We Want to Be Efficient, but We Want to Matter: How Big Picture Learning Leadership Designed an Individual Donor Management System Utilizing Tenets of the Organization's Culture.

Citation

Tavares, Melanie S. 2019. We Want to Be Efficient, but We Want to Matter: How Big Picture Learning Leadership Designed an Individual Donor Management System Utilizing Tenets of the Organization's Culture.. Doctoral dissertation, Harvard Graduate School of Education.

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We Want to Be Efficient, but We Want to Matter:
How Big Picture Learning Leadership Designed an Individual Donor Management
System Utilizing Tenets of the Organization's Culture.

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by

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To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
Doctor of Education Leadership.

April 2019

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ABSTRACT

"We want to be efficient, but we want to matter." Elliot Washor, Cofounder, Big

Picture Learning.

The Revenue Act of 1954 established our current tax codes including section 501(c) for exempt organizations. As of 2015, there were 1.56 million tax exempt nonprofit organizations in the United States. Many of these organizations must rely on fundraising to deliver on their core mission.

The stress endured by nonprofit leaders has a direct correlation to their organization's operating reserves, making fundraising one of the most taxing elements of a nonprofit leader's role. Building a collective approach to fundraising and designing systems and resources that support an organization's fundraising efforts can amplify progress and reduce leader burnout, but these solutions must be reflective of the organization's culture to take hold.

Organization Lifecycle theorists contend that as an organization matures, building the systems required to keep pace with the demands of fundraising can strain existing resources and structures and precipitate fears associated with organizational change. This capstone will examine how Big Picture Learning utilized stage-based organization lifecycle theory and reflective practice to develop fundraising processes, workflows, and structures that emanate from the organization's values-driven culture.

INTRODUCTION

The Big Picture Company, dba Big Picture Learning (BPL), is a 501(c)(3) that was recognized by the U.S. Internal Revenue Service as a tax-exempt organization in 1996. The BPL organization holds to the core values championed by founders Elliot Washor and Dennis Littky. These values—learning and growth through exploration, experimentation, and discovery—are deeply embedded in the organization's work and inform the innovative and entrepreneurial culture. BPL has carved out a niche supporting educators and education systems in the development of learning environments that reflect these values around the world.

BPL has schools and affiliates in 26 U.S. states and an extensive international community that includes Australia, Belize, Canada, India, Israel, Italy, Kazakhstan, the Netherlands, and New Zealand. There are multiple entry points to working with the BPL network of "Schools, Innovation, and Influence." Adults interested in learning more about the BPL approach can attend the annual international Big Bang Conference on Student Centered Learning, or they can visit schools and learn from practitioners and students across the network. BPL supports the network via coaching and school-design contracts with local schools and districts that want to adopt their approach to working with students. Though the majority of Big Picture Learning schools serve students at the high school level, a number of schools are designed to serve students in the middle and elementary school grades. Each school contract is allotted a number of coaching hours, depending on the priorities outlined. BPL also offers adults in the network a substantial professional development support system. This includes asynchronous learning opportunities via Learning Big Picture, an online professional development tool and community designed to

support educators and education teams in their quest to provide internships and personalized learning experiences for students. College UnBound is another innovative outgrowth of BPL that is focused on working with adult learners who have faced significant barriers to college success. The design of College UnBound flows from the BPL approach by "coordinating courses, field studies, and in-depth project work to help students develop field-specific knowledge and skills that encourage deep learning" (College UnBound website, 2019).

Play is an evident, entrepreneurial, and innovative practice that BPL staff is encouraged to pursue. In the "10 Expectations" for students that are championed by the BPL approach, Play is described as "opportunities to mess around and experiment in learning and work. Having the time to explore, experiment, and discover" ("10 Expectations," 2018). The organization supports staff interests and harnesses their talents to areas of need that also seem to be a good personal fit. Over the last 24 years, BPL has made its mark by helping educators tackle the challenges inherent in creating this type of learning space for students. They note that "learning how to do that productively is difficult because the organizational structures and cultures of most schools are antithetical to messing around" ("10 Expectations," 2018). The BPL organizational culture very much mirrors elements of the "10 Expectations" by providing a collaborative work environment where processes and policies are meant to guide and support the individual staff member, rather than to constrain learning and innovation via a rigid structure.

Although supporting schools that adopt the BPL approach remains a major part of the organization's work, in recent years, the organization has also embraced the role of

influencer, thought leader, innovator, and advocate for an equitable, student-centered educational experience across sectors. BPL has a longstanding reputation as an agitator of the education system whose approach results in transformative learning experiences for students and educators. The organization's leaders have presented TEDx talks and headlined large national educational convenings, including South by Southwest and iNACOL. Students in the network frequently give presentations about how BPL has changed their lives.

Innovation and influence are present throughout BPL, from the use of media resources to spread the message about the design elements to the development of technology to build the education sector's capacity to scale internships. BPL is continually expanding its influence and network by developing new relationships, partnerships, and learning initiatives, such as Seed to Table, Harbor Freight Fellows, Here to Here, Deeper Learning Equity Fellows, and College Unbound. In this growing role, BPL continues to push the boundaries of who is considered an educator, expanding the definition to include mentors and advisors. In addition, its development of technical applications like ImBlaze, which enables students, teachers, and mentors to document and communicate about their internship experiences, creates a platform for critical conversations about where and how learning takes place.

Although the organization has always held to these views, there has been an intentional shift toward engaging in a national dialogue around the principles that make the approach a necessity for young people and for society. The recent redesign of the BPL website, which moved from a description of the approach to a collective call to act on what

the organization stands for, is further evidence that BPL is expanding the definition of what it means to receive an education and reevaluating the role adults and young people play in their learning experiences:

> It is our vision that all students live lives of their own design, supported by caring mentors and equitable opportunities to achieve their greatest potential. We move forward prepared to activate the power of schools, systems & education through student-directed, real-world learning. We are activists. (Big Picture website, 2019, para.1)

During the last five years, in addition to its work with schools and educators, BPL has undergone a transition in leadership from operating under the cofounders' to being led by new co-executive directors; has developed new and innovative products, programs, and services; and has experienced significant growth in its influential work. Any one of these changes could prompt a need to reevaluate how an organization's norms, values, and systems can be adhered to within the emerging context. According to Dr. Susan Kenny Stevens, author of *Nonprofit Lifecycles* (2002):

> As nonprofits become more aware of what makes them who they are, they become less dependent on individuals and more method oriented. Thus, a distinctive style which might have been associated with or developed by an individual staff person gives way to an "approach" or a "methodology" that is now transformed into an organizational hallmark, or "brand." (p. 32)

This is a transformative time for the organization, and there is rightfully concern among some BPL staff that developing new structures and workflows to guard, support, and grow

the "brand" could have a negative impact on the values of the founding culture that set BPL apart from others in the field.

BPL Cofounder Elliot Washor believes that management systems and structures cannot direct the work or inhibit the learning process from unfolding. His statement, "We want to be efficient, but we want to matter," during the unveiling of a new management tool during a staff meeting served as an unambiguous directive to ensure that the organization does not forget its founding roots. Thus, trying to strike a balance between the values the organization was founded on and the systems, functions, and processes needed and inherent in organizational maturity is a leadership dichotomy worth exploring. Will systematizing increase rather than remove constraints on organizational capacity? Can it create the right conditions for growth? Could systems such as those needed to support fundraising accelerate BPL's influential work by improving the organization's financial sustainability as it takes on new and different roles in the sector?

BPL's IT and internal communications teams are revisiting existing resources to determine how to provide greater flexibility and capacity to the network. This includes updating and improving internal communication and project management systems by introducing tools such as Zoom, Wrike, and Salesforce. Is it possible that these tools can remove cumbersome barriers and time constraints, which will allow for more spontaneity and a greater focus on what matters most to the organization? Though the updates seem to be an adequate response to a need, even such simple changes can reverberate throughout an organization's culture and practice, and the aftershocks could send the organization into a state of contemplation about what it is and where it is heading. Leaders who fail to

understand that this is part of a nonprofit organization's lifecycle may miss an opportunity to surface and reflect on this process objectively, instead remaining stalled in their development. This will inevitably increase tension in key areas of the business, including administration, funding, finances, governance, marketing, and programs.

Fundraising is an area of business that must adjust to the new demands of a more mature organization and keep pace with new and emerging organizational opportunities. BPL leadership (the co-executive directors, chief program and strategy officer, board, and founders) have prioritized an increase in unrestricted funds in an effort to build capacity and position the organization for sustainable growth and innovation. The BPL board has made it their fiduciary priority to ensure long-term financial sustainability by requesting that the organization's operating reserves keep pace with budgetary growth. In service to this priority, my strategic project at Big Picture Learning was to conduct an initial assessment of the organization to identify elements of a "culture of philanthropy." A well-established culture of philanthropy would result in the staff and board being able to confidently articulate the financial goals, individual donor strategy, and milestones to be reached, in addition to being able to understand how each member's unique strengths, networks, and contributions would support the organization's financial sustainability.

In this capstone, I describe, analyze, and reflect on my leadership at Big Picture Learning. The next section of the capstone is an excerpt from my oral defense on April 12, 2019, followed by implications for self, site, and sector, and a conclusion. The appendices include more detailed information related to my strategic project, including a review of the

research and practice-based knowledge that informed my work, as well as a more detailed

description of what I accomplished.

Excerpt from 4.12.2019 Defense, with minor edits for clarity

Melanie: First I want to start by telling you a little bit about the title of my capstone, *We Want to be Efficient, but We Want to Matter*. This is actually a quote from Elliot Washor, who is the cofounder of Big Picture Learning. It matters to me to have this quote because during one of my first staff meetings at Big Picture Learning, somebody was introducing a new structure that was going to roll out, and Elliot kind of piped up. And of course, we were on Zoom, so it kind of looks like The Brady Bunch with everyone in little boxes. Elliot piped up and said, "This is great. We want to be efficient, but we want to matter."

And that stuck with me. It stuck with me for the entire project. And for the first part of my residency, I thought, "I'm not really sure what he means by that." There were a lot of Elliot-isms and I knew that I would figure it out eventually.

But what it came to mean to me later on was that we have to root everything that we do in our values. And so, this is my journey, my learning experience with Big Picture Learning, as I helped them design an individual donor management system and think about a culture of philanthropy.

Big Picture Learning: who are they? Well, they're a group of amazing people who come together to work with school systems and design education around student-centered learning. I could tell you some of the logistics about the organization, or details like, they have a budget of $7.4 million. There are

22 employees. They were established as a 501(c)(3) in 1996. But what I really want to tell you is that when they get together, magic happens. Because what they're really doing is breaking down barriers to ensure that young people have an opportunity to have their voice heard in their education experience. And we know that this is not easy work. This is not easy work because the system is not structured for students to have that space.

So why did I choose Big Picture Learning? For those of you who were a part of the Marshall Ganz course in the beginning of our experience together, you remember that I gave a speech about how me and my mom, who is here today, accidentally started a youth program out of our apartment in the projects. And what I loved about Big Picture was that it reminded me of this experience. This experience for us was messy. It was new. It was what Big Picture Learning calls "muddling through." And it was an opportunity for me to go into a learning space, into an environment, where they were actually going to value the fact that I was trying to figure things out.

And I remember thinking back to when my mother and I started the program. We knew nothing about 501(c)(3) status or fundraising. All we knew was that we wanted to do the work, and that's what mattered to us, and we would figure the rest out later. And that was the environment that I was interested in learning in.

Second, I wanted a national perspective. I had led nonprofit organizations at the state and local level, and I was kind of curious about what leading a national organization might be like.

And finally, I really wanted to work with a diverse staff and leadership. I had noticed that when I started out, and I was working on the front lines in youth development work in nonprofits, I was surrounded by a lot of diversity, there were people that looked like me, there were people that had my same lived experience. But as I rose through the ranks of nonprofit leadership, I became more and more isolated. And over the last eight years, I was the only woman of color in leadership for four levels down. And before that, I was the only woman of color that had led that particular organization in its entire existence. And it was a lonely place to be. It wasn't something I was interested in replicating, so it was very important to me that I chose an organization that was going to be diverse.

So, let's talk about my strategic project. The way that this came about was over a couple glasses of wine and dinner—the way all strategic projects should begin. One of the things that I love about Big Picture Learning is that they really value what their employees are interested in. And so they encouraged me to come up with an idea for a project. And of course, I promptly pushed back and said, "What is it that you need? I've done a lot of work in nonprofits, and so you tell me what the need is in the organization, and I'll figure out how to learn from it. I haven't done it in this context, so it'll be new learning for me."

They said, "We want to increase our unrestricted funds with a focus on expanding our individual donor pipeline." And I thought, "Okay, I'll do anything but that." But I smiled, and graciously said, "Yes, of course. If this is what you need." Inside, I can tell you that the dread I felt was all the way down to my toes.

I wasn't sure if they knew it yet, but I knew what they were asking was going to be a lot of work. It wasn't going to be the kind of work that I was worried about on the technical side; it was the soul work that I was going to have to go back and revisit. This experience was a do-over for me. There's a lot that goes into this work, and we're going to explore that as we move on.

Secondly, Andrew, the co-executive director, wanted to explore what building a culture of philanthropy might look like at Big Picture Learning. And this was actually of interest to me. This is a term that's been kind of kicked around a lot over the last 10 or 15 years, especially in circles of funders and fundraising professionals. And people talk about this "culture of philanthropy," but nobody really knows what it is. Some people say, "Well, it just means that everybody in the organization asks for money." And I wasn't quite sure that was the definition. I wanted the opportunity to explore.

It wouldn't be a true Melanie presentation if we didn't have a mindful moment. So, I'm going to ask everybody to take a minute and close your eyes. I want us to get grounded in what the next part of this presentation is about.

I want you to think about something that is really important to you, something you love to do, something that you may have started doing from a very early age. And as I'm thinking about the people in this room, I think that could be music. It could be writing. It could be working with young people. It could be working with adults who work with young people.

And when you have that, I want you to open your eyes again. Okay. Now I want you to look around the room, and I want you to think of three people in this room you could go to right now and ask to invest in that thing that you love the most. And while you're doing that, there are a couple of questions I want you to consider. One, how do you know which three people in this room would be interested in what it is that you love? Two, what is it that you would tell them about what you love so that they would invest? And three, how do you know how much to ask for, and what would you do with it if they gave it to you? Do you want to expand and have more people do what you do? Do you want to get better at what you do?

I want you to carry that context with you throughout this presentation, because what you have just entered is the life of a nonprofit executive director. And what that means is, most of us, we started what we did because we loved it. We were good at it. And as we got better and better at it, we kept getting promoted until before you know it, somebody said to us, "Why don't you lead this organization, because you're really good, and you really love this thing that you're doing." And then the next day, they said, "You now have to raise money in order to keep this thing going." And you know what you

realize? You haven't been trained or prepared for this in any way, shape, or form throughout your entire career.

What does that lead to? Well, in Daring *to Lead* (2011), a national study of executive directors of nonprofit organizations, I found this quote, and I wanted to include it here because it was so much a part of my own lived experience as a CEO:

I don't know if I'd call it burnout but more **panic**. The 3:00 a.m. stuff for me is, my gosh, how are we going to find the money? And the feeling that it's very personal. That it will reflect on my leadership, but also that it will affect people who are doing really amazing work—people who I don't want to let down. More important than my own ego is that. I think what I am really talking about is **fear.** (Cornelius, Moyers, & Bell, 2011, p. 5)   Now why is this important? It's important to understand that fundraising is such a big part of a nonprofit's work and such a big part of the nonprofit leader's job, that when somebody is asking you to help them increase the amount of money that they bring into the organization, they are carrying a heavy weight, and they are not alone. Because in the same study, they talk about a correlation between an executive's anxiety and the size of the organization's operating reserves.

An operating reserve is basically a nonprofit's savings account for a rainy day. Except funders don't give organizations money to put in the bank for a rainy day; they give organizations money to do the work. So that means executive

directors are left with the responsibility of trying to figure out where to get this money.

To prepare for my project, I had to do a review of Knowledge for Action. That's just a fancy way of saying I had to do some research. There were three areas that I was really interested in. I wanted to understand the evolving role of donors. I also wanted to understand if there was a common definition of a culture of philanthropy that already existed.

And I also had an interest in organizational lifecycle theory. And although it would benefit this particular project, my interest in organizational lifecycle theory actually started when I realized I was going to have a dual residency. As part of my dual residency, I actually had a very unique vantage point. I was with Big Picture Learning, who's been in existence for 24 years, and I was with another organization, Education Reimagined, based in DC, who recently received their 501(c)(3) status in January of this year. This was a good opportunity for me to understand how organizations develop and mature, and how leaders need to be thinking ahead for each stage of an organization's life.

So, let's talk about the evolving role of donors. I had a wonderful opportunity to spend some time with New Profit, which funds Big Picture Learning. And I had an opportunity to see a new hybrid form of funding in action.

It was very different from when I was leading nonprofit organizations because this new way of funding actually is about a partnership. It's about a funder coming forward and saying, "I don't just want to understand what it is you do and do well, I want to understand where you have challenges because I have access to more resources than just the money. And I want to engage in this with you as a partner, and we're going to work together and figure out how you can do more of this and how you can do it better, because our outcome really is that you stay in existence to continue doing the work that you're doing."

And I was curious, are nonprofit leaders really ready for this new type of philanthropic relationship? And the reason I ask is because my experience as a developing nonprofit leader was to assure funders that everything was great—to give them an anticipated outcome and keep them as far away from the organization's challenges as possible.

So now what we're telling leaders is that in addition to having anxiety about bringing in the money, you have to figure out how to navigate conversations about what you're challenged by in an effort to have them invest. This means you have to be transparent, and you also have to be vulnerable.

What exactly is a culture of philanthropy? I still don't really have a concrete definition, but Jean Bell, an industry expert and author of *Underdeveloped*, a report based on a survey of 2,700 nonprofit executive directors and fundraising professionals, does (2013, p. 3). She says that you can see that

there's a culture of philanthropy when everybody in the organization is engaged in relationship building. When they can articulate a case for giving. When fund development is viewed as part of the organization, and it's not a separate function. When systems are established to support donors, and when the executive director is committed to and personally involved in fundraising (Bell, 2013, p. 3).

This is what that might look like in practice. Go back to thinking about the thing that you love and go back to thinking about when I asked you how you would figure out who it was that you would bring in to get involved and invest in what you do. In a culture of philanthropy, it might look a little like this: I might say everybody who loves music, get together. And when everybody who loves music is in a circle, I want you to figure out what it is you all bring to the table. And one person might say, "I'm a musician so I can actually play the music and have a concert." And then somebody else might say, "I know a lot of people who love music and would appreciate that I invited them to the concert," and somebody else might say, "While we're there I can get up and make a speech about how music is impacting the world."

This is the difference between one person holding all of that weight, anxiety, and responsibility and the entire organization coming together and finding and contributing what they're good at, not just asking for money.

As I was preparing to walk into this project, I needed to find something that would articulate the operational and leadership challenges an organization may face as they prepare to embrace a culture of philanthropy. And in my research, I came across one name fairly often. Dr. Susan Kenny Stevens, Ph.D., introduced me to a new way of thinking about how organizations develop, and that they develop kind of like people. She described seven stages that organizations go through and uses five capacity builders to define the competency framework for each lifecycle stage (Stevens, 2002, p. 13). As an organization develops, you want these functions to kind of move through a process. She also recognizes that they don't all move together at once. She also says that an organization isn't actually just going to be in one stage at any given time—the goal is to try to get these functional areas to sync up, because that's when an organization is in a state of homeostasis. Things are all moving together and functioning well.

So, when I took a look at Big Picture Learning, I thought, "Okay, where could I imagine that they are right now in this lifecycle?" Because it's going to matter if I have to start developing systems and thinking about how this might impact the organization, especially because I value the culture here— it's what brought me to this organization, and it's not something that I want to have negatively impacted.

I decided to take a look at what the challenges were in each stage of Dr. Stevens' lifecycle model, and I came up with growth as the stage BPL is in. There was significant evidence to back up my thinking. Number one, Dr.

Stevens describes the organization as having too much to do and too little time. She says that when an organization is transitioning into growth, this is exactly what it feels like every day. An organization is established, people know it for what it does, and they know what it does well, and they want it. But the organization also has this chronic under-capitalization for all the operational elements—you know, all those un-sexy things that people don't want to fund, like the legal fees, or the accounting payroll process.

Developing board ownership was the second challenge listed. I had the opportunity to sit in on a board meeting very early on, and at that board meeting, the board President was introducing a new governance structure. They were moving from more of an advising governance structure to a committee-based one, and a committee-based governing structure means that each member of the board sits on a committee and actually leads and drives the agenda of the board meetings, and they all report out on these different functional areas. To me this meant the board was taking ownership. This was another sign.

Beginning to formalize organizational structure was another challenge noted. In my time with the organization, I noticed there were new software programs, applications, and technology that were brought in to support organizational functions. They were using a software program called Wrike to do project management, and people were experimenting with ways to document workflows. So, I knew that they were beginning to formalize.

The next challenge noted was the organization becoming comfortable with change. If you consider the previous two challenges, there is a lot of transition. So, becoming comfortable with change is something an organization has to grow into because at this point, you're going to start to feel a rub. Things that you used to be able to do with a handshake, or phone call, or over a cup of coffee, now might have to take place through a Google Doc, or a shared drive. This can make an organization start to feel a little uneasy about what's happening to the culture.

And finally, it was definitely evident that the organization was diversifying revenues and thinking about different approaches to managing their cash flow. Part of the reason I had been in the meetings referenced earlier with New Profit was because Big Picture Learning had developed a new mobile application that could be used by educators, mentors, and students to communicate when students were at internships outside of the school building. It was also a way for them to document their time and learning. Because this was a new type of innovation for the organization, they were trying to figure out what the business plan should be, and how they should fund it. These were all indicators that the organization was primarily in growth mode according to the lifecycle definition.

In order to move the project forward, there are three bodies of work that I engaged in. The first was to start learning about the organization with the organization. The second was to build a donor management system

prototype. The third was to design individual donor strategy sessions with the leadership team.

When I talk about learning with the organization, I am referring to the first two months doing whatever the staff needed me to do. If they said, "We want you to come to Big Bang and serve as an advisor," I jumped on a plane and went to Big Bang and became an advisor. I didn't know what I was doing, but that was part of the beauty of being at Big Picture Learning. They don't care if you don't know what you're doing—they are going to help you learn as you go.

I also spent some time with the board and had additional opportunities to learn from one of the board members and other key stakeholders. I was talking with funders and individual donors about their expectations, about what they felt they wanted their relationship to be with Big Picture. And all of this funneled down into three things that I felt I should be able to address at the end of the project.

The first was to have a clear understanding of the fundraising goal. Each one of these constituents had an interest in what the fundraising goal was and how we got to it. Next was to have a clear understanding of the individual donor cultivation process. During interviews, people were curious and would mention that although they wanted to tell the organization when they know somebody who could give money, they first wanted to understand what the

organization would do with that information. They wanted to see process and understand the process.

The third was the need for clarity about the systems and resources needed to sustain a robust donor pipeline. And that one will really came from the board, who wanted a mechanism to know when we have donors, where they are in the pipeline and how we plan to move them through the giving process.

This last point required me to better understand what a donor management system entailed and why it mattered. A donor management system actually isn't one system. The donor management system is a series of functions, each with its own process and purpose to help get a donor in the door and to stay with the organization. But the interesting thing is that it actually doesn't start with the donor, it starts well before a donor ever walks into the door, or even before you're thinking about who the donor is. It was important that I had a good understanding of what this system looked like for two reasons.

One, I needed to demystify the process. I needed to make this idea about "just bringing in the money" more explicit and concrete because thinking about bringing in millions of dollars is scary. But you can start to break it down and say, "Wait a minute, there are actually 12 functional steps here, and each one of these steps has steps behind it. And people have done it before, and we can figure it out, and more important, we can figure out how to make it our own." I wanted to allay some of the fears I heard in my staff

conversations—concerns about what it meant to raise money and whether the organization would expect them to ask.

The second reason was the need to consider what resources had to be invested. Each one of those functions requires people power, technology or some other type of resource to support it. It was important that I had spent time with Big Picture Learning understanding what resources they already had, so we could design a plan and build the system. I didn't want to outsize a solution or waste resources on unnecessary tools or roles when what we needed was an immediate and appropriate response.

The next step was holding individual donor strategy sessions. These were really my sacred place. Of all the things that I did for this project, the individual donor strategy sessions were the most transformational and powerful to me. This was a place where we started to examine our own identities and relationships to money, power and wealth, and how it impacted the way we viewed fundraising.

This is where the project went from technical to adaptive change. I knew that, technically, I could look to see what could be pulled off of the shelf in terms of best practice. But what we needed to understand was what it felt like to stand in front of a donor who is wealthy, white and male even when, in my case, I still felt like a poor kid who grew up in the projects and doesn't know how to have this conversation because it seems that we have nothing in common. I also bring that with me to my leadership. It's who I am. It's

part of me. I wanted to open up a place to have those types of conversations with the leadership team because I remembered having that identity-related stress as a CEO and nobody else around me could understand it. There weren't other women of color in leadership around me that shared my lived experience, and I couldn't have those important conversations. So, I wanted to create a sacred place for us to have those talks.

I also needed a place to talk about my research and keep the leadership team up to date on my progress. And finally, I couldn't design any of these systems in a vacuum. I wanted my recommendations and the resources I developed to be uniquely suited to the co-executive directors and the job that they had to get done. I wanted to create resources that would help to make their job easier. And in order to do that, I wanted to make sure that they had a say in how things moved forward.

So, what were the results? At this point we have a prototype for a donor management system that's ready to be tested. Workflows for the 12 functions of the system are in some form of a draft, based on what we prioritized, and I will begin working with the board development committee this month. And luckily for me, the work will continue beyond residency when I transition to the board of directors at the end of May.

Starting this work for me was really about laying a foundation for what is to come because a little of this work is going to happen at the staff level, but

much of it needs to happen at the board level, and now I can continue to advocate on the organization's behalf.

Question and Answer Session

Dr. City: We do have some questions. Here's my first question. Knowing what you know now, what do you think the actual problem you were trying to solve in your residency was?

Melanie: Hmm. I think I wanted to alleviate fear. I think the actual problem that I was trying to solve in my residency was fear of change, fear of the unknown, fear of rejection. Because if you go out there and you start asking people for money, there are real fears that go along with that.

I really wanted to spend my time in residency trying to show everybody that this is doable. We can do this together as a team, not only as a leadership team, but also thinking about and including the staff and board.

When I served as a CEO and then again as a senior leader in a large nonprofit, I felt kind of stuck in between two worlds. I had a development team who needed to get donors in front of people, and I had mission delivery staff who felt exploited—they didn't believe that the development staff understood who they were and what they did: "They're just parading a crew of people in front of us, and we feel like our communities are on display."

And so, there was something about wanting to break down barriers and help people to see that this fundraising thing can and should actually happen across teams, especially knowing what we know about the levels of anxiety and the amount of stress that it leaves on the leader. So, I think for me, it was more about trying to alleviate fears, really. And to help people understand that it's possible, and it can be done.

Dr. Cohen: If you had to list off the most important things you think you learned, as a result of your residency at BPL, what would they be?

Melanie: Well, without sounding cliché, it's that you can be efficient, and you can matter. That was actually a big part of my learning. Because the second part of that quote, by Elliott was that "the learning actually takes place between the lines." And what I didn't understand at that point, which I've internalized as a result of this process is, the deliverables that I'm going to leave behind— the donor management system, the functional matrix, the workflows—are actually not what's going to change the organization. It was the process that we went through to learn about what we possessed as an organization as well as what was needed that is going to change the organization and bring about a culture of philanthropy.

So, for me, it really was learning a little bit more about adaptive change, right? I thought I had it. I thought I actually knew the difference between the adaptive and the technical, yet I had that "aha" moment that Dr. Andrés Alonso always says we're going to have in residency, the moment when I

came to understand that it was in the process of reflecting on and understanding what needed to change where the real change and the real work begins and ends with a leader.

Dr. Cohen: And what was it about the process that was so compelling?

Melanie: The process that we went through required a lot of reflection on the organization, the team, and ourselves. And I intentionally made the time, which I had never been able to do. As a leader, I didn't make the time to reflect, but as a student and a resident, I could make the time to reflect on what might be holding me back from reaching my full potential as a leader. And so that's something that I'm going to carry with me moving forward, that I have to make sure that I'm finding the time to stop and do that reflection for myself, and I've got to do it for my team as well.

During the individual donor strategy sessions, little nuggets of wisdom were surfacing in these really small snippets of time. We finally started to recognize, "Oh, hey, none of us actually wants to make a pitch to a donor. And guess what? A donor doesn't want to be pitched to, either." And there's evidence that it is actually a best practice to have conversations and build a relationship rather than make a pitch. You know, three two-hour sessions spent together wasn't a lot of time, yet it amplified our ability to do the work and really served as a driver for my personal learning.

Dr. Frishman: Thank you, Mel. First, I want to begin by expressing just gratitude. Not only the elegance in this presentation, but in your entire residency, the way in

which you entered and carried yourself and your openness to wade into questions that might have seemed like not exactly where you wanted to go, but your willingness to just jump in and learn along the way, and to bring co-constructive value, has been incredible. We didn't know that we were interviewing you to become our boss, but I'm very glad that that's the way it worked out.

So, I wanted to ask about a rhetorical question that you posed in this about why don't we say that fundraising is the business model of nonprofits? And this is related to your stepping into a role of leadership on the board and helping to direct the development committee.

I guess the question I wonder about is related to culture and culture of philanthropy. We as an organization of practitioners, we're fundamentally drawn to the work, to getting in and doing the impactful work. And yet, as an organization that's tripled in size in the last six years from a budget perspective, that also requires a bunch of additional unrestricted dollars coming in. So, I guess, on the one hand we have this point of pride of saying, "Yeah, well, we're not in the business of just fundraising; we're in the business of doing the work." And yet, we get to sort of some inflection points of growth where we have to reevaluate that.

So, I guess I'm wondering, maybe it's a preview as you're stepping into the board and the recommendations you're providing to the organization: What are the directions that you'll be suggesting and shaping, or do you think we

should have a very specific and robust fundraising function and department? Do you feel like we can spread that across and sort of through these musical concerts, as you described? Or what are the solutions you're suggesting as an organization? And I guess to add a level of complexity, is that unique then to Big Picture, or do you feel like those extrapolate out to other organizations?

Melanie: One of the experts that I quoted in the capstone is a woman by the name of Simone Joyaux, an author and Certified Fundraising Professional who talks about using a donor-centric lens (Gibson, 2015, p. 17). And that's the way that I think I would like to approach my work with Big Picture Learning. It's not by building out a separate fundraising function because I think that way of fundraising is going by the wayside—in some instances, it's already gone. This new era of partnership and this way of thinking about how everybody has a hand and a say and something of value to bring to the table when we're thinking about fundraising, is where I'd like to see the organization move.

And I think there are some real concrete strengths that Big Picture Learning already has that we could put a donor-centric lens on and keep moving forward. I think about these beautiful large national events where you can just feel the buzz of the network when everybody's together. You feel the power of the people in the network there. Wouldn't it be wonderful to have funders come, or potential investors, or people that are just interested in our work? Perhaps we could hold a roundtable discussion about the challenges inherent to our success and invite them to share solutions? It would be yet

another opportunity to see what's happening in the field and to speak with the people that are doing the work on the ground, the real power players.

With a little bit of forethought, we could invite funders or potential donors to come and watch BPL leadership and students speak about the work of the organization. Big Picture Learning speaks all over the place, all the time. And these are no small venues. I mean what about if we sent out personal notes and invites to come and see us speaking at South by Southwest or iNACOL and then invited them to a BPL networking event later on that evening?

We've also talked about expanding the role of TGIFs. Big Picture has this wonderful tradition that was started by the cofounders when they began the organization. Every Friday, they do something called a TGIF where they write about what they're thinking, what's happening, and new things that are on the horizon for the organization.

Most of the organization participates in either writing or reading these updates. I think this is a great way to tell the rest of the organization what's happening in fundraising. When BPL Cofounder Dennis Littky was going through the process of preparing College UnBound for accreditation, he actually brought us on the journey with him using those TGIFs. One week he told us, "Hey, I think we're going to have this great conversation with somebody and it might work, but I'm not so sure." And then the next week he was like, "Yeah. So now we're going to do this, but we still don't have an answer yet." He even told us about the stress he endured preparing for the

meetings. And those TGIF's helped me to see that, man, this accreditation process is not easy. I had a new level of respect for how hard he was working to get the job done. That process was also a reminder that a leader doesn't always have to have it all together or know the answers to lead.

TGIFs are one way that the leadership of BPL could bring the staff along on this fundraising journey, but it doesn't have to stop there because there could also be a way to include donors. Maybe do a TGIF once a month that's really focused on this type of communication to donors, especially if this new hybrid form of donors wants to understand the challenges the organization may be facing.

Big Picture Learning also has a great reputation for building strong, lasting, deep, meaningful relationships, and that is the best practice for engaging individual donors. So, we've got to figure out who these potential donors are, and how we connect with them to make that happen.

Dr. Frishman: And other organizations?

Melanie: One of the things that sets Big Picture Learning apart and makes you ready for this is that BPL has a values-driven and highly interconnected culture. I think building a culture of philanthropy is going to be much easier as a result of that, easier than if you were an organization accustomed to having a separate fundraising arm and a very hierarchical structure. I just think you are positioned much better.

Dr. Frishman: Thank you.

Dr. Cohen: I'm curious, Melanie. You've written and spoken about this new hybrid, this more engaged approach to philanthropy. Do you see any downside to it?

Melanie: Yes. Honestly, the challenge is walking a fine line with transparency, which means you need to have leaders who understand nuance because you want to be able to engage your staff, but you don't want to scare them, right? You don't want to tell them, "We want you to be a part of this process with us and understand all of the challenges, and by the way, we might not be able to pay you next week."

   And similarly, if we're entering into relationships with funders as a partner, we want to be able to enroll them as part of our process, but we don't want to give them control over our process. And so, this transparency piece is going to have to be nuanced. Thankfully, Big Picture Learning is an organization that likes to muddle through. So, we'll figure it out as we go. I don't know that there's a right answer, and I don't know that there's one answer with any one individual funder either. I think it's going to depend.

Dr. City: All right, let's open it up to the audience for questions. What would you like to ask Mel?

Speaker 5:   So, I sat on the other side during my residency as a funder, and I'm curious ... There's a lot of talk also right now about being founder-friendly or entrepreneur-friendly. So, I'm curious what you think that means from your

experience. You've been thinking about it. From your perspective, what can donors be doing to be friendlier as they engage in this new model of partner philanthropy?

Melanie: New Profit really was my first experience in an organization where this hybrid model was in play. But since then I've met other funders that have this commitment to capacity building with the organizations that they're funding.

I like this partnership approach, and I like the fact that a funder can come forward with more than just money because funders generally have access to vast networks of resources and experience, including consultants. Consultants are not the end all be all, but sometimes as a leader you need somebody else to come in and help you figure things out, and chances are that as a nonprofit, you don't have access to the resources or money to be able to do that. That extra money is just not there.

I think when a funder steps to the plate, whether they're supporting an individual organization or thinking about a portfolio of grantees, they should consider what they could bring to the relationship that will be of value beyond the dollars. Maybe it's the convening power, the ability to hold discussions about this new way of working together. Maybe they're encouraging more open conversations, helping people to open up about what a partnership looks like in the future of funding.

Because this is uncharted territory, I think that foundations can play a role in moving this agenda forward, by creating more of a learning environment for both themselves and the organizations together.

Speaker 6: And to me, you are ... If there was a rubric of Ed.L.D. residents ... You are just the consummate Ed.L.D. resident and, really, those letters belong after your name. You really showed what it's like to be *with*, and how that was rigorous learning, and how that was a rigorous project. And it was really life-changing.

So, given that we've got this recording here, and we've got Drew [incoming Ed.L.D. Director] over there, my question is, what is your advice to future residents? While it's fresh.

Melanie: You know what I would say is ... this whole piece about coming in as a learner. The program, tried to tell us: "There's this imposter syndrome, and you're going to feel it, but you're here to learn, and it's okay." I think there's something about continuing to take this learning stance when we go back out into the field and that it is important that we create this type of learning environment in the organizations we lead. It is actually going to be to our benefit.

It was a conscious choice for me. I had been given a real blessing, an opportunity to be able to think deeply about the things that are important to me in my leadership. And if I didn't find an organization like Big Picture Learning, I think I would not have had as great of an experience. I needed a

messy, muddily environment, and I needed to be surrounded by people that were willing to work and learn with me.

Because I didn't have a precedent for how I was going to do this, it was you guys as a leadership team that allowed me to have that learning process. I had never attempted to think about building a culture of philanthropy in an organization before. But you were there with me, making that happen. But I had to decide to do this as a learner. And so, I feel like there's something about continuing to talk with people about the fact that we are here to learn, and it's okay not to be the one with all the answers when you are in leadership.

Dr. Cohen: So, imagine yourself, six or eight or ten months from now, you're on the board, you're chairing the donations committee. And you've been successful. You've got, I'm not sure how many, donors that want to be involved with Big Picture Learning and give money.

How many donors do you think Big Picture could manage in this new hybrid approach?

Melanie: I think you bring up a good point.

So, part of the beauty of spending time with the organization and learning about their systems and their structures and their resources and their strengths, was also me thinking about their capacity, right? So, I talked a little bit about the Electrolux vs. the broom and dustpan.

Well, I'm trying to design a system for an Electrolux, but it starts with a broom. And so, my hope would be that we are reflecting on our progress as this process is unfolding. As we bring in new types of donors and donor relationships, they're going to bring new challenges that we're going to have to figure out how to meet, which means we need to design a system that's flexible and not rigid so that we can say, "Okay. All right. Well, it looks like we may need to add capacity in this particular area, or in that particular area." I'm thinking future-wise. I'm thinking big donors, but I'm building the system so that we can actually start with a few donors.

Dr. Cohen: But, it's interesting, Melanie. You used the word "capacity" several times, and one thing I think I hear in what you're saying is that in order for this new approach to work, the organization, whether it's Big Picture Learning or some other organization, will have to develop the capability to manage the donors in this much more involved way while it's trying to use their money to develop the capability to do the work.

Melanie: That's right.

Dr. Cohen: So, that's-

Melanie: That's a lot of work. And I believe that's why we need the board to get involved.

Dr. Cohen: And complicated.

Melanie: Yes, it is. It is. That is why there is this inertia in the nonprofit sector,

                because that's actually what's happening all the time right now. But nobody

                is stopping to try to figure out if there is another way that we can do this.

                And so, what you see are these studies like *Underdeveloped* (Bell, 2013), where

                they surveyed 2700 executive directors and development directors. The

                whole purpose of that study was to say, "What is the problem?" Nonprofits

                have existed since the dawn of 501(c)(3), and donors have existed since

                there's been charity, yet we're still in this bind where we can only get so far,

                and then we kind of snap back again.

                So, I think, at some point, you've got to start thinking differently about the

                way we approach the work, and I don't know that there's really a blueprint

                for it yet. I mean, I think my research into building a culture of philanthropy

                kind of showed that. You kind of know it when you feel it and you see it,

                there are the things that you're going to be looking for, but there isn't really a

                roadmap to get there. So, I think it's going to be up to us at Big Picture

                Learning to start thinking about what it could look like in a Big Picture

                Learning context. And I just think that the board should be a part of that.

                After all, the board is an extension of the organization.

Dr. City: I have time for one last question, one last answer from the audience.

Speaker 7:   Hey, Mel. Thank you for your impressive work. Thank you. Thank you. Your

                research, your Capstone, your work fills such a gap in the field, and I have a

little bit of PTSD after working at a nonprofit right before the role I'm in now, and I'm almost three months into philanthropy now.

So, after you've gotten some rest, I want to figure out how we partner and take lessons and turn this impressive work into a tool that others can be using to learn from. And the earlier question also makes me think, what's the sweet side of the message, the open letter to philanthropy and to funders as they think about their theory of philanthropy, right? What do we want them to know?

My second question, now that you're joining me on the board, when you were talking about the nonprofit lifecycle, one of the points you mentioned was developing board ownership. And we know this is not a muscle that board members exercise, typically, right? So, you're joining me really, really soon, and I want you to just talk a little bit about the work and the entry points into getting the board to take ownership of this really complex work so that it doesn't all fall on the co-executive directors to do, so they can continue to do the work on the outside. So, what are you and I going to do to build this board's capacity for ownership? Give us some details.

Melanie: Well, I do think one of the first things that we have to do is begin the conversation from board member to board member, because I think the conversation can't continue to be from the staff to the board, right? Leaders need to have allies on their board. A big part of building your board is that you're building allyship.

And so, I think one of the first things that we can do together is to form a partnership and make it a commitment that we're talking about a board's role in philanthropy, and we're talking about a culture of philanthropy, and we're talking about the challenges that are inherent to fundraising in nonprofit leadership, and we're actually making those as visible as we possibly can.

Part of what I wanted to get across in my presentation today was that there really is a heavy weight on an executive director to do this work, and I knew that because I had been in that role. You know that because you've been in that role, but the general public doesn't know that. When people come to a board, they're not coming to the board having been a nonprofit executive director. They're coming having been a lawyer or an accountant. We're bringing them in from different sectors. So really, they don't understand what the organization leader is going through to raise those funds, or what systems or resources are needed to run a $7.4 million nonprofit organization. So, I think a big part of what we can do initially is just begin some of those conversations at the board level.

End of presentation

I now conclude my capstone with implications for self, site, and sector based on my strategic project.

IMPLICATIONS FOR SELF

Examining this challenge from multiple angles enabled me to assess my own capacity as a leader in several areas, from change management to understanding the important roles that governance, communication, IT, and finances play in supporting organizational fundraising priorities.

One of my largest takeaways from this project was the importance of taking the time to consider how easy it is for decisions to be made using a subjective lens. Without taking the time to rise above the water we swim in every day as leaders, we are prone to blame our leadership, the external environment, or a lack of resources for what could be a natural and normal part of organizational growth. While researching frameworks to share with the leaders of BPL for this project, I was compelled to reconsider what practices and roles could be designed to help the leaders be more proactive in recognizing where systems, governance, leadership style, etc., stand relative to the larger goal of shepherding our organizations into full maturity. The idea that an organization is functioning within an ecosystem and has a role to play in influencing the work of the larger sector helped me remember that, as nonprofit leaders, we support and deliver on not only our own organizations' missions but on the movements we are inevitably a part of shaping and championing.

One of the most important factors in the successful outcome of the project was having another woman of color in the leadership, relatively new to the organization, as my mentor. The chief program and strategy officer had traveled some of the same paths I did in her acclimation to BPL and her new role. Through weekly one-on-one sessions, she offered me support, guidance, thought partnership, and helped me choose language that would be

universally acceptable at the organization. She served as a check and balance on how much change could be challenged and in what capacity. As someone who shared elements of my lived experience as a woman of color in leadership, she provided a sounding board and mirror for many of the doubts, fears, and frustrations that surfaced in relation to my identity as I took on this major project for BPL.

My implications for site encourage BPL leadership to be transparent in their thinking about goals and strategy as a way to encourage staff engagement in building a culture of philanthropy. I made this recommendation because of the invaluable learning I received as a result of co-executive directors Andrew Frishman and Carlos Moreno's transparency and vulnerability during this project. Their willingness to listen, learn, and provide access for me to learn from and with them in their leadership journey reaffirmed why I believe transparency and vulnerability are a valuable strength in leadership. The experience gave me an opportunity to consider the role of transparency and vulnerability in any change process and, more specifically, the value of communicating regularly. Even when my thoughts on the project were still nascent, communicating them to people I trusted or framing them as nascent for people I knew carried more insight, enabled others to help me refine my thinking about my process. As a leader, much of the data I take in is by feeling out a situation. As challenging as it is to deconstruct those feelings into evidence, I recognized that my best thinking and results came when I shared a notion or hunch and others confirmed or questioned my thinking behind it. This aided me in making my own thinking and values explicit—for myself and for others.

IMPLICATIONS FOR SITE

Integrate fundraising into the rest of the organization.

As stated earlier by fundraising expert Simone Joyaux, for an organization to embrace a shift toward a culture of philanthropy it will require the habits, functions, and processes of the organization to become more donor-centric. She adds that, when this type of culture is in place, "each volunteer and every employee feels it. Clients and donors recognize it whenever they connect with the organization" (Bell, 2013, p. 17). Fundraising is not a stand-alone program of an organization. It touches every function, team, and department and should be considered when thinking about strategy, relationships, workflows, and hires across the organization. The following are recommendations for continuing the work that began during this strategic project:

Continue to build a culture of philanthropy by connecting to the organization's strengths in relationship building.

My recommendation is that BPL continue to focus on its strength of building deep and lasting relationships that, according to Joyaux, are "not just for asking for money when it's needed" (Gibson, 2015, p. 16). In conversations with BPL donors, in research on best practices in donor cultivation, and through the work of the Individual Donor Management System (IDS) meetings, one important factor emerged: nobody wants to feel pitched to and nobody wants to make a pitch. This is great news for the BPL leadership, who have long demonstrated their strength in building authentic relationships. Prepare for conversations by understanding the fundraising goal, who the individual is, and what they may be interested in, and then let the relationship evolve, using touchpoints as gentle reminders that there is still an outcome to be had from these exchanges. Industry standards say that it takes 12-18

months on average to build a strong donor relationship. In that time, it is important to harness all the resources the organization can bring to bear to demonstrate the power of the network. Create more opportunities to meet with students in their learning environments and to speak with principals, advisors, and mentors. Send personal invitations to potential donors to participate in think tanks or see BPL leaders present at critical national or local convenings about the impact of BPL's role on the sector. Perhaps even design "partnership tracks" for donors at BPL national events. These actions all build on the existing influential functions of BPL's work in the field and would be easy to engage staff and board members in as well. With a lens toward building deep donor relationships ("How would I explain this to a donor? What would a donor be interested in?") and a little advance work, BPL could capitalize on many of its existing resources and practices to engage donors more strategically.

Identify both the human and technological resources needed to manage a robust IDS that works for senior team.

My recommendation for the site is to identify a fundraising "cadence" and build a system that starts each year by identifying prioritized fundraising outcomes during the budgeting process. Using a donor-centric lens, BPL leadership can then begin working with key staff (communications, IT, finance, and program) and board members (development committee and board president) to identify the habits, operational adjustments, resources, and workflows that are needed to move the organization toward its goal. To do this, I recommend that BPL continue to identify and document processes, people, and resources that are in place and determine how to remove any obstacles to adopting new workflows and/or ways of thinking about engagement with donors. Identifying obstacles or gaps will enable the organization leadership to strategize which changes in work patterns need to become the norm, thus making the new way of work easy and accessible. I began this work

by documenting key questions and research about BPL's fundraising process in a matrix as a way to easily identify patterns, gaps in resources and people power, and existing best practice in one place. This is a process that can be done annually in relation to the budget. With each cycle, additions and changes to the existing workflows can be prototyped, documented, and implemented, and then revisited before the process begins again with the next budgeting cycle.

Demystify the fundraising process by continuing to build on existing practices that connect to the identity of the organization.

By making the elements of the fundraising process explicit, we can break down the challenge into what it really is—a series of manageable steps. My first attempt at creating a visual to explain an Individual Donor Management System (IDS) had a lot of detail, which laid the foundation for me to explain and acknowledge each step in the process. Creating a visual also made my thinking and understanding explicit. From there we were able to truncate and refine, and in some cases even rename and norm. This practice can be replicated with staff and can be utilized to introduce other new and complex ideas.

Communicate regularly about fundraising efforts.

The staff may not be aware of how hard the leadership team is working on fundraising. Dennis and Elliot, cofounders of the organization, are masterful at using their weekly TGIF's to talk about burgeoning relationships and big wins, but also about the tough battles ahead and how they are thinking and feeling about them. This is a great way to keep staff informed about both the good and the challenging parts of fundraising with individual donors and allows them to offer help and insight. Communicating the small wins in addition

to the big ones will help the staff see progress toward the outcome and build momentum behind the goal. And don't be afraid to talk about the "ones that got away." Transparency about the more challenging aspects of fundraising helps to build common understanding about the reality of the time and work it takes to cultivate donors and the circumstances that can affect the outcome of a successful ask.

Amy Edmonson and Sara Singer, co-authors of "Confronting the Tension between Learning and Performance" (2019), offer examples of corporations that engaged staff in that critical learning loop. The article highlights:

UPS practice of allocating protected time for each of its drivers to express concerns or make suggestions. IDEO, brainstorming about problems on a particular project, often enables engineers to discover ideas that benefit other design initiatives. At Toyota, the Andon cord, which permits any employee to halt production, enables continuous improvement through frequent investigation of potential concerns (para. 36).

These examples offer some insight into the ways staff could embrace the challenges of fundraising and also be part of the solutions, thereby continuing to engender a sense of transparency and collective learning.

Prioritize time for reflection and strategy as individuals, a leadership team, and an organization.

Although an issue may be common to many organizations, a solution can be designed that truly reflects the values of a particular organization. The purpose of the Individual Donor Strategy sessions was to provide time to surface and reflect on those

values as a leadership team. Some important data emerged during those meetings, and I was able to tie some of those *aha!* moments to best practices in the field. Find ways to elicit why the values of the organization are important to each individual, what success could look like, and why that matters to the organization. Then design your goals, strategies, and tactics within that authentic space. The resources and workflows you design as a result will have a better chance of reflecting those values. Workshops like the rituals, routines, and resources presentation at the Leadership Conference provide another way to bring staff together to co-construct systems based on shared values.

"Organize to learn, then organize to execute."

What practices can BPL institute to learn whether the existing resources and workflows are supporting and reinforcing the tenets of the organization's culture? Edmonson and Singer argue that:

> such a managerial approach organizes people and resources for second-order learning that challenges, reframes, and expands possible alternatives. Practices involved in organizing to learn include promoting rather than reducing variance, conducting experiments rather than executing prescribed tasks, and rewarding learning rather than accuracy. (2019, para. 30)

These practices undergird and reflect the values championed by BPL while also proffering yet another way to think about the learning value of systems. Some examples of this in my own learning experience include organizing and reviewing the information in the matrix. Even in a rudimentary way, I was able to surface and assess gaps in my understanding and share some basic information with the team. This process surfaced the

available human and technological resources, those still needed, and what additional research was needed to fill in the gaps. This resulted in more focused conversations later in the process such as when I reached out to my colleague for advice about purchasing lists of names for a database. Without those critical first steps, I would not have seen this as a gap in our understanding or known whether it was a possibility worth exploring. After gathering and reviewing this data from and with others, I began building recommendations based on both field research and my learning about the organization. Organizing to learn informed my ability to know what had to be done and gave me a sense of direction, so I could consider the resources, both human and technological, that would be required.

Be a compass in your leadership as a team and communicate your true north.

Communicate your vision, your personal values, how they are influencing your leadership and decisions, and how staff and stakeholders can align their individual strengths, resources, and networks to support organizational goals and outcomes. Be transparent about how the leadership intends to tackle challenges, what you anticipate the outcome to be, and why you have chosen a particular strategy will enable others to determine whether it is something they can get behind or may still have questions and concerns about. This approach gives individuals the gift of choice, something that is valued greatly at BPL. Communicating your thinking regularly also provides the leadership team with an opportunity to refine thinking and messaging based on the feedback received. More importantly, it makes a statement about what you value as a leader and why you are choosing to prioritize and/or tackle a particular challenge.

Chart a course for what comes next for BPL.

Will BPL's next chapter be to continue to move toward more influencing work? If so, consider using all of the recommendations above to work with staff and the board to define what that will look like for the organization and the impact BPL hopes to have on the field. Not only will this orient and socialize staff, board, and funders to proposed goals and outcomes, it also will allow BPL to consider how to fund the work and who may be interested.

Does influence mean more deliberate advocacy and policy work at the state level, something that has been a part of BPL's work with schools trying to get waivers, etc.? Is it about expanding the work of the Deeper Learning Equity Fellows as influencers in the field who are focused on surfacing and dismantling the structures that drive disparity? Is this about pushing districts to consider new ways of utilizing technology to support student internships? First, consider how current work could fall under the umbrella of a campaign and possibly be marketed to those interested in funding this type of influence. It would be a great "test" of the market!

What are the costs associated with this type of work and how do they differ from the costs associated with contracts? Identifying what BPL wants for its next chapter will be key to surfacing the impact this shift could have on the organization's finances, and on finding and attracting the right partners in support of the work.

IMPLICATIONS FOR SECTOR

The subjective lens of organizational culture

Organizational culture, while often a source of strength and pride, can complicate an organization's objectivity in assessing its progress by creating a jaded lens through which they view themselves. Without access to resources that allow them to understand how nonprofit organizations develop, nonprofit leaders often unwittingly espouse what is aspirational about their organization's critical functions rather than what is functionally accurate. The lens of organizational culture can contribute to this by impeding a leader's ability to honestly "see" and assess the critical functions necessary to carry out the organization's mission. If an organization does not look beyond the confines of their culture, they are doomed to seeing themselves through the highly subjective lens of their own benchmarks. Without the ability to reflect on their current state of resources, capacity, and processes against an ideal functional state, the organization can become stalled or stuck, thereby frustrating the staff and stakeholders. This lack of awareness can hinder a leader's ability to set reasonable strategic goals, accurately predict the organization's capacity to deliver on said goals, or to enlist the appropriate skill sets in service to those goals. Nonprofit organizations not only must have access to resources so that they can learn from others, they can benefit from understanding that their challenges are not unique. It is imperative that influencers in the field encourage nonprofit boards and leaders to reflect on the state of their organization's development and produce and fund the resources and practices needed to support it.

A call for more research on the lifecycle of nonprofit organizations

According to Brice S. McKeever, author of *The Nonprofit Sector in Brief 2018: Public Charites, Giving, and Volunteering*, there are 1.56 million nonprofits in the US (2018). Nonprofits provide critical resources and perform vital functions for our society. The 1969 Tax Reform Act gave birth to the 501(c)(3) IRS service code, effectively establishing the development of a new sector. Stevens' Stage-Based Organization Lifecycle Theory (2002) and Judith Sharken Simons' *Five Stages of Nonprofit Organizations* (2001) are two resources that the field can turn to in assessing challenges from a stage-based organizational development perspective. The stage-based model did not arise from empirical evidence and more research needs to be done to specifically address nonprofit organizational lifecycles. Dr. Stevens acknowledges that, when she began her consulting practice with nonprofits:

> The few management books I found in libraries or bookstores were geared mainly to Fortune 500 companies or to the owners of small businesses. As nonprofit management books later became more readily available, their advice and protocols still seemed better suited to mature organizations with governing boards, management depth, discretionary resources, and procedural capabilities, than the small and mid-sized clients I was consulting with at the time. (2002, p. 6)

More research needs to be done from the perspective of the nonprofit sector to determine specifically how nonprofit organizations develop differently from other types of organizational structures, and to help nonprofit leaders understand how to adjust their leadership strategies in keeping with their organization's evolving needs.

Fundraising is the business model for nonprofits; therefore, the tenets of a culture of philanthropy should be imbedded in every nonprofit organization's existing culture.

The field should consider fundraising an extension of an organization's mission and strategy. Donors are increasingly becoming both investors and partners, yet nonprofit organizations are still learning how to indoctrinate donors into their culture and to work in partnership. To enroll an outsider in its culture, an organization must be aware of the explicit and implicit elements of its culture, why they exist, and how they are communicated to those within and outside of the organization. The donor also has a role and some very specific responsibilities in terms of enlisting other donors: to understand who the organization is, to communicate what the organization does, and to describe why they have chosen to invest in their work.

Though an organization must be able to describe and differentiate their beliefs from those of others to attract donors who believe in their way of work, staff, donors, and constituents must also be able to articulate what the organization prioritizes and point out how the organization demonstrates what they value; in short, what makes them uniquely qualified to deliver on their mission. If we think of potential donors as taking on a new position in the organization, then it is important that staff and board members feel comfortable explaining who they are, why the donor should be a part of their work, and how the donor's contributions (time, resources, connections) will further the organizations goals. Moreover, the donor should be able to recognize, articulate, and, to some extent, advocate for what those goals translate into in practice. In other words, a culture of philanthropy should not be separate from the organization's existing culture. The two should be one and the same.

Fund development professionals often are brought in to "solve" the financial constraints an organization faces, as are donors. Yet an organization's fund development program touches upon and draws from every part of the organization, from budgeting to governance to program delivery. A donor-centric lens is an essential part of doing business as a nonprofit, and building the culture, systems, and processes that support this core competence cannot be an add-on or afterthought. Just as the business sector builds its culture and practices around a particular business model, nonprofits also need to consider fundraising *the* business model and build their culture and practice in service to it. This perspective does not supplant the mission; rather, the mission and business model should flow from and complement one another. Having a donor-centric lens means it is imperative that nonprofit organizations acknowledge that fundraising is core to both operations and mission delivery.

A new role for the board: Accountability partner.

Several variables can thrust an organization into crisis, such as the changing of board structure, composition, and governance; leadership transitions; the entrance of new players, new innovations, new technology, and terminology into the sector in which it operates; and changes to the available resources and policy conditions from which it must draw resources and direction. In these cases, the hope is that everyone connected to the organization understands the challenges faced by the organization and can recognize the role they can play, which is specifically to keep an eye out for these variances, feel for subtle shifts, and anticipate the impact of changes to the internal and external environments in which they have made a commitment to operate. Is this a role a board member can play? Is it possible

for a board member to have a role that holds the organization accountable, by reviewing

progress toward organizational maturity based on stage-based lifecycle theory?

If we think about the BPL board's fiduciary responsibility to ensure that the

organization's investments will yield sustainability, then perhaps the governance and

budgeting functions of the board can include an accountability partner whose sole role is to

reflect on and advocate for investments specifically targeted toward improving systems and

structures in order to bring the organization fully into the next stage of organization

development.

<u>CONCLUSION</u>

This project gave me a unique opportunity to consider leadership and change from a contextual, cultural, and organizational lifecycle perspective. The focus on fundraising and the mindset, resources, and systems needed to move an organization forward are things all nonprofit leaders grapple with but rarely have the luxury of time to ponder and reflect on.

When I began my work with the leadership team, I realized that, as important as the resources and systems were, they were not what would ultimately enable the board and staff to speak about unrestricted funding goals and strategies with confidence and excitement, nor would the deliverables, as designed, build investment from stakeholders and funders or result in larger, more frequent gifts. It was the process we went through to design the deliverables, the learning that took place for each of us in defining important elements of BPL's culture and "ways of work," that ultimately helped the leadership and staff shift their mindset, connect to the goal, and commit to the outcome. In the end, attempting to surface the source of resistance to "systematizing" helped me recognize and appreciate what Elliot Washor meant when he stated, "We want to be efficient, but we want to matter."

While there are a number of documented best practices on how to develop a successful fund development program, the key to the sustainability of that program lies in how or whether it is interwoven with the existing culture of the organization. The merging of best practice with organizational culture allows an organization to retain its niche while increasing its capacity to evolve and weather changes that are inevitable as an organization

matures. In *Beyond Fundraising: What Does It Mean to Build a Culture of Philanthropy?* Cynthia M. Gibson refers to Peter Drucker's famous quote, "Culture eats strategy for breakfast":

> [I'm] not saying that strategy is irrelevant. Rather, that the strategy a company employs will only be successful if supported by appropriate cultural attributes. Recognizing this, nonprofits with a culture of philanthropy see fundraising less as a transactional tactic and more as a *way of operating*—one that reflects the definition of philanthropy: A love of humankind and a voluntary joining of resources and action for the public good. (2015, p. 4)

In the end, I chose to be in residency with BPL because of the environment that Cofounders Elliot Washor and Dennis Littky continue to champion for students around the world: A place to "mess around and experiment in learning and work. Having the time to explore, experiment, and discover" ("10 Expectations Play" 2018, para. 1). I am excited for the next chapter of BPL and look forward to helping steer the organization's fundraising efforts from my role on the board. As I transition from doctoral resident to board member, I bring with me new learning about the role board members can play in supporting leadership, championing fundraising efforts, and anticipating the challenges and milestones organizations face as they traverse fundraising and the stages of an organization's lifecycle.

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APPENDIX A: Review of Knowledge for Action

After extensive conversations with co-executive directors Andrew Frishman and Carlos Moreno, the chief program and strategy officer Eva Mejia, and subsequent conversations with Cofounder Elliot Washor, it was determined that BPL's most pressing need was to build its capacity to increase unrestricted donations from individual donors. The broader goal of the project was to build an organization-wide, collaborative strategic focus on fundraising that would impact long-term outcomes by:

1. Conducting an analysis of trends in education philanthropy and research on industry best practice

2. Assessing the organization's strengths as related to developing a culture of philanthropy

3. Unearthing existing resources that could be redirected, repurposed, or revitalized with a focus on fundraising

4. Utilizing the findings of the first three steps to inform the development of an individual donor management system (IDS) that is steeped in industry best practice and reflective of the organization's priorities and culture

5. Helping each member of the leadership team consider their unique contribution to the development and execution of individual donor fundraising goals

In this Review of Knowledge for Action, I cover what I consider to be the most important elements of any potential change effort: a review of the relevant content, a survey of the landscape, consideration of the current organizational context, and an inquiry into what processes could both spur and support leaders' work.

I began my research by examining the current challenges facing nonprofit leaders in relation to fundraising, and the most pressing issues facing fundraisers in the field. I then reflected on my own experiences fundraising with multiple organizations and researched the definition of a culture of philanthropy. My next step was to consider BPL's organizational context. I did this by working and conversing with staff and stakeholders, and by researching the lifecycle of nonprofit organizations. BPL seemed to be in a time of transition, and I wanted to understand how or whether this could have an impact the organization's ability to fundraise. I conclude with research on the value of reflective practices in leadership.

Fundraising Experiences and Understanding "Culture of Philanthropy"

Two professional experiences have influenced my thinking about the project: (1) serving as a funder multiple times over the course of my career, and (2) spending time as an interim CEO and senior team member responsible for raising funds.

In the role of funder, I had the opportunity to see a variety of organizations in various stages of development. During that time, I realized how important established and transparent fund development goals and strategies were to an organization's successful fundraising—they served as a kind of "North Star" that was not separate from their mission. Although each organization's culture was unique, and their capacity and resources varied, conversations between staff members and funders seemed almost fluid. The leaders of these organizations also seemed to understand that two types of relationships were being formed with the funder, one based on alignment of the anticipated outcomes as a result of the funding and the other based on mutual trust and confidence that the organization had the capacity to deliver. These relationships took time to establish, and during my time as both an interim CEO and senior team member, I quickly realized how little time there was to

develop or evaluate what was necessary to build and sustain a donor pipeline. In addition to leading an organization, cultivating and retaining strong donor relationships took my time, energy, and insights.

My research on the best practices and challenges facing nonprofits led me to a study commissioned by the Evelyn and Walter Haas Jr. Foundation, titled *Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising*. A first of its kind survey of executive directors and development directors on fundraising, the report based on the study describes the challenges nonprofits face as they strive to attract the resources they need to ensure success. These challenges include: a lack of leadership and financial investment from both the board and executive directors; high turnover and a lack of qualified development professionals; lack of a shared vision, concrete development strategies, systems, and resources designed to support fundraising efforts; and, finally, the lack of a culture of philanthropy, which the report describes as:

> most people in the organization (across positions) act[ing] as ambassadors and engage[ing] in relationship-building. Everyone promotes philanthropy and can articulate a case for giving. Fund development is viewed and valued as a mission-aligned program of the organization. Organizational systems are established to support donors. The executive director is committed and personally involved in fundraising. (Bell, 2013, p. 3)

Jeanne Bell, author of the report, acknowledges that, "while familiar to fundraising professionals, the term culture of philanthropy is not yet well understood nor commonly used across the sector. Not to be confused with institutional grantmaking or the act of giving

money as a donor, a culture of philanthropy refers to a set of organizational values and practices that support and nurture development within a nonprofit organization" (Bell, 2013, p. 3) Though I had heard many fundraising professionals and CEOs refer to a culture of philanthropy, I had not fully understood the holistic perspective I would come to have about it. In fact, in my experience, it wasn't uncommon to hear staff talk of building a culture of philanthropy as if it was synonymous with "everybody asks for money."

Bell's report continues:

> Many nonprofits do not have an organizational culture that supports fundraising success. More than two out of five respondents (41%) reported having no culture of philanthropy (see previous page for definition) at their organizations. This is one area where smaller nonprofits appear to be better off than their larger peers; the larger organizations were more likely (50%) to report that they lacked a culture of philanthropy, compared to 38% of the smallest organizations. This may be because larger nonprofits create a development function that is more professionalized and departmentalized; the development team is expected to be self-sufficient rather than deeply integrated with the rest of the organization and its culture. Smaller organizations also have organizational cultures that are based on more teamwork and role-sharing, which may make them more likely to have a culture of philanthropy than larger, more hierarchical organizations. (p. 18)

As I learned more about what it means to have a culture of philanthropy, I reflected on the most successful fund development teams I've had the pleasure to work with. It wasn't long before I recognized that the most effective teams were those that drew on the expertise and feedback of multiple individuals, existing resources, and the uniqueness of the

organization as a whole. My fundraising experiences also taught me that successful efforts

had to be connected to the organization's budgeting process, involved in strategies to fulfill

the mission, and immersed in the organizational culture. As Bell notes:

> To foster and develop a culture of philanthropy, individuals' beliefs and perspectives
>
> cannot be at odds with its principles. In other words, a culture of philanthropy has
>
> little chance of taking hold when people think asking for money is distasteful or just
>
> hate doing it. (2013, p. 23)

This holistic perspective on fundraising places the onus of meeting fundraising goals

on the organization's leadership rather than on the development staff alone. It also requires

the development staff to understand the organization's mission, culture, and goals. I would

come to learn that this is the true definition of a culture of philanthropy, and I was fortunate

to have experienced it at least once in my career. In *Underdeveloped*, Jeanne Bell notes that an

organization's size can serve as an advantage to developing a culture of philanthropy. She

notes that the survey revealed:

> Larger organizations were more likely to report they lacked a culture of philanthropy,
>
> compared to 38% of the smallest organizations. This may be because larger
>
> nonprofits create a development function that is more professional and
>
> departmentalized; the development team is expected to be self-sufficient rather than
>
> deeply integrated with the rest of the organization and its culture. Smaller
>
> organizations also have organizational cultures that are more based on teamwork and
>
> role-sharing, which may make them more likely to have a culture of philanthropy
>
> than larger, more hierarchal organizations. (p. 18)

Unfortunately, I have also seen organization leaders hire a fundraising professional or adopt a fundraising strategy based on the belief that, if successful in one setting, they, or it, could easily translate into success in a new environment, with a new constituency, or with a new mission. My research into the challenges facing an organization's fund development functions led me to an article in the *Chronicle of Philanthropy* titled, "Failure of Chief Fundraisers Puts Charities at Risk" (Hall, 2012), which affirmed this perspective. The article told the tale of a fundraiser who landed a chief development job. She wowed the organization's leadership with her impressive résumé of landing big gifts and her poise and personality, but she was fired less than two years after taking the position. The article quoted a chief executive who said that "she didn't adapt well to working with senior staff and understanding their issues." The problem, he says, "wasn't day-to-day fundraising. We were meeting our goals," (para.3-4) but the fundraiser was unable to join her colleagues on the executive team in mapping out growth strategies for the entire organization. This is a reminder that a fundraising professional cannot be successful without an acculturation period, and the CEO and the fundraising team must be willing to play a role in carving out realistic financial goals in support of broader organizational priorities.

The Evolving Role of Funders

My first order of business at Big Picture Learning was to better understand the context of education philanthropy. In January 2018, I was fortunate to spend some time with one of BPL's funders, New Profit, and to learn about their role in supporting the ImBlaze platform. New Profit's relationship with its grantees reminded me of an article by Eileen Cunniffe (2014) in the *Nonprofit Quarterly* titled, "Wait—What Is Venture Philanthropy, Again?" The article described new "hybrid" forms of philanthropy that have gained traction in the wake of the Great Recession. Cunniffe described "many 'hybrid' forms of

philanthropy, some of which borrow from business thinking, most of which involve intensive up-front research, and all of which seem to move beyond the traditional 'grant-giver/grantee relationship' into capacity-building partnerships" (para. 3). My experience with New Profit and Big Picture Learning provided an opportunity to experience this hybrid type of funding, and I soon realized that the traditional fundraising landscape and rules of engagement were changing for the better.

Cunniffe (2014) also referenced a report on venture philanthropy from the Organization for Economic Co-operation and Development, which describes it as "more of a blanket term, an expression of a more purpose-, results- and responsibility-driven worldview that many foundations now embrace" (para. 4). The overlapping characteristics Cunniffe references show a trend toward longer-term and more transparent partnerships and include:

> funding mechanisms that blend grants and investments, as appropriate to the theory of change; Engagement styles that are more hands-on, using extended interactions with and sometimes between grantees; Engagement periods that reflect the goal of systems changes, often five to ten years rather than one to two years; Culture and capabilities that are focused on innovation and experimentation; and monitoring and evaluation that allows quick adaptation and focuses on outcomes and impacts (para. 5).

This new trend points to the emergence of a savvier, more invested, hands-on donor who is just as interested in the long-term wellbeing of the organization and its ability to impact a system or sector as in the outcome. To reach this new donor pool, nonprofits must

understand how to partner and recognize that transparency and vulnerability, two traits traditionally considered off limits for nonprofit fundraising, may now serve an organization and its leadership well.

New Profit embodies many aspects of this type of donor. As a partner, New Profit invests in both financing and building the capacity of its organizational portfolio, serves on the board of many organizations it supports, and assesses major areas of the organizations' governance, fundraising, and leadership. The great news is that many hybrid funders, like New Profit, want to understand the challenges and limitations their partner organizations face in order to help them improve operations and have a deeper and/or broader impact. A community foundation based in Hartford, Connecticut recently launched a social enterprise accelerator for local nonprofits with the help of a national organization called No Margin, No Mission. The accelerator's goal is simple: if the foundation is going to require the nonprofits in its portfolio to diversify their funding sources, then they should give them the tools to do so. The question is, are nonprofit leaders prepared to embrace this new type of partnership? Can they articulate their needs and challenges in a way that will encourage investment?

Organization Lifecycle Theory
> *"We are an old organization, but we are also a new organization" —Elliot Washor, Cofounder, Big Picture Learning*

While a number of different models exist, the theory behind organization lifecycles seems to follow a predictable and distinct pattern. There is a founding stage that progresses to a growth stage, the goal being to reach a mature stage. Much of the work in this area

draws from other sources and sectors and is based on for-profit business models or comes directly from practitioners in the field. For example, Dr. Stevens draws from Erik Erikson's normative stage model of human development to describe five domains of organizational development that result in seven stages. Her description follows a similar flow: stage 1-founding idea, stage 2-startup, stage 3-growth, stage 4-maturity, stage 5-decline, stage 6-turnaround, and, finally, stage 7-terminal. In a review of Stevens' book *Nonprofit Lifecycles: Stage-Based Wisdom for Nonprofit Capacity,* Murat Onder and Ralph S. Brower, from the Askew School of Public Administration and Policy at Florida State University, contend that,

> although the stage-based model has an intuitive feel to it, it is clear that this model and its components did not arise from empirical evidence. How does one know, for example, that there are seven stages, that they are specifically these seven, or that any of stages exist at all other than abstractions that emulate the ideas of Erik Erikson?…And how, one might ask, do we detect the boundaries that denote movement from one stage to another? (2004, p. 174).

However, Onder and Brower agree that, "taken on balance, we believe this book makes a considerable contribution, especially for its intended audience: leaders in the nonprofit sector and in foundations who have far greater potential to influence the world of nonprofit organizations than do those in academe" (p. 174).

Stevens (2002) lists five benefits to her lifecycle approach:

1. Providing a diagnostic starting point for capacity-building activities and engaging appropriate responses to organizational behavior
2. Setting realistic expectations for the "typical" behavior one might expect to find in nonprofit organizations at a specific stage

3. The ability to recognize when behaviors are out of sync from what might be expected in that phase of an organization's life

4. The depersonalization of organizational management weaknesses and reframing of current stage-related growing pains that are predictable for that developmental stage

5. Most importantly for this particular project, helping foundations, consultants, and others become more effective advocates for the organizations and individuals they care about

This last benefit was illustrated in my work on the project with New Profit, a major investor in BPL's work. As mentioned earlier, New Profit's approach is to serve as a "deal partner" by providing resources, board support, and coaching, in addition to helping the organization assess its capacity in key areas. One way this is accomplished is through an in-house diagnostic tool New Profit developed over time that was initially used to get to know each new partner that entered the New Profit portfolio. As time went on and the portfolio grew, there were more opportunities to use the tool to compare an organization's capacity in key areas to that of others in the portfolio, which allowed indicators of organizational growth to emerge. The tool now serves as a resource both the organization and the investor can use to determine the organization's greatest needs and capacities, and to tailor a unique approach for coaching and support.

In her book, Stevens references Larry E. Greiner's theory on organization growth. His article, "Evolution and Revolution as Organizations Grow," is considered a *Harvard Business Review* classic that was first published in 1972 and reprinted in 1998. Greiner's model differs from Stevens' in that he identifies five phases of growth, each of which culminates in

a "crisis" or "revolution." His theory is that, to move to the next stage of evolutionary growth, an organization has to resolve the challenges inherent in the current phase. The result is a solution that will work only until the next crisis occurs, due to the constraints of the previous crisis solution.

While Greiner's original model of growth has a more linear approach, Stevens' model is more fluid and allows a practitioner to self-diagnose and prioritize, based on a number of factors. Stevens' model does not require an organization to resolve one phase of growth before it can enter the next. She contends, rather, that an organization's growth phases overlap and that systems may lag in one area and be further ahead in others. In the 1998 reprint of his *Harvard Business Review* article, Greiner wrote a commentary, "Revolution Is Still Inevitable," as an update of his 1972 observations. In his commentary he noted that, "although scholars debate the precise length and nature of these phases, everyone agrees that each phase contains its own unique structure, systems, and leadership" (p. 64).

Greiner also acknowledged that "the phases are not as cleanly marked off as he depicted" and, in his estimation, "the vestiges of one phase remain as new approaches are introduced." He goes on to note that "such overlaps are most notable in the case of the first-phase entrepreneur hanging on when professional management is added in the second-phase of direction" (p. 64). Stevens has a similar perspective, stating that part of the challenge in the transition from startup to the growth phases is that, as:

> nonprofits become more deeply aware of what makes them who they are, they begin to further refine service in such a way that, organizationally, they become less dependent on individuals and more method-oriented. Thus, a distinctive style which

might have been developed by, or associated with, an individual staff person gives way to an "approach" or a "methodology" that is now transformed into an organizational hallmark, or "brand." (2002, p. 32)

While differing in their audience and their approach to an organization's growth stages, Stevens' and Greiner's models are both aligned with their belief that, as an organization develops and grows, there are challenges to resources, leadership, and management that are inherent in each phase or stage. In Greiner's words, "Management, in its haste to grow, often overlooks such critical developmental questions as: Where the organization has been? Where it is now? and What do the answers mean for where it is going?" (1998, p. 55)

Considering what I learned about organizational lifecycles, it appeared that BPL's move to advancing its approach through advocacy and influence was an indicator of what Stevens describes as a "distinctive competence that becomes a nonprofit's 'edge' and provides a distinguishing factor for internal pride and external support" (2002, p. 32). She goes on to say that "later, if successful at positioning this competence in the marketplace, distinctive competence becomes the reputation that brands the nonprofit and thrusts it into maturity" (p. 32). In addition to maturing, the organization is also venturing into a new type of work. Advocacy and influence work require a different funding strategy and attract a different type of donor. The current financial model had worked for contracts, but it could not keep pace with the additional demands placed on the resources needed to become a force of influence. Those costs tend to be more focused on core operations—salaries, travel, lodging, technology, communication—areas that are harder to cover without unrestricted income sources. Stevens also reminds us that "nonprofits in the growth stage are generally

chronically undercapitalized. They are always playing catch up, and though their product or service is in demand, growth-stagers continually struggle to find the right product mix to serve their artistic or service destiny" (2002, p. 32). This seemed to be right on target in terms of where BPL stood in relation to the organization's fundraising challenges. If the contracts and grants were meant to cover the costs associated with supporting schools and leaders, then this additional area of growth would require a different funding model. I felt that co-executive director was aware of this, as he had been talking about the organization's shift in this area. What I hadn't yet made the connection to was whether the shift was already impacting the existing funding strategy. If this was the case, simply increasing unrestricted funding would not be enough. Other changes were afoot that would need to be addressed as the organization transitioned into this next stage. Stevens (2002) explains:

> [Growth] is the stage in which, by definition, demand for service exceeds the organizations management, board, resource and/or systems capabilities. In the lifecycle model, 'growth' forces nonprofits to deal effectively (through continued adherence to mission) and efficiently (through development of internal systems) with the wider array of services they, by now, offer. (p. 32)

It now made sense that many of the organization's functions were being reviewed with an eye toward increased efficiency, capacity, and complexity. If the organization was in what Stevens refers to as the growth stage, then it would make sense that some of the existing systems and processes, and some of the existing thinking about systems and processes, would need to be revisited.

Stevens describes the growth stage as "proportionally the most expensive stage in any nonprofit's development" (p. 35). She goes on to note that:

> It is not uncommon for the administrative expense category to take a disproportionate bite out of the growth-stage nonprofit's budget. Although nobody relishes allocating hard earned dollars to administrative items, if these items are not attended to, they will impede the organization's future abilities to mature. Far too many nonprofits are stalled in the growth stage because of inadequate systems or untrained administrative staff, which end up costing the organization more than it saves by failing to upgrade appropriately. (p. 35)

Stevens additionally defines the challenges of the growth stage as:

- Having too much to do, too little time
- Developing board ownership
- Creating a program and strategic focus that does not trap creativity and vision
- Identifying distinctive competence
- Beginning to formalize organizational structure
- Becoming comfortable with change
- Diversifying revenues and managing cash flow

* adapted from Stevens (2002, p. 36)

The Role of Reflection

> *"Sometimes in order to keep moving forward, not only must you take one step at a time, but you*
>
> *must be willing to look back occasionally and evaluate your past, no matter how painful it is.*
>
> *Looking back lets you know whether or not you are headed in the right direction." — G.K. Adams*

A recent Harvard Business School study affirms something most practitioners already know: reflection plays a large role in our learning. In "Making Experience Count: The Role of Reflection in Individual Learning," researchers Giada Di Stefano of HEC Paris, Francesca Gino and Gary P. Pisano of the Harvard Business School, and Bradley R. Staats of the University of North Carolina Kenan-Flagler Business School theorize that, "once an individual has accumulated a certain amount of experience with a task, the benefit of accumulating additional experience is inferior to the benefit of articulating and codifying the accumulated experience" (2016, p. 1). Di Stefano and her colleagues define reflection as "the articulation and codification of experience accumulated in the past" (p. 3). Articulating and codifying accumulated experience is a foundation for designing organizational systems and workflows based on successful practice. However, for many nonprofits that are strapped for resources and time, the process of reflection as defined by DiStefano et al. can be viewed as a luxury rather than as part of the organization's culture.

Another benefit of reflecting for the leader of an organization is the ability to make better decisions based on resources and capacity. Harry M. Kraemer, clinical professor of strategy at the Kellogg School and former CEO of multibillion-dollar healthcare company Baxter International, speaks about the value of self-reflection in decision-making in an article titled, "How Self-Reflection Can Make You a Better Leader" (Walsh, 2016). Kraemer describes an experience where self-reflection allowed him to understand what was important

as a leader and to focus on what might be done differently:

> The company was focused on increasing its growth rate. Other firms were making
> acquisitions right and left, while Baxter was not. "So, we stepped back," says
> Kraemer, "and asked, if we want to grow externally, what are other companies doing
> that we aren't?" It turned out that the companies that were growing successfully had
> diverted resources from their core operations to establish large business-
> development departments. Baxter at the time had a much smaller department. But
> until taking time to research and reflect on the matter, "we didn't realize we needed a
> larger team of people who could fully dedicate themselves to this issue," he says.
> (para. 10)

Kraemer's experience illustrates the importance of stepping back to consider all the possible elements contributing to the success of other organizations and what it would take to produce those same outcomes for his company. I researched the role of reflection for this project as a way to support leadership in reflecting on past decisions, successes, and challenges specific to fundraising. I also wanted to provide tools BPL's leaders could use to assess capacity before charting a course, and, finally, I wanted to use reflection to examine our underlying assumptions and relationship to money, power, and privilege and how these items may be acting against our goals.

Facilitative Leadership

To encourage reflection, I drew on a variety of Facilitative Leadership experiences from my past. I was first introduced to the concept of Facilitative Leadership in 2000 when I was asked to join the National Service Leadership Institute of the Corporation for National Service.

In "The Art of Facilitative Leadership," Jeffrey Cufaude of Idea Architects illuminates the value in Facilitative Leaders focusing on building the capacity of individuals and groups to accomplish more on their own, now and in the future. Cufaude describes the essence of Facilitative Leadership as:

- Making connections and helping others make meaning.

- Providing direction without totally taking the reins.

- Balancing the management of content and process.

- Inviting disclosure and feedback to help surface unacknowledged or invisible beliefs, thoughts, and patterns.

- Building the capacity of individuals and groups to accomplish more on their own, now and in the future.

- Operating from a position of restraint.

*Adapted from Jeffrey Cufaude (2019) "The Art of Facilitative Leadership."
https://thesystemsthinker.com/the-art-of-facilitative-leadership-maximizing-others-contributions/

As a believer in the tenets of Facilitative Leadership, I hold strongly to the belief that many of the answers lie within the collective wisdom of the group. The role of Facilitative

Leadership is to create the space to draw that wisdom out and make it explicit. It wasn't until later in my career that I would learn through a combination of professional experience, executive coaching, and first year Ed.L.D. leadership coursework that my natural leadership and conflict styles focused on working toward and surfacing insights from all parties in an attempt to find creative solutions. During my project I utilized elements of facilitative leadership to move the project forward through:

- The use of active listening skills including paraphrasing, summarizing, reflecting, and questioning when I was conducting stakeholder interviews or in 1:1 meetings with organization leaders.

- Encouraging and generating participative discussion in groups sessions that I led, specifically the advisories at the conferences and the professional development session at the Annual Leadership Conference.

- Helping to stimulate creative thinking by brainstorming and other idea-generation processes in both 1:1 sessions with organization leaders and in meetings with staff on special projects.

- Stimulating the strategic consideration of alternatives and informed decision-making of appropriate choices whenever we discussed the Individual Donor Strategy and what it should or should not entail for this project.

- Designing meeting processes to accomplish a wide range of goals and objectives.

- Helping individuals and groups reflect on their experiences and capture relevant learning during the IDS Working and Reflection sessions.

APPENDIX B: Theory of Action

If I…

Learn about BPL's fundraising history and goals through conversations with donors, funders, board members, leaders, and staff,

And I **survey and document** existing BPL unrestricted fundraising resources and processes,

And I **consider** the available literature, resources, and expertise on nonprofit fundraising and developing a culture of philanthropy,

And I **utilize** organizational lifecycle theory to help organization leadership assess BPL's stage of organizational development,

And I **employ** my experience in facilitative leadership to design a series of working and reflection sessions that support BPL's capacity to develop unrestricted funding goals, and to understand the roles, resources, and responsibilities necessary to meet those goals,

Then I…

Can work with BPL staff and leadership on the design of an individual donor system that will transform the individual donor fundraising process from passive, compliant, documented efforts into a series of proactive, dynamic, interconnected functions that reflect BPL's unique relational strengths.

APPENDIX C: Description, Evidence, and Analysis of the Strategic Project

<u>DESCRIPTION</u>

I prepared for the project with three major considerations in mind:

1. The IDS needed to reflect the organization's culture, so it would be embraced; it was vital to help the organization connect the functions of the donor management system to the existing entrepreneurial and innovative values

2. Identifying existing organizational resources and practices could surface a lack of resources and a gap in practices that could not be mitigated under the current budget and/or organizational structure; this could make developing and documenting the system a longer process than expected

3. Increasing revenue and minimizing expense is a priority for the organization; a quick fix could undermine a more in-depth reflection and analysis

Learning the culture by doing

To gain a better understanding of the organization's culture and to be of value to the organization, during my first six months of residency, I made myself available to assist with or participate in organization events, projects, and meetings whenever I was needed. Participating in events and activities gave me a great opportunity to get to know people and learn what they love about their work at BPL. Because I considered reflection a vital tool in this experience, I wanted to hear from people firsthand why they were drawn to the work and what kept them there. Most of the staff had been with the organization's network in some capacity for several years. Recognizing the strength and value in that longevity, I realized that the organization had been tremendously successful and had weathered many changes to both the internal and external environments.

Seeking Signs of an Emerging Culture of Philanthropy

After my initial conversations with the BPL leadership, I took some time to understand the organization's existing fundraising capacity. I learned that donor cultivation and management were shared by the co-executive directors and cofounders, and that the organization's leaders were responsible for developing strategy, educating and engaging staff and the board, and identifying, vetting, and tracking potential donors and securing gifts.

Unearthing existing resources that could be redirected, repurposed, or revitalized, with a focus on fundraising

Recognizing the important role organizational culture would play in this project, I wanted to get a solid understanding of the organization's areas of strength. I found several to draw from; the first was building relationships, and the second was having practitioners and students tell their stories of how the BPL approach impacted their lives. The ability to connect to people in a deep and meaningful way is a trademark of the BPL approach. In *Underdeveloped*, Jeanne Bell reminds us that

> social media, online fundraising, and innovations such as crowdfunding are
> fundamentally changing the means of cultivating and retaining donors. These tools
> allow multiple staff and board—beyond a single development director—to be in
> continuous dialogue with stakeholders, a central tenet of a culture of philanthropy.
> They also have the potential to draw a new generation of activists to the
> development director role, people drawn to the storytelling and movement building
> aspects of fund development. (2013, p. 26)

I believed that, because developing authentic, deep, and meaningful relationships is also the basis for cultivating individual donors, building such relationships would be an advantage for

BPL. Ultimately, the heart of our fundraising is to advocate passionately for what we believe in and to establish and maintain meaningful relationships. I quickly observed that the BPL staff and network excelled in doing this naturally, almost intuitively. This type of advocacy was already baked into BPL's DNA and organizational culture, and it was now becoming more of a driver for their influential work.

BPL's relational nature isn't its only asset; the organization has technical expertise and resources that can be focused on streamlining some functions within the fund development processes. The director of technology and the chief communications officer have the expertise to integrate information systems and databases, and to tailor and produce resources for the leadership team. The organization also has contracts with WealthEngine, a donor research platform, and Salesforce, a customer relationship management platform, that when used together, can streamline contact management processes, and track, share, and report on donor touchpoints in real time.

My assessment of BPL's strengths included a review of the budget and revenue sources. The budget had a diverse array of revenue streams from a variety of income sources. The work was being funded by grants, donations, contract revenue, and, more recently, the development of ImBlaze, a technology platform designed to support student learning outside the classroom. At the start of my project, the business plan for ImBlaze was in an iterative state as the organization determined the best way to leverage it to produce revenue without compromising its core principles. Grant funding is robust, but it consists mostly of programmatic dollars meant to be reinvested in the work. Grant funds are largely devoted to program implementation, leaving little money to support the core administrative

functions. The efficiency of the contracting process was also under review, with an eye on minimizing the cost of doing business and maximizing investment in core operations to provide continuous improvement.

Using the assessment to inform the development of an IDS

My initial thinking was that if I could help BPL align the existing organizational resources and strengths to serve an identified fund development goal, it would increase the leadership's capacity to vet and follow up on leads in less time and improve the odds of making meaningful connections with the right prospects. My initial goal for the project was to alleviate immediate budgetary pressures while setting up the organization to have a long-term impact, financial health, and sustainability. However, my research put the time needed to cultivate new donors at 12-18 months. Given the short tenure of my residency, I had to shelve my hopes of making a short-term impact on donor prospecting in favor of the long game. I decided to focus on the development of a multipronged approach for their long-term individual donor development strategy. Four proposed tactics emerged from the initial assessment process:

1. **Develop a donor tracking system to assist the organization's leadership with prospecting, thus maximizing time for co-executive directors.** To accomplish this, I planned to work with the IT, communications, and business processes departments to establish a system for prospecting and managing leads. The proposed outcome was to develop, test, and document a process that used existing resources (WealthEngine, Salesforce), and then use the data gleaned about the efficiency of the process to update Co-Executive Director Andrew Frishman during our biweekly supervision sessions.

2. **Provide feedback to BPL regarding stakeholder priorities, level of comfort, level of transparency desired, etc.** I planned to gather this data via observations and stakeholder conversations. The purpose was to learn about the history and experience of fundraising at BPL from board, staff, leadership, and funders, both unrestricted grantors and individual donors. I also planned to interview field experts and members of the extended BPL network. The proposed outcome was a compilation of data for BPL to use in developing their short- and long-term fundraising plans. The initial documentation could also serve as a baseline to enable the BPL leadership to track any shift in attitudes or the level of comfort among staff and board regarding fundraising over time. The conversations were ongoing, and in most cases took place with individuals on multiple occasions.

3. **Document a process for drafting future strategies as new priorities and challenges emerge.** I proposed to walk the BPL leadership through a series of working and reflection meetings to surface and document concerns about fundraising, consider issues about the organization's growth, and the financial challenges that accompany organization maturity. The proposed outcome was the ability to name current processes, organizational policies, and norms (both formal and informal); to work with the leadership to identify individual strengths and collective attitudes and behaviors about fundraising; and to develop processes to support and enhance the leadership team's unique strengths and the organizational culture. I proposed three, 2-3-hour sessions.

4. **Create a functional matrix to document the existing processes and resources to help BPL reflect on its assets and identify areas of need.** The purpose of the functional matrix was to make current resources and processes explicit in an effort to

begin thinking about what types of responsibilities would need to be covered in relation to fundraising and to review the budget as it related to funding priorities. The proposed outcome was to "test" the idea of a system using existing capacity to see what roles/responsibilities, if any, needed to be considered beyond the current capacity. Data was to be gathered from multiple sources, including meetings with the co-executive director and chief program and strategy officer, staff conversations, data from donor management operations meetings, research, and field expert and stakeholder interviews.

The successful result of these four tactics would be the development of an IDS and documented data that could be used to (1) identify a cadence for the fundraising cycle; (2) consider new funding streams (legacy gifts, events, government contracts, state line items, matches, etc.); (3) help the leadership recognize changes in the landscape that could impact goals, such as new tax laws (e.g., itemization of taxes could have an impact on giving); (4) develop resources to assist fundraising efforts (marketing materials, leave behinds, updated online profiles); and (5) review the role of each funding source and what they expect in return; for example, corporations-visibility; foundations-outcomes and impact; individuals-recognition and return on investment.

<u>EVIDENCE</u>

The project resulted in three major deliverables:

1. Documented reflections from staff and stakeholder interviews and organization leadership (resident, co-executive directors, and the chief program and strategy officer)

Interviews with field experts, funders, staff, board, and leadership

Taking time to learn from key stakeholders and staff about BPL's history, culture, and challenges proved critical to the project's emerging goals. Our conversations also provided an opportunity to hear multiple viewpoints on perceived challenges to fundraising with individual donors and to test my thinking about a theory of action that the organization would embrace.

If I were to be able help the organization feel more comfortable with donor cultivation, some of the project goals would depend heavily on trust. Moreover, to gain trust in and understanding of the processes in place for donor management, I would have to share my own experiences, both good and bad. This transparency made my early conversations with individual staff members about my project as valuable to my own learning as they were in forming a foundation of trust between myself and the staff leading the executive, programmatic, and operational functions of the organization.

My conversations with staff and stakeholders created a level of mutual agreement that I felt was necessary to formalize and jumpstart individual donor efforts. Some staff who had connections to potential donors told me they wanted to understand the donor management process before sharing. Others were curious about the fundraising goal and the

subsequent strategy. Funders and board members were curious about how the organization planned not only to develop a pipeline of donors but to build and sustain the systems needed to support those efforts. I sensed that everyone wanted to contribute in some meaningful way, but they were wary of putting their personal and professional credibility with their networks on the line. Without a clear understanding of what cultivating a relationship with an individual donor on behalf of BPL would entail or whether they would be implicated in the follow through, staff and stakeholders were hesitant about what role they were expected to play. Increasing the number of individual donors and the amount of unrestricted funds was not an issue unique to BPL. Most organizations struggle in this area, which was confirmed by my research and my own experience. I had been on both sides of this conversation with staff a number of times over the course of my career.

Individual Donor Strategy Sessions

The goal of the IDS work sessions was to reflect on three main questions: What makes this goal personal? Where does it hit us in our identity/beliefs/experience about wealth and privilege? What parts of the process do we find most challenging or most comfortable both as individuals and as an organization?

I facilitated three 2-hour virtual meetings from February through April. Each meeting began with a "connection question" to ground participants in the purpose of the project and in our personal connection to the project goals. We worked together in a variety of ways, including documenting our thoughts in a shared Google doc, facilitated conversations, and a review of the outcome of the project tactics. During the last IDS session, we expressed our thoughts on Dr. Susan Kenny Stevens' organization lifecycle

theory, and I took some time to share my implications for site with the team. These sessions were the most powerful and impactful part of my work with the team. Our fears and assumptions lie at the heart of any change, and these are largely based on our own identity and experience. By exploring some key questions, we were able to identify and share both real concerns and real wins about our fundraising experiences. In one session, we all realized that we didn't like the idea of having to "pitch." This feeling was backed up by industry professionals in an article featured in the *Chronicle of Philanthropy* titled, "A Major Gift Ask Is About Much More Than Just the Dollars." Ronald Schiller, author of *Belief and Confidence* and a founding partner of the Aspen Leadership Group and the Philanthropy Career Network, states that, "for a nonprofit's staff members, asking for a gift—particularly in a first meeting—can be awkward and difficult. Much easier and more productive initial questions might include, 'What would you like to accomplish with your philanthropy? What was the most successful gift you've made? What was your most enjoyable gift and why?" (2016, para. 7). Schiller believes that "if you begin with such questions, rather than with a sales pitch about your organization and its exciting plans, you will create a two-way conversation, and you will likely learn a great deal about how to engage each donor's passion and interest" (para. 12). A conversation with one of BPL's current donors confirmed this. He stated that, although he didn't want to be "pitched to," he did want to be asked. He went on to say that he would also be willing to ask for donations on BPL's behalf, which aligns with another point Schiller makes in his article. Schiller's advice for donors who want to understand how to encourage other donors to give is to ask, "Has the organization been a worthy partner in your philanthropy? Has it done what it said it would do? Has it made you proud to be affiliated with it?" If they answer "yes" in each case, then ask:

Do you believe the organization might be a good partner for any of your friends, a

vehicle through which they might have the impact on society they desire? . . . You

don't need to ask them to give, you can tell them that you've had a positive

experience and ask them whether the organization might similarly offer them a

positive experience. (para. 10)

This meeting resulted in the identification of a best practice that BPL leadership seemed to

understand intrinsically, further affirming for me that the relational aspect of BPL's culture

would be one of its greatest assets in cultivating donors.

Reflection is a major part of BPL's work with practitioners and students. It is an

element that seemed to resonate with the staff, and they understood that it is a valuable

practice. During a leadership retreat, I was able to put this theory to a test by facilitating a

staff session about reflecting on the rituals, routines, and resources we employ in everyday

experiences. The co-executive directors and founders participated, which helped to

legitimize the process. The session, which I developed in cooperation with the business

systems manager and the chief program and strategy officer, drew from past staff

conversations about communication and brought staff together to reflect on how they know

what they know, do what they do, and communicate that information to others. Using

common language and everyday experiences this workshop served as both a professional

development opportunity and a way for a virtual staff to connect and share parts of their

personal life with their work "family." By sharing something as seemingly mundane as how

we each brush our teeth, we could think about what makes a superficially universal practice

unique to us and how easily we can assume that everyone else defines, describes, or tackles a

challenge in the same way. It also helped us consider what we want our collective ritual to be and how we will communicate it to others. Our combined work on the initial presentation helped to establish a sense of shared investment in the outcome. Because I spent the first part of my residency trying to be sure I understood the organization's culture and values, it was important that the staff and leadership could see themselves reflected in my session. I felt a sense of accomplishment when I heard from one of the cofounders and other longstanding influencers in the organization that it was a good presentation. In the end, the session helped to establish my credibility with the BPL staff members I did not work with on a regular basis.

2. A matrix template for documenting important considerations that will influence the IDS functions for ongoing use by the organization.

Documenting findings to check for missing data and identify blind spots

After identifying the necessary donor management functions that already existed within the organization, I needed to understand what each function should do, why, and how. As I collected data via research, interviews, meetings, etc., I began to build a matrix based on an "ideal" donor management system for BPL, one that would direct all functions and processes toward a successful outcome. Each potential function was outlined in the first column of the matrix, and the why, how, who, when, and what questions were listed horizontally. The final column was left open for unanswered questions. The goal was to build a discreet process for each function that would be tested and have a documented workflow.

I used the matrix to inform my thinking in four areas:

- Staffing

- Existing organizational capacity

- Resources needed

- A blueprint for the build out of the initial workflows

The initial version of the matrix was shared during the first IDS. The session was too short to thoroughly review the data, and I quickly realized that I could have sent the matrix to the leadership team in advance to introduce them to the contents. I also realized that the matrix was designed for my use and therefore might not be the clearest way to present this information to other members of the team. During the second IDS meeting, I reintroduced the matrix as a template or an example of a tool I was using to facilitate my thinking in one encapsulated source. This description seemed to resonate, and when I asked if something like the matrix would be of value and how, it generated discussion on the ways leadership could find it useful. One suggestion was as a blueprint for future workflows, another was as a training tool for someone documenting information to build on later. I also asked whether there were other ways to organize the information that might be of value to the leadership team.

The functional matrix surfaced gaps in my own knowledge and understanding of what resources and processes existed in the organization and generated conversation among team members. This was the intention of the tool, and I was thrilled to see that, in the words of Co-Executive Director Andrew Frishman, there were functions that "were nascent and others that seemed to be emergent." The matrix also surfaced where we needed more information to help us decide whether to prioritize the development of a process.

The matrix also provided a way to illuminate the need for people power versus technology. This was an important lesson for me to share with leadership. The technological resources we currently held were of value only to the extent that someone could conduct initial research and enter data. This shifted our thinking about what to prioritize and how to assign roles and responsibilities.

I created a shared Google Drive to use in virtual working sessions with the co-executive directors and chief strategy officer. The drive helped us keep track of and make explicit any data collected that was related to the project. I also used the drive to make changes in the setup of the system and subsequent workflows in real time. The leadership team used it to add feedback and insights during and between meetings. The Google Drive proved to be a useful resource for a team accustomed to working virtually. It was also beneficial for documenting and reviewing outstanding items during one-on-one meetings with members of BPL's leadership team. Because BPL uses a Google-based platform as an "intranet," it was a good way to build on existing practices.

I created a document to track and share new and emerging terms from my research. This was to keep track of my own learning and to ensure that I was explicit about the terminology I was using.

Term	Definition for this project
Lead	A contact in Salesforce speak that may turn into a prospect
Prospective Donor	Individual we are cultivating for a monetary gift

Donor	A person who has donated a monetary gift to BPL
ID	Individual Donor
FD	Fund Development
Touchpoint	A point of contact or interaction with the Lead, Prospect, or Donor
Moves management	**Moves management** refers to the process by which a prospective donor is moved from cultivation to solicitation. "**Moves**" are the actions an organization takes to bring in donors, establish relationships, and renew contributions. For our purposes, we are focusing on the last part of this definition

Clarifying the language I used to describe my work on the project became a challenge. I was using terms like "system" interchangeably with "processes" and "functions." This was confusing to those I was with, and at times I even confused myself when I was asked to clarify. I realized that the nomenclature inherent to project management and fundraising were two languages I would need to master before I introduced elements of the project to the staff. This was a learning curve I hadn't anticipated. Thankfully, BPL had a wonderful and patient staff who were very familiar with the terms used in project management. The business systems manager, who documents business processes for the organization, offered expertise in project management that was invaluable in helping me consider ways that I could document the multiple processes that would eventually make up the individual donor management system. She and the chief program and strategy officer also worked with me to norm on language that would be universally recognized by BPL staff. They were working together to document workflows in other functional areas of the organization and encouraged me to adopt the language being used in that process. They had also started to create a template for documenting these workflows, and we agreed that,

because this was a new practice at BPL, we should try as much as possible to make the documentation of any workflows as uniform as possible.
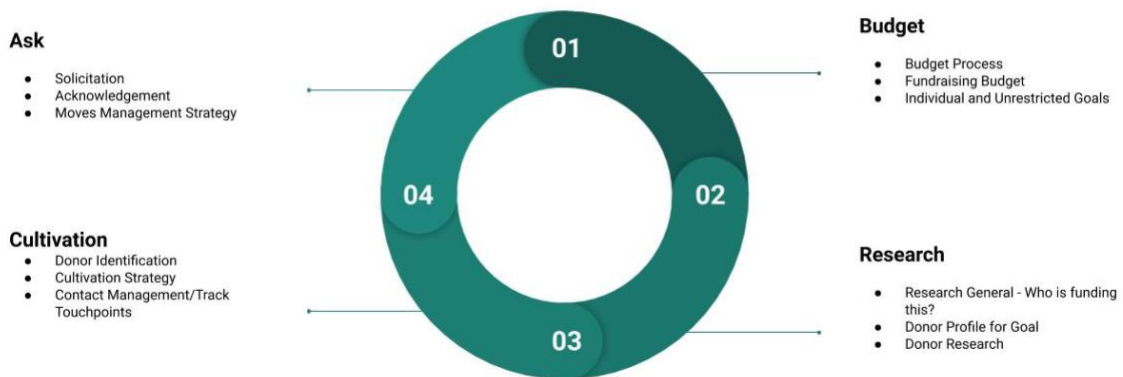
3. A recommended IDS made up of multiple functions with prioritized documented workflows.

What is a donor management system anyway?

My research on donor management systems began with content expert interviews, reviews of best practice on professional fundraising association websites and publications, and a review of BPL's current practices. I learned that a strong donor management system is actually a collection of interconnected **functions**, each with its own **process**. Each function has a unique purpose yet needs to be integrated into a larger **system** in order to move the fund development goal forward (and keep donors progressing through the pipeline).

Each function plays a critical role in the donor management system, and though they build on one another, each donor experience will be unique, and each strategy will have its own context. Although the ideal process would be to follow a flow, the order of that flow will differ from one donor experience to another. The more important aspect of the system is to ensure that all the functions are covered, and to do this I needed to know why each function was important. Based on my research, I identified four recommended functional areas a system should cover: budget, research, cultivation, and ask. Each functional area has 2-3 functions that work together to make the system. The recommended functions I propose for BPL are as follows:

Revised IDMS

Ask
- Solicitation
- Acknowledgement
- Moves Management Strategy

Cultivation
- Donor Identification
- Cultivation Strategy
- Contact Management/Track Touchpoints

Budget
- Budget Process
- Fundraising Budget
- Individual and Unrestricted Goals

Research
- Research General - Who is funding this?
- Donor Profile for Goal
- Donor Research

Budget

- **Document the Organization's Annual Budget Process**. Include timeframes and any staff preparation needed to contribute. What are we trying to fund and how much will it cost?

- **Fundraising Budget.** Identify the portion of the budget to be covered by fundraising versus contracts or other revenue sources.

- **Unrestricted Goals from Fundraising Budget**. How much do we anticipate/project could come from individual donors vs. other unrestricted means?

Research

- **Conduct General Research.** Google searches and conversations with current donors, board members, peers, industry experts, people at networking activities (conferences, etc.), and a survey of philanthropic publications to determine who is funding this work, in what circles it is considered a "hot topic," and what "category" this need falls under. Is it progressive reform, alternative education, education technology, workforce development?

- **What Is the Donor Profile** of those who are funding what we have identified as a goal? Do we know any individual or an individual connected to a foundation who fits that description?
- **Review WealthEngine Research** on potential donors and prepare documentation for prospect meetings and entry into Salesforce.

Cultivation

- **Donor Identification** will be part emergent (Do we have an in? Who should take the lead based on what we know?) and part operational (use of profiles generated in WealthEngine and data from other sources).
- **Cultivation Strategy w**ill be part process (set up a time to talk, have materials ready, etc.) and part opportunistic and emergent.
- **Contact Management/Track Touchpoints** in Salesforce.

Ask

- **Solicitation**, or when, how, and amount of ask.
- **Acknowledgement** will be part operational process (send thank you, feature in publications or on website, etc.) and part opportunistic and emergent (public acknowledgment, perhaps at one of our events).
- **Moves Management Strategy** should be part of a regular meeting (an agenda item at prospect meetings, sometimes elevated to the board development committee meetings), and also should include a process for regular touchpoints (monthly donor update emails or calendar reminders to say happy birthday, retirement, coffee chats when in town, etc.).

Establishing a Prototype of the IDS

Building the donor database proved to be a challenge. The system we had access to could search individuals we already had identified and entered, but it could not perform a query based on geography, characteristics, or demographics without the purchase of upgrades. This meant we would need to build our donor database from the existing data BPL had on previous donors and contacts that were part of the current network. We had the option to purchase lists of potential donors to upload onto the platform, but this was a significant gamble relative to the number of prospective donors that might become viable options, and we determined that running large numbers of unvetted contacts through the platform was not a feasible option, given that the pricing was based on a set number of searches and the option did not guarantee the results.

I assumed this was an issue faced by many nonprofit organizations, so I contacted a well-respected colleague who is vice president of giving at a large national nonprofit. She confirmed my suspicion that we would need to build a donor database from scratch and offered the encouragement that it was actually more fruitful to begin with known entities. A second conversation with two former colleagues who are currently serving as nonprofit CEOs confirmed this. My colleagues noted that starting with known entities would allow us to begin thinking about "moves management," a term that describes the process of working with a donor to increase their gifts and/or frequency of giving over time. The challenge this posed to the fledgling BPL individual donor management system was that it would require more time than I felt the organization's leaders could spare, even with a partially digitized process. It was something I could do while serving my residency but would need to be tended to by someone else when my residency ended. This was further evidence that a

culture of philanthropy could be what BPL needed to increase efficiency. Spreading some of the functions and processes associated with fundraising across the organization could reduce the amount of time the co-executive directors would need to spend on some of these necessary but time-consuming tasks.

Donor Management System Meetings

The director of technology was exploring the use of Salesforce in other areas of the organization and, through a conversation with the co-executive director, recognized that we could integrate our donor research application (WealthEngine) with Salesforce to run searches quickly and hold data in one application. The director of technology recommended that we begin meeting to flesh out the details. He invited the chief communications officer and the business systems manager to join the conversation.

We are currently previewing and testing the design of a donor contact database in Salesforce by integrating donor information from previous years into one common location. Use of the Salesforce platform for donor management looks promising and should prove to be a resource the organization can put to use immediately. To prepare for this, I had a few conversations with staff members about existing sources of donor data we could upload into the system. This data was largely based on donations that had come in via the website or snail mail in previous years.

WealthEngine is now aligned with Salesforce to hasten the process of researching potential donors and documenting touchpoints. Grants and contracts have documented workflows and, as a result of my residency, workflows are being designed and documented

for the functions associated with an individual donor management system. It appeared to be the right time to begin a discussion about organization lifecycle theory. Based on the evidence above, I could see that organization leadership was beginning to embrace the idea of experimenting with some systems and structures. In addition to helping me to understand how BPL's stage of organizational maturity might be impacting their fundraising capacity, I also hoped organizational lifecycle theory could serve as a valuable resource for helping me to explain the vital role that developing goals, creating workflows, and identifying resources could play in supporting the organization's fundraising goals.

ANALYSIS

To better understand the context within which the organization was functioning, I started with conversations with the leadership, then with staff and stakeholders. Being in the mix and working with staff was the best way to learn what was important to BPL and to establish credibility. I learned that people love the organization and want to be able to trust and understand where the organization is going. They wanted clear goals and to be able to trust that the fundraising process would bear fruit. I wanted to help the leadership see that transparency and systems could help to make things explicit and allow staff to see themselves in the process. Therefore, I needed to start with something tangible to demonstrate that something was happening, I needed staff to believe that there was movement toward the goal. So, I began with the operations for the staff and then moved into changing beliefs for the leadership.

Thus, began the biggest challenge of the project. I was simultaneously walking down two very distinct paths that would need to converge: one was changing hearts and minds, and the other was readying the operations to support an individual donor pipeline. I kept in mind BPL's concerns about staying emergent and not getting bogged down in systems, and I tried to think about what resources could help leadership make decisions quickly by having access to all the available information. I reflected on what data would be needed and what format would be most useful for the leadership team. I also was hopeful that we could create "dashboards" or other reports as a way to track and monitor movement within the donor pipeline, which would provide an easy way to measure and share progress toward our fundraising goals. I wanted to provide BPL with a robust system that could mitigate the need for people power, thereby giving the co-executive directors the time to do what was most

important, donor cultivation. However, I quickly realized there were functions that needed to feed into this system and functions this system would need to feed. This placed the donor management system squarely in the center of other organization functions under review, like the budgeting, strategic planning, and business management processes.

My initial approach to the project was very technical. My conversations with staff revealed that they wanted to know the fundraising goal and understand the process. They wanted to feel comfortable sharing information about potential donors and knowing how they would be vetted and followed up with. They also wanted to understand what it meant to work with donors. There was some concern about the level of comfort, lack of experience, and whether they would be expected to ask for money. I thought that if I could help the leadership demystify the process and demonstrate that there was a system in place with clear steps, it would help to instill a sense of trust.

In January, I began to realize that my conversations with the staff had been instrumental in informing my understanding of the organization, and that their concerns about the fundraising process were heavily informing my thinking about the project. As a result, I emphasized understanding and rolling out the technical aspects of the project while trying to grasp the functions. The chief program and strategy officer had been prodding me to schedule the IDS meetings and begin my work with the leadership team. During a meeting with her, she asked me why I was so focused on the operational functions of the system. At the time I didn't have an answer, but reflecting back I can see that this project was similar to some of my previous experiences launching fundraising efforts with staff, in that it had surfaced similar types of concerns.

In past efforts, I often spent the bulk of my time trying to help the staff embrace a fundraising strategy they did not necessarily understand or feel connected to. Staff working directly with communities often didn't see themselves as part of the fundraising team and were concerned about parading youth and community members in front of wealthy donors or grant-makers in an effort to make them "feel better about their giving." I knew firsthand that the disconnect between programmatic and mission-focused work and the executive functions of marketing, finance, and fundraising could and often did breed an "us vs. them" mentality in organizations, and the result was a fundraising team that could never quite speak authentically about their organization's programs or mission in practice. Alternately, the programmatic staff didn't trust the motives of the executive functions of the organization and didn't want them to be part of their work with communities, even though the fundraising, marketing, and finance functions were critical to their work. As a leader, I often was required to "translate" for both sides while navigating my own feelings about being a woman of color from a marginalized community. I had my own concerns and feelings about the thin line between community exploitation and the need to cultivate donors, and these experiences weighed heavily on me. I can see now that I wanted to provide the staff with something tangible to quell their concerns, something they could "see."

This project differed from my previous experiences in that both the leadership and staff at BPL had bought into the idea of increasing the number of individual donors, they just hadn't yet communicated their thoughts to one another about what that could, should, or would look like. Although there appeared to be some skepticism among the staff, it was largely about what goal and strategies would get the organization there. There also was some

concern about whether BPL had the resources to support its fundraising efforts. These could be viewed as the more technical aspects of the project. The problem was clear: the organization lacked a donor system, but the expertise and best practices associated with good donor management and cultivation existed and was documented. Finding the right resources and identifying the best practices to employ at BPL was a matter of research and resources. And, because the values and culture at BPL attract a certain type of individual, the staff had strong adaptive skills and was willing to work for a leader and a cause they believed in. They were willing to muddle through and work with some level of ambiguity, knowing that learning was a part of their collective process. Unlike many other organizations I worked with, this one had a staff that had bought in, and I assumed they just needed transparent goals and documented workflows to help them orient towards the bigger picture.

A conversation with my academic advisor helped me understand that I had assumed the technical work on this project would be technical, whereas at BPL the project in fact was surfacing challenges to beliefs, mindsets, and culture that had to be addressed before I would be able to support the technical approaches. Based on my previous experience, I had underestimated what the project would entail.

Though there was evidence to suggest that the leadership had been taking incremental steps toward systematizing other areas of the organization, I didn't sense that they were convinced systems would actually support the emergent nature of the organization's work without adversely impacting the culture. My hope was that they would recognize that, if we identified the strengths and resources inherent to BPL and designed workflows in tandem, we could increase the organization's capacity to vet and follow up on

leads in less time. This would improve the odds of making meaningful connections with the

right prospects, eventually increasing the number of long-term relationships and resulting in

larger gifts.

I also wanted the BPL leadership to reflect on the organization's challenges in

relation to their peers. They were carrying a heavy weight (as most nonprofit leaders do), and

I thought it might help if they could see that other organizations struggle with similar issues.

To accomplish this, I looked for a resource that would provide an objective lens through

which to view the organization's functions. I wanted something with a fluid approach, that

could be utilized as a guide, tool, and support, that also used language and a rationale that

was reflective of and accessible to practitioners. After a review of several organization

lifecycle theorists, I chose Dr. Susan Kenny Stevens' book *Nonprofit Lifecycles: Stage-Based*

Wisdom for Nonprofit Capacity. She identifies five benefits to using her stage-based model, one

of which is that "it depersonalizes organizational management weaknesses and reframes

current stage-related growing pains as predictable for that developmental stage" (Stevens,

2002, p. 19). I needed this reframing to help me work with BPL's leadership team to map

out the remaining parts of the project.

BPL seemed to be building on the success of its founding ideas and philosophies and

considering how to define themselves moving forward. Stevens writes that

> in the growth stage nonprofits become more deeply aware of what makes them who
>
> they are, they begin to further refine service in such a way that organizationally, they
>
> become less dependent on individuals and more method oriented. Thus, a distinctive
>
> style which might have been developed by or associated with an individual staff

person gives way to an "approach" or a "methodology" that is now transformed into

an organization hallmark or "brand." (p. 32)

This definition of growth does not refer to scale; rather, it is a way to describe the process of

an organization's maturity or "growing up." Organizational maturity goes beyond the type of

growth that would scale what BPL does; it is about expanding the understanding of why they

do it and evangelizing that it can be done. The development of ImBlaze, for example, made

the idea of allowing students to leave a building to learn more feasible. It was proof that, if a

school system was invested in this design, it was possible to make it work. The updated

website is another example of the organization growing up. The description of what BPL is

now includes the term "activists," with a call to action to change the system. When Co-

Executive Director Carlos Moreno gives a keynote speech, he often ends not with a pitch to

adopt a contract with the organization but with a call to action. While this was always

embedded in the BPL design, its influencing element has become more prominent. This can

only be accomplished because BPL has amassed credibility and a following through an

established track record of success and proof points.

Given this reality and the need to keep costs to a minimum, I knew it would be a

challenge for the organization to embrace some of my recommendations at full throttle;

however, there were many recommendations they could adapt for use within their current

state. I had heard the co-executive director refer to the theory of "muddling through"

developed by Charles E. Lindblom in the 1950s and knew the concept referred to

incremental changes based on new and emerging data from new and emerging experiences.

This prompted me to consider that the best way for BPL to learn what it means to become

systemized might be by "rightsizing" the IDS so we could roll out new elements as needed.

We could base the design on current needs and available resources with an eye toward increasing capacity as the need arose. "Let's not buy the Electrolux when what we need is a broom and dustpan" became my mantra. I made it a point to understand what each function of an IDS absolutely needed to cover. I realized that spending the time to get to know and understand the culture of the organization allowed me to design my recommendations based on current practices and resources, which would make them not only recognizable but adjustable as the organization's capacity grew. When it came to operations and technology, I started with what the organization already had in place and could use. The functional matrix enabled me to think about repurposing existing resources and skill sets.

I was fortunate that the BPL leaders were in the process of looking at other organizational functions and experimenting with the development and documentation of workflows. They were evaluating what systematizing could look like across the BPL organization, which enabled me to introduce some new ideas about how to talk about and introduce the role of systems at BPL. For example, in our second IDS session, I introduced a definition I had come across in a publication titled, "How Culture Change Really Happens," which was written for the NeuroLeadership Institute by Heidi Grant and her colleagues Mary Slaughter and David Rock. They described systems as "the structural implementations that reinforce a desired behavior. They do so by removing obstacles to adopting the new habit, enabling it to become the norm by making it easy and accessible" (2018, p. 7). These types of alternate views on systems as liberators rather than constraints helped me make the case that BPL did not have to give up its identity to embrace supports that would ultimately help make their goals, strategies, and workflows more explicit and transparent for the staff.

In reflecting on my initial concerns about the project, I expected to some extent that the staff, leadership, board, and stakeholders would have differing perspectives on what a strategy for identifying, cultivating, and managing donors could look like. I also expected that my conversations would surface some concerns about fundraising with individual donors, but I believed it would actually benefit us all to recognize each of us brings our own beliefs about that process to the table. I was fairly certain the project would surface a lack of resources or gaps in practice that would take me longer to document and/or mitigate than expected, as it did. Some of the technical challenges I didn't anticipate were that (1) I needed to understand the processes of each of the identified functions, from the inception of the budget to when and how we accounted for the check after the donation was made, and (2) I had a sharp learning curve in terms of the applications used for prospect research and what they could and could not provide without expensive additional add-ons and manpower. Both of these challenges initially took up much of my time, and as a result, I took too long to bring the leadership team together to facilitate conversations about the more adaptive elements of the project. While I don't feel this had an impact on the outcome, I wonder if I waited too long out of fear that, if I did not have all the answers, then perhaps the more in-depth and time-consuming parts of the project—the parts that required changed attitudes and beliefs about systems or fundraising—would be shelved in favor of the more technical deliverables.

Whenever possible I tried to create an experience that would cause the leadership team to stop, look, and ponder what they thought to be true. As a result, I intentionally tried to structure every deliverable to be used as a tool for communication and reflection, both

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immediately and in the long term. Whether it was documenting practices in the matrix, mapping processes for the functions, or even documenting reflections from our working sessions in real time in a shared drive, I hoped that having something documented in one place would make the process of reviewing and reflecting on bigger projects quick and painless. Knowing how strapped most leaders are for time, I felt that this was a gift from one leader to another that I could leave behind.

My lack of experience in a virtual environment complicated this approach to the project in two ways: First, I was initially at a loss for how to facilitate reflective practices in a virtual setting. And second, I needed to ensure that, in this new virtual experience, I was not isolating my thinking to my perception alone. The ability to see people regularly face to face, was something that I had taken for granted in a traditional work environment. I didn't realize how often I relied on quick impromptu "check-ins" with my supervisors, colleagues, and staff as a way to process my thoughts and gauge my perceptions. I also recognized that as an intuitive feeler I was accustomed to taking in data by observing and spending time with others. I now had to be much more intentional about how and when I solicited thought partnership in this new way of work.