, balancing the organization's need for volunteers with the interest and assets of those who want to volunteer. Instead of developing job descriptions and then recruiting to fill these volunteer positions, managers define roles and responsibilities in a more fluid way. Someone who wants to share his skills can approach a needy organization with a proposal for volunteering, and the job description can be written spontaneously. An annual asset-mapping exercise with volunteers can highlight the skills of volunteers and programming can then be developed to exploit shared assets. Perhaps new programs and activities are born from volunteer talents.

In this model, a commitment to social inclusion requires that an audit be conducted regularly on volunteer opportunities available and how such opportunities limit participation from community members. If most volunteer opportunities require strong proficiency in English to participate, for example, then the requirement should exclude those lacking a high level of proficiency. But in this model, an organization also makes a commitment to think creatively about ways to create opportunities for newcomers to volunteer. Instead of finding the "best" person for the "job," an organization makes a commitment *not* to exclude newcomers from participation in a community and to create meaningful space for their engagement.

In this new model, volunteers work alongside staff rather than in a strict hierarchy. Volunteers are involved at all organizational levels, not just in front-line work but also in supporting managers and directors, perhaps as volunteer consultants, trainers or researchers.[6] The interaction between staff and volunteers is more fluid, whereby staffers mentor volunteers, but volunteers also play a mentoring role, sharing expertise with staff.

In this model, staffers actively encourage and support clients who want to volunteer to gain new skills, meet new people, and get involved in their community. When clients become volunteers, their relationship to the organization changes significantly. As clients, they came to the organization for help and services. As volunteers, they now come to the organization to get and give help and develop a sense of pride through their participation. Staff members are committed to provide extra support to volunteers who need it and view this work as integrated with the larger goals of the organization and the goal of enabling volunteers to move forward.

In this model, risk management strategies must be considered in light of a social-inclusion perspective. An organization acknowledges that while volunteer screening is sometimes necessary (a sex offender should be prohibited from volunteering at an organization that works with children, for example), that screening often serves to exclude those who already face barriers to volunteering. In this model, organizations acknowledge that life is inherently risky, innovation is risky, and the safe route is not necessarily the best route.

What Next?

This discussion just begins to scratch the surface of the conversation, a conversation that must go deeper with those who are passionate about changing our approach to volunteer management. Bring this perspective to your organization, and get those at the top on board. Convey the importance of volunteerism in terms of promoting civic engagement and social inclusion and the exclusionary effect of traditional volunteer management practices. Find a way to reflect creatively on your organizational principles and practices as you work with volunteers.

Finally, talk to funders about the potential of embracing volunteer management as a tool for civic engagement and community development. When funders make this connection and buy in to its importance, you can establish the argument for funds to support this important work. Note, however, that acquiring funding is a long-term goal without much yield in the near term. In the meantime, organizations have to think creatively and change practices because of lack of money.

Let's get reinspired by volunteerism as a tool for social change. As the United Nations puts it, volunteerism "contributes to a more cohesive society by building trust and reciprocity among citizens." This important work should not be taken lightly. This work that is inspiring.

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Endnotes

1. See Robert Putnam, *Bowling Alone*, 2000; and Who Cares? The Graff-Reed Conversations, 2007.
2. United Nations Volunteers Programme (http://www.undplao.org/unv/index.php).
3. Beth, De Long, "The Meaning of Volunteering: Examining the Meaning of Volunteering to New Canadians," Pillar: London, Ontario, March 2005.
4. This quote illustrates the win-win: "By caring and contributing to change, volunteers decrease suffering and disparity, while they gain skills, self-esteem, and change their lives. People work to improve the lives of their neighbors and, in return, enhance their own." "Making a Case for Volunteer Centres," Volunteer Ontario, 1996.
5. Graff and Reed, 2007.
6. Robert Putnam argues that linking social capital, also known as "scaling up," creates connections between social strata (such as a volunteer connecting with a senior manager), enabling lower-income workers to gain access to networks, power, and wealth.

Jennifer Woodill developed these ideas while working at St. Christopher House (www.stchrishouse.org), a social service agency committed to community development thinking and practice. Woodill now works at the Heart and Stroke Foundation of Ontario as a community volunteer specialist, and can be reached at jwoodill@hsf.on.ca.

Do you have a volunteering experience you would like to share? Submit a letter or provide comments at feedback@npqmag.org. Reprints of this article may be ordered from http://store.nonprofitquarterly.org, using code 150111.

A Conversation with California Congressman Xavier Becerra

by Rick Cohen

A FORMER LEGAL SERVICES attorney, California Congressman Xavier Becerra is the only Latino on the House of Representatives Ways and Means Committee. But it is his distinctive voice and perspective, not his ethnicity, that has vaulted him to a position of visibility on issues of charity and philanthropy.

The Ways and Means Committee is the House counterpart to the Senate Finance Committee and has oversight authority for the accountability and performance of the nonprofit sector. Since the 2006 elections made the Democratic Party the majority party in both the House and the Senate, the Ways and Means Committee has held two subcommittee hearings, chaired by Georgia Congressman John Lewis, ostensibly to explore the extent to which nonprofits and foundations address the needs of the poor.

The two hearings were brief and not noticeably geared toward devising specific steps for action. Still, Becerra made a mark with his polite but pointed questions, which zeroed in on a core issue in charity: who benefits from the activities of charities and foundations? Over the years, few of Becerra's colleagues have asked this question; they have generally been willing to accept the notion of charity as inherently and automatically a mechanism of broad social benefit.

Congressman Becerra asks hard questions of the nonprofit sector, but he graciously accepted an invitation to answer some almost-as-hard hard questions from *NPQ*'s *Cohen Report* recently.

The Cohen Report: How do you see nonprofits making a difference in society that is distinctive, important, and indispensible?

Becerra: I think they are the vanguard in getting society to move toward social change that is of benefit to the citizenry. It is a result of charitable contributions that we find ourselves moving in the directions that can be taken up by government or the private sector. Charitable organizations have the ability to go where no one has gone before.[1]

Statistics I've seen suggest that only $1 in every $10 is serving poor people or disadvantaged people. I have to wonder where the other $9 are going.

CR: Where do you see nonprofits as falling short of what the nonprofit sector can and should deliver for the nation?

Becerra: I start off with the proposition that if you're getting a tax subsidy, another taxpayer must make up for what you're not paying. That subsidy should serve a good purpose. What are we getting for some $32 billion in lost revenues,[2] lost to the federal treasury in paid taxes [in charitable expenditures]? Is it serving a good public purpose? Statistics I've seen suggest that only $1 in every $10 is serving poor people or disadvantaged people. I have to wonder where the other $9 are going. It is absolutely essential to maintain our higher education and arts institutions. We have to know whether it's worth giving up $32 billion [in tax revenues] when only $1 in every $10 reaches or serves [the poor and disadvantaged].

CR: The Ways and Means Committee seems to have made poverty and poverty alleviation major issues for the nonprofit sector's attention. What do you think nonprofits can and should do to address poverty or, perhaps, the root causes of poverty?

Becerra: That's a core question. I'm not asking a symphony or art museum to start giving away 10 percent of its budget to the poor, but if you're getting phenomenal dollars to have this museum, you should make sure you're reaching out to the greater public, that the circle you're reaching helps a lot of the taxpayers who are forgoing other opportunities that could have been had had that $32 billion been available to the [federal] treasury [as tax revenues]. There's a lot that has to be done. The nonprofit world is our vanguard in getting us as a society in new directions that benefit the government in better ways, but we must do the oversight [to ensure] that the money is well spent. We must do much better oversight [of charitable expenditures].[3]

CR: The Ways and Means Committee has made an issue of the racial and ethnic diversity—or shortcomings in diversity—of the nonprofit sector. What concerns do you have about nonprofit diversity, and what do you think nonprofits should do to increase the diversity of their staffing and governance?
Becerra: Intense concern. All of the studies indicate that people give to that which they know. The closer a project is to your circle, the more likely it is to receive a contribution from you. Who you know, what you know, determines who you give to and what you give. When you have a lack of diversity in the organizations doing the charitable work, maybe there are concerted efforts to reach out, but the facts speak for themselves. Too often disadvantaged communities are left behind. To some degree, it's not just that those communities aren't getting the support; they aren't getting the attention *and* the support. Look at how these entities that are receiving the tax deduction are utilizing their resources, and you will see a direct correlation between those that are diverse and those that are doing good a job of reaching those in need. I don't think that [making charities more diverse] is Congress's job, nor should it be. We can't be the human resources office of nonprofits. That takes government too far. The sector has to control itself and act responsibly. It is important to recognize that the taxpayers have agreed to cover the cost of that deduction. We [in Congress] have to report back to the taxpayers on the use of the charitable money: How did that $32 billion get used? If someone comes from a poor neighborhood in town [and asks], "How did you use my [tax dollars]?" I want to be able to say, "Take a look at the book." My message to the charitable community is, "You're going to speak for yourself, your book of facts will determine how Congress will react."

CR: There has been discussion of narrowing the federal nonprofit tax exemption. What kinds of nonprofits do you think deserve tax exemptions? What kinds of nonprofit activities or nonprofit beneficiaries would you take into account in tightening or focusing federal nonprofit tax-exemption eligibility?
Becerra: I'd say it could be the opposite. What's over the horizon could be of value. I could see expanding it if we're getting a lot more for our dollar than we're giving up. If we're seeing [charitable] dollars directed to activities or populations that people could pay for on their own, why are we using tax-exempt funds to do that? If the working guy making $50,000 can't take advantage, that taxpayer has a legitimate right to ask [why] you're letting someone take advantage of things that he wouldn't be able to take advantage of. That's why the oversight is important. The facts should speak for themselves if [charitable expenditures are] not serving a good purpose. If you don't police your own, you're going to be policed. We want to make sure we're doing good by using taxpayers' dollars to offer this $32 billion subsidy. To me it's a matter of having the charitable community explain what's working, what's getting better, how we can help. I'm not going to pass judgment on what [are] good and not-good investments. Let's let the facts speak for themselves and show what's working and not working, and [then] determine what needs to be done.

If we're seeing [charitable] dollars directed to activities or populations that people could pay for on their own, why are we using tax-exempt funds to do that?

CR: Together, foundations and universities currently control well more than $1 trillion in tax-exempt endowments.[4] Foundations are required to spend (not grant) 5 percent of their assets annually, universities and other public charities have no minimum spending requirement. What would you change, if anything, regarding the government's oversight and mandatory spending standards on tax-exempt endowments?
Becerra: I'm completely open, I'm not going to pass judgment, I'm not going to take a particular position. When I heard the [tax-exempt endowment] numbers, it alarmed me, but I don't wish to direct the charitable sector to act. I just want to make sure that these tax dollars we're forgoing are used by these charitable entities in the best way possible. I couldn't tell you what percent should go out. I don't want to see [a situation] where they've depleted their assets. But the whole area of administrative overhead we should examine.

CR: Congress has faced a consistent litany of newspaper headlines about nonprofits misusing funds and behaving unethically, ranging in recent years from the United Way of the National Capitol area in Washington, D.C., to last week's headlines about veterans' charities.[5] Do you see government—particularly Congress—as having a role to play in increasing nonprofit accountability?
Becerra: There are some fabulous things being done [by charitable organizations], and at the same time I've heard some that aren't. It goes back to what I've been saying. I don't think we've done enough oversight to dig deeply enough into some of these areas: administrative overhead, salaries, and particular types of nonprofits. We haven't done our job to be the overseer

for the American taxpayer for those funds. I would love it if there were a news article that would make people give more. The charitable sector and foundations are far more nimble than government. They become the pioneers and vanguard to how we as a society move forward. The last thing we want to do is to discourage Americans from charitable giving.

CR: In both the House and the Senate, questions have been raised about charities and foundations linked to members of Congress, such as Tom DeLay, Rick Santorum, and others. As part of congressional ethics and lobbying reforms, should there be new standards or rules for charities associated with members of Congress, and if so, what might they be?
Becerra: I think if you end up having a very transparent process, if the books are open, you wouldn't have to worry if some member of Congress is involved [with a charitable organization]. Sunshine is a big disinfectant. There shouldn't be more preference for charities because of the involvement of politicians. I'm on the board of the Smithsonian,[6] and I'm a member of the Congressional Hispanic Caucus Institute,[7] which is a 501(c)(3). We do great work, we do raise some pretty decent money. We should all be open to scrutiny. We should be prepared to open up our books. [People should be able to] ask whether this is a valuable tax expenditure, that we're doing things that people find of value. It is a legitimate question: by requiring that names [of donors to charities associated with members of Congress] be named, are we helping or hurting the cause of raising charitable dollars? If someone is involved in an activity [that] could influence policy making, that might be different. That really needs some strong scrutiny.

CR: What should government do to help and promote nonprofits?
Becerra: First, try to do whatever we can [to ensure] that sunshine is taking through all the windows so that society can see which [charitable organizations] are doing phenomenal work and which aren't deserving. [Second, government should] try to partner if possible with the charitable world to harness the energies that this world can open up and get society to move in the right direction.[8] To give a tax break to some organization that would do what government would have done, but do it in a more nimble way, in a new-world way, that's a great government investment. [Government should be] getting people to give to the cause, giving them a little break, incenting an activity to help be more efficient with the taxpayer dollars that we do direct [to charities].

I know some folks are afraid I'm doing this for wrongheaded reasons or may jeopardize the charitable world's ability to function, but I see this as a way of perfecting and expanding the charitable world and getting rid of the deadwood.

Sunshine is a big disinfectant. There shouldn't be more preference for charities because of the involvement of politicians.

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Congressman Becerra's concerns may be characterized as a focus on the ability of the nonprofit sector to contribute to social and economic *fairness* in our society. He doggedly raises the issue in congressional hearings, eliciting odd responses from witnesses who don't quite seem to get it. At a House Budget Committee hearing on September 20, 2007, he asked the comptroller general of the United States whether "we're getting our dollars' worth. . . . I'm wondering how many of those charitable contributions end up helping people who are poor, helping people who have no health care." In response, the congressman got answers about commercial activities and Unrelated Business Income Tax (UBIT).

At the July 24, 2007, hearing of the Oversight Subcommittee of the Ways and Means Committee, Congressman Becerra cited pictures of ostensibly nonprofit-owned BMWs and questioned whether charitable funds meant for the poor are really going to the poor. "How do you do decide what is charitable?" Becerra asked. "Helping the poor? Helping children? Housing for disadvantaged people? Opera? Is there any way that we track what is being given charitably to different types of entities?" The witnesses responded with discussions of board oversight, fiduciary responsibilities, and executive compensation. But for the most part, he missed Becerra's point about whether charitable giving results in greater resources for the poor and disadvantaged.[9]

Xavier Becerra's congressional district covers parts of Los Angeles that are urban, low income, and primarily Latino. In fact, as of the last census, the congressional district has the highest proportion of noncitizens. These aren't academic concerns. Congressman Becerra is channeling the real-life concerns of the people in his district regarding whether the charitable dollars they see flowing around them in Los Angeles are addressing their needs. No doubt Becerra speaks for more than poor Angelenos in asking that the nonprofit sector be measured against benchmarks of social justice.

Endnotes

1. Interestingly, as an example, Congressman Becerra didn't focus on charitable activity in his Los Angeles district, but rather on the work of the Ford Foundation overseas, which has demonstrated a commitment to social change and innovative initiatives that the congressman finds laudable.

2. In response to a request from the *Cohen Report*, Congressman Becerra's staff provided a link to the *Joint Committee on Taxation's Estimates of Federal Tax Expenditures for Fiscal Years 2006–2010*

(Washington: U.S. Government Printing Office, 2006), which cites $35.93 billion in charitable tax deductions (by itemizers) in 2005 (table 3, p. 45), though that number excludes the significant amount of charitable contributions made by individuals and families who do not file itemized federal tax returns.

3. As an example, Congressman Becerra compared charitable deductions to the deduction for mortgage interest and property taxes. He said, for example, that Congress has to examine the mortgage tax deduction which "costs a pretty penny" to ensure that it is doing something worthwhile. As the Congressman put it, "Just as we would examine the mortgage interest tax deduction to see if it serves a charitable purpose, the same kind of oversight is needed on the charitable exemption."

4. Becerra politely corrected us, noting that public and private charities harbor $2.5 trillion in endowment assets.

5. Philip Rucker, "Study Faults Charities for Veterans: Some Nonprofits Shortchange Troops, Watchdog Group Says," the *Washington Post* December 13, 2007 (www.washingtonpost.com/wp-dyn/content/article/2007/12/12/AR2007121202657.html).

6. Becerra is the lead sponsor of H.R.512, which would establish the Commission to Study the Potential Creation of a National Museum of American Latino Heritage. The legislation passed the House and was introduced in the Senate by Ken Salazar of Colorado.

7. The Congressional Hispanic Caucus Institute (www.chci.org) is chaired by Congressman Joe Baca of California.

8. Becerra referenced the work of nonprofits in addressing the problem of AIDS early on, leading to opportunities for government to learn what should be done, resulting eventually in the passage of the Ryan White Act and other initiatives.

9. Of the witnesses, only Independent Sector's Diana Aviv caught his point and addressed it: "The reports that we have are that the funding going to low-income organizations from individuals is much lower than the funding going to arts and culture institutions and higher-education institutions. So, when we see even the money being flat or slightly going up, that doesn't tell the full story until we look beneath the surface to see. One of the reasons why organizations serving low-income people are so concerned is partly because of individual donations not coming in their direction, and partly for concerns that other government priorities are not allowing public funds to flow to them so that the needs of their constituents or their members are rising, and there isn't the funding to support them."

Rick Cohen is the *Nonprofit Quarterly*'s national correspondent.

What is your take on Congressman Becerra's point of view? Should the nonprofit tax exemption be reexamined? Do you have follow-up questions regarding this story? Let us know at feedback@npqmag.org. Reprints of this article may be ordered from http://store.nonprofitquarterly.org, using code 150112.

In the Next Issue

What tools do you have in your financial toolbox and are you prepared to use them? What better time for a refresher? Plus: A board's guide to surplus and deficit. Supplement: Avoiding an employment lawsuit.

ARNOVA Abstracts

ACCOUNTABILITY & ASSESSMENT

Bob, Clifford (2007) *NGO Representation and Accountability: A Skeptical View*. Working paper. Available at SSRN *http://ssrn.com/abstract=1023021*

The author argues that "most NGOs represent only themselves, if the term is defined according to its ordinary meaning in democratic politics. [but] . . . NGO accountability is less of a problem than often believed, and attempts to increase accountability should be implemented cautiously, particularly for advocacy NGOs." [*from the SSRN website*]

ETHICS & VALUES

Cheverton, Jeff (2007) Holding our own: Value and performance in nonprofit organizations, *Australian Journal of Social Issues* 42 (3): 427–436.

"This essay explores the role of values in relation to nonprofit organizations' performance. . . . Despite calls for nonprofit organisations to become more 'business-like, this essay argues that the third sector's performance is directly related to the mission driven nature of our organisations."

FOUNDATIONS

Kramer, Mark (2007) *From Insight to Action: New Directions in Foundation Evaluation*. (Boston: FSG Social Impact Advisors, 56 pp.) Available at http://www.fsg-impact.org/app/content/ideas/download/488.1 *

Based on nearly 100 interviews with foundation leaders and evaluators, "This report highlights emerging approaches to evaluation in the field of philanthropy that increase the effectiveness of both foundations and their grantees."

FUNDRAISING

Bekkers, René & Olaf Crutzen (2007) Just keep it simple: A field experiment on fundraising letters, *International Journal of Nonprofit and Voluntary Sector Marketing* 12(4): 371–378.

In a controlled field experiment at the national level in the Netherlands, the authors sent nearly 90,000 fundraising letters to determine "how the use of a colour picture in fundraising letters affect response rates and the amount donated in a fundraising campaign."

Karlan, Dean & John A. List (2007) Does price matter in charitable giving? Evidence from a large-scale natural field experiment, *American Economic Review* 97(5): 1774–1793

"Using direct mail solicitations to over 50,000 prior donors of a nonprofit organization, [the authors] tested the effectiveness of a matching grant on charitable giving. [They] find that the match offer increases both the revenue per solicitation and the response rate.'

GIVING & PHILANTHROPY

Wiepking, Pamala (2007) The philanthropic poor: In search of explanations for the relative generosity of lower income households, *Voluntas* 18(4): 339–358.

The author tests the relationship between income and giving "with the Giving in the Netherlands Panel Study (N=1,316). [She] does not find an effect of income on the probability of giving, but a consistent negative effect of income on both total and religious donations as a proportion of income."

GOVERNANCE & LEADERSHIP

BoardSource (2007) *Nonprofit Governance Index* (Washington, DC: author, 21 pp.) Available at http://www.boardsource.org/dl.asp?document_id=553 **

This report provides nonprofit leaders with benchmarks against which they can measure their board's performance. Based on a survey responses from 2,152 nonprofit leaders, almost equally divided between CEOs and board members, summarizing their self-evaluations. [*Quote from BoardSource website*]

Godel, Linda J. (2007) The how, why, and when of using multiple corporate structures, Philanthropist (21)1: 18–35.

"Part I of this article outlines a variety of reasons why charities may wish to consider using different [corporate structure] vehicles. Part II presents the main vehicles that may be used in the [Canadian] charity context and the risks and/or pitfalls associated with them."

Grant Thornton (2007) *The 2007 Grant Thornton National Board Governance Survey for Not-for-Profit Organizations* (Chicago, IL: author, 20 pp.) Available at http://www.grantthornton.com/staticfiles/GTCom/files/Industries/NotForProfit/07_BG_Survey.pdf **

"Responses to the 2007 web-based survey [on board governance practices] were received from 603 not-for-profit chief executive officers, chief financial officers, and board members of higher education institutions, trade and professional associations, social and human service organizations, religious organizations, cultural organizations, and foundations." [*from the Foundation Center website*]

SOCIAL ENTERPRISE & SOCIAL ENTREPRENEURSHIP

Haugh, Helen (2007) Community-led social venture creation, *Entrepreneurship Theory and Practice* 31 (2): 161–182.

"This article presents findings from a qualitative study of the inception of five community-led nonprofit social ventures, producing a model of the stages of venture creation: (1) opportunity identification, (2) idea articulation, (3) idea ownership, (4) stakeholder mobilization, (5) opportunity exploitation, and (6) stakeholder reflection."

Leadbeater, Charles (2007) *Social Enterprise and Social Innovation: Strategies for the Next Ten Years*. (London: Office of the Third Sector, 17 pp.) Available at http://www.cabinetoffice.gov.uk/third_sector/Research_and_statistics/social_enterprise_research/think_pieces.aspx *

"This paper argues that government needs a framework for social innovation in which social enterprise is likely to play a critical role. Social enterprise policy needs to be framed within a more comprehensive strategy for social innovation that is designed to deliver social impact by finding new ways to address unmet social needs."

TECHNOLOGY

Seshadri, Srivatsa & Larry Carstenson (2007) The perils of e-mail communications in nonprofits, *Nonprofit Management and Leadership* 18(1): 77– 99.

"This article highlights the challenge faced by leaders and managers of nonprofits to be direct, yet polite when not communicating face-to-face with their stakeholders." It is based on lessons learned by of one of the authors "from a series of personal and damaging e-mails" in a global nonprofit.

Verclas, Katrin (2007) *Is Mobile Fundraising the Next Frontier for Charities*? (Williamsburg, VA: Philanthropic Research, Inc., online, not paginated). Available at http://www.guidestar.org/DisplayArticle.do?articleId=1182 *

The author explains how mobile phones can "be leveraged for a just-in-time contribution when a potential donor is inclined to give—say, upon seeing a particularly effective advertisement or appeal?"

ARNOVA
Association for Research on Nonprofit Organizations and Voluntary Action

ARNOVA is the leading U.S.-based national association—with international members as well—of scholars and practitioners who share interests in generating deeper and fuller knowledge about the nonprofit sector and civil society. This ongoing work of inquiry, conversation, and practical improvement is carried on through its network of over 1000 members, its journal (*Nonprofit and Voluntary Sector Quarterly*), and its annual conference. See www.arnova.org.

The Take-Away

by the editors

Powerful Nonprofit Leadership: The *D* Factor
by the editors
Our country is not well served by an alienated and inactive citizenry. Traditionally, nonprofits have been local schools for people's active involvement in public life—places where people can hone their skills for public dialogue and collective action for public benefit. But many nonprofit leaders are not attentive to building this civic engagement, instead building organizations that serve rather than engage. This leaves our jobs half done.

Boards and Leadership Hires: How to Get It Right
by Deborah Linnell
How a board handles leadership transitions can have powerful and long-lasting effects. In this article, Deborah Linnell, author of "Founders and Other Gods," takes on the reasons why boards may approach the process largely unprepared and she examines common mistakes and provides practical advice on how to avoid them. A must-read for boards no matter how close or far from a transition.

Gap or Pap: Generational Differences at Work
by Jennifer J. Deal
Conventional wisdom about the dynamics of the nonprofit workplace would have us believe that a great generational shift is under way and that the up-and-coming have a fundamentally different set of values and expectations of their work environments. Enter Jennifer Deal's recent publication *Retiring the Generation GAP*, a book that draws on nearly seven years of research—much of it among people working in nonprofits—regarding the generation gap. Deal argues that conflicts attributed to the generation gap are more often based on power differentials and the abuse of power. In an extensive survey of what workers in all generations value in the work environment, she finds little difference between them. The next time someone chalks up conflict to the generations, look for the power dynamics beneath.

The Bright Future of Community Building
by Bill Traynor
Over the last several years, practitioners, funders, and policy experts have been exploring a broader approach to community redevelopment, which includes an aggressive effort to develop the civic and social infrastructure alongside the physical. Long-time activist and thoughtful practitioner Bill Traynor explores the root of this trend and the emergence of pseudo-community organizing efforts that have grown in response to the desire simultaneously to strengthen community fabric and physical space. He uses the lessons of this recent period to posit that new thinking and practices are needed which embrace the challenge of rebuilding civic life, arguing that community builders must create the deeper relationships that will eventually form strong networks for change.

A Leader's Guide to Executive Coaching
by David Coleman
For struggling nonprofit executives, sometimes it's simply a long, slow twist in the wind, with no one there—or no one capable—of providing help and support through what seem to be unsolvable problems. Lots of us have been there. Reading a book or attending a workshop might be a nice educational pick-me-up, but not necessarily a reliable path through the nonprofit management thicket. As an alternative, some nonprofits have called on external executive coaches to work with nonprofit leaders to overcome leadership gaps, skill mismatches, problems in navigating rapid organizational change, and to tap underdeveloped skills. An experienced executive coach sought by nonprofit and business insti-

tutions, David Coleman provides a roadmap for nonprofits contemplating coaching as a response to executive performance questions.

The Nonprofit ED's First 100 Days
by Oliver Tessier and Ruth McCambridge
The first 100 days represent a critical time in the life of a new leader in a nonprofit organization. Like the first several weeks of a new presidential administration, this period provides an extraordinary opportunity for a leader to gain credibility or embarrass himself and create resistance. How leaders use those first few months is critical, as internal and external observers watch to see what they do. Authors Tessier and McCambridge walk us through the critical steps and questions that every new executive should ponder when assuming a new leadership post and offer anecdotes and lessons that demostrate how others have handled this transition.

The Evolution of Nonprofit Management Programs
by Judith Millesen
What's new in nonprofit management education? A lot, as it turns out. Interviews with educators from programs around the country reveal a field that is experimenting with new ways to serve and adapt to student needs, to a changing nonprofit landscape, and to new technology. The interviews reflect a great deal of variation between programs as the result of different approaches to education, different populations, and resources.

Just Another Emperor? The Myths and Realities of Philanthrocapitalism
by Michael Edwards
Michael Edwards, veteran foundation officer and student of the nonprofit sector claims that the burgeoning field of venture philanthropy, social entrepreneurship and the like (which he terms philanthrocapitalism) has been hyped without evidence and poses a possible threat to the nonprofit field if it is embraced without question. In examining the trends and evidence, Edwards asks, "Could it be that civil society can achieve more impact on capitalism by strengthening its distinctive roles and values than by blending them with business? Are civil society and business just different ways of answering similar questions about production and delivery, or are they asking different questions about society altogether?" His answers to these questions take this important debate about nonprofit identity and role in democracies to its next level.

Volunteer Management: Once More with Meaning
by Jennifer Woodill
What's wrong with the way most organizations view volunteers? According to Woodill, a volunteer manager herself, the model of "human resources" misses the point and the power of volunteers. While most organizations try to fit volunteers into specified roles and using particular skills while turning away those that don't fit, the author maintains that they lose more than just free workers, they lose a fundamental source of strength. "Social exclusion is an inevitable result of conducting volunteer management based on the principles of *efficiency, resource development, and control.*" The author proposes a new approach in which "the emphasis is on social inclusion and community development."

A Conversation with California Congressman Xavier Becerra
by Rick Cohen
Hailing from Los Angeles with a background as a legal services lawyer, Congressman Xavier Becerra is focused on nonprofits and foundations, asking what and how they address the nation's critical social issues. The Congressman, a member of the Ways and Means Committee of the U.S. House of Representatives, sat with Cohen Report author Rick Cohen to explain his concerns about how charitable giving and nonprofit programs and services should be reaching people in need. In 2007, Ways and Means subcommittees held hearings on nonprofit sector issues, with Congressman Becerra playing a lead role in asking cogent, well-prepared questions without accepting evasive, incomplete answers. In this interview, the congressman asks what the nation gets for the more than $30 billion in charitable deductions taken every year, how much of charitable giving is reaching the "poor and disadvantaged," how transparency helps in presenting the nonprofit case, and what might be appropriate roles for government to spur more nonprofit attention to minorities and the poor.

Eliminating Random Acts of Kindness by 2010
by Phil Anthrop
Once again on the front lines of the nonprofit sector, intrepid reporter Phil Anthrop takes readers to the bleeding edge and beyond. From the fertile minds of the Young Social Entrepreneurs Network has arisen an idea whose time has come: a National Bureau of Evaluation. The bureau will guarantee unbiased evaluations of nonprofit and philanthropic projects in part by ensuring that its evaluators are insulated from the pernicious influences that run rampant in the industry by giving them high salaries and lifetime appointments.

Classifieds

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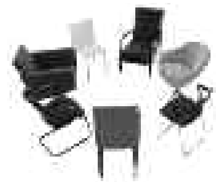

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NONPROFIT RESOURCES

Impacting Social Policy: Understanding Advocacy
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recurring loops of program redefinition, strategic restructuring, refined guidelines and jolly whatnot," she says.

"The jaded, so-called leaders in this field are so used to the current arrangements," Rodriguez continues, "and are so rewarded by its hypocrisy, that they never question why poverty and disparity are increasing as their humanitarian efforts are so richly rewarded."

Echoing criticisms raised at numerous conferences, the report cites the need for a professional cadre of evaluators as esteemed as accountants, who every day are trusted to crank out critical numbers.

"We've put millions into small-scale community development, middle-school enrichment, and youth mentoring," she says. "It's like picking winners in a lottery: yes, we helped that kid, that neighborhood, that school, but what about the 98 percent of kids, neighborhoods, and schools not part of our model? Does anyone seriously believe our own rhetoric about the effect of these random acts of kindness on the larger society?"

"Shouldn't we try to influence policy or assess the actual replication? No, instead we constantly move on to the next 'promising result': a polite fiction of new "initiatives" always too early for serious measurement, but reliably offering heartwarming delusion to obscure the larger problem."

Jeff Goldheart, the president of the Promising Results Foundation, agrees, noting, "Of course we hate it when people call foundations dilettantes. We are more than that. We care about frank results, and I firmly believe that the new Bureau of Evaluation will show that."

The hint of scandal in the report caught the roving eye of Senator Wendel Weedley, ranking Whig member of the Senate Finance Committee, with jurisdiction over the IRS and, consequently, over tax-exempt organizations. Senator Weedley announced hearings to inquire on the whereabouts of evaluation reports filed with foundations.

In a letter from Yusef Arak, the president of the Council of Large Foundations (CLF), which recently relocated to a 41,500-square-foot headquarters in Crystal City, Virginia, the council questioned the need for the Bureau of Evaluation. "As the venture capital of social progress, as society's passing gear, foundations innovate by looking forward, not obsessing in the rear-view mirror. The many demands on foundation program officers and trustees, including compelling programs and networking receptions held by more than 120 foundation affinity groups, causes us to discern that our time is best spent exploring new opportunities. Nevertheless, we see grantees' reports as a treasure trove of critical information—a virtual Alexandria Library—which is why foundations insist that these reports be filed; indeed, we are quite rigorous about this," the letter states.

"It's like picking winners in a lottery: yes, we helped that kid, that neighborhood, that school, but what about the 98 percent of kids, neighborhoods, and schools not part of our model? Does anyone seriously believe our own rhetoric about the effect of these random acts of kindness on the larger society?"

Opposing the bureau was not easy for CLF. "If there were any practical way for everyone to contribute, we of course would support that, but that's just not in the cards," the letter emphasized. "These institutions represent the best of America, going back to the Declaration of Independence, which is why we now call ourselves 'independent foundations' instead of 'private foundations.' Each foundation has its own calling, its unique mission," the CLF letter emphasized.

Not wanting to offend the powerful committee chair, CLF announced that it would "go on record that it will immediately establish a new foundation affinity group on this very important topic."

In its own letter to the committee, the National Committee of Ungrateful Grantees supported the *Manifesto* and proposed paying for its cost through a square-foot fee on foundation presidents' offices, a 25 percent tax on investment fees paid by foundations, and a 50 percent tax on foundation catering expenses.

Senator Weedley responded with a press release announcing his plans to introduce legislation to include the National Bureau of Evaluation as well as the public disclosure of evaluation reports. "I'm pleased that our committee markup will include a way for every foundation to contribute and keep its independence. Our House colleagues have agreed to a one quarter percent increase in the excise tax on the net investment income of private foundations starting in 2010."

Senator Weedley directed the last section of his communication to the Council of Large Foundations "Please don't be offended that federal law still defines your members as 'private foundations'; you have convinced me to add the word *independent* to make this new entity the 'National Bureau of Independent Evaluation.' This additional quarter percent will raise $100 million per year, or enough for 400 independent evaluators at the same salary and lifetime appointment as federal judges."

Thrilled with their success, Tonya Gallagher-Ross of the Young Social Entrepreneurs declared, "Now is the time for action—yes we can! Our network will do whatever it takes to identify a diverse pool of wicked-honest evaluators!"

Phil Anthrop is a consultant to foundations in the G8 countries.

Eliminating Random Acts of Kindness by 2010

by Phil Anthrop

Seventy-five percent of foundation grants could be best described as random acts of kindness—surely benefiting someone, but so fragmented that their net effect is no greater than randomly distributing grants among all eligible organizations.

—Young Social Entrepreneurs Network *Making Change Manifesto*, 2008

When Tonya Gallagher-Ross and her young colleagues looked at the landscape of what passed for rigorous thinking and evaluation in the nonprofit and foundation field, they were appalled.

"Do we get evaluations that are scientific? Are they valid? Are they believable?" she asks. "Sadly, few are credible. Not deliberately false—just that the underlying premise, the data collected, the research methodology, the assessment criteria and the logic model are all wack!"

"We've all seen it," she continues. "At the research conferences, at the bar afterward. We're asking, 'How did this project ever get funded? What were these people thinking? Does anyone actually read these reports?'"

Frustration with what it saw as an entrenched and essentially corrupt system led the Young Social Entrepreneurs Network, an online community of some 4,000 members, to issue its *Making Change Manifesto*. "When we looked underneath the rock for why the same organizations kept getting the largest share of foundation and government dollars, we saw that the inertia is cemented by reassuring, so-called evaluations, said Neil Perrigo, founder of the Toledo Social Innovation Center. "Frankly, these evaluations go looking for positive results, so that's what 95 percent of them report. No one sets out to be compromised, but if you run a consulting firm that wants to be in business for more than a year, you need to keep customers satisfied."

The solution? A systematic reform of all nonprofit and government program evaluations by the new National Bureau of Evaluation, with 400 highly compensated evaluators, complete with a requirement that evaluation reports financed by tax-exempt funds be made available on the Internet.

Perrigo insisted that he did not question the professionalism and intellect of the current set of evaluation companies but said, "Humans being human, it is too much to expect that the business realities of future contracts don't enter into the results."

The solution? A systematic reform of all nonprofit and government program evaluations by the new National Bureau of Evaluation, with 400 highly compensated evaluators, complete with a requirement that evaluation reports financed by tax-exempt funds be made available on the Internet.

The National Bureau of Evaluation was envisioned as a system to render fair and honest judgments free from fraud employing a framework analagous to those used by goverments to maintain fair judicial systems. The bureau drafted a proposal that copied a key element from judicial impartiality: insulation from bribery either through elections or tenure, such as lifetime appointments at a decent salary.

"We figured the easiest way was to just use the same compensation and benefits package as the federal judiciary," Gallagher-Ross says. "Yes, we know that high-end consultants and foundation staff can earn more than that, but we're in the same boat as the judiciary—who no longer talk about comparisons to the private bar, since their former law clerks earn more than they do their first year out." (Incidentally, U.S. federal judges currently earn $165,200 a year, the same as members of Congress, and pending legislation would raise that to $233,500.)

Manifesto co-author Rodriga Rodriguez was biting in her criticism of foundations. "We are all about reducing philanthropists' angst over lack of results, which has led foundations into

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