

# TRENDS AND FORCES RESHAPING NONPROFIT ORGANIZATIONS

*Actions and Strategic  
Questions for  
Nonprofit Leaders*



The Philanthropist

Ignite<sup>NPS</sup>  
Turning Insights into Action

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Ignite NPS is a foundation that supports the development and broad distribution of practical research, resources and tools designed for board members and staff of non-profit organizations across the sector. The goal is to ignite leaders to adapt creatively and effectively during a time of complexity.

## About The Philanthropist

The Philanthropist ([thephilanthropist.ca](http://thephilanthropist.ca)) is a free online journal for practitioners, academics, supporters and others engaged in the non-profit sector in Canada. It publishes articles and useful information about the sector's important contributions to our communities, our country, and our world and aims to spark and facilitate debate among readers. Founded in 1972, The Philanthropist was issued quarterly until 2009, when it moved to an online format. It is published by the Agora Foundation

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## Introduction

During the last decade non-profit leaders often asked: Where do we find the money? In today's environment of complexity and accelerated change, the better question is: How can we adapt our organization to better accomplish our mission and thrive in this environment? This resource is designed to help nonprofit leaders – boards of directors, senior volunteers and management – explore this question.

Mega trends are converging to reshape nonprofit organizations:<sup>1</sup>

- Technology advancements are generating more and better data and connectivity.
- Economic shifts are creating intensified competition for resources at a time of increased demand.
- Generational differences and the changing face of communities are shifting attitudes about work, volunteering and philanthropy.

The resource describes how these trends affect the way in which Canadian non-profit organizations are governed, managed, resourced and organized to accomplish their work. The shifts are captured in four strategically important themes:

### THE FOUR THEMES EXPLORED IN THIS RESOURCE



Within each theme, the resource presents action ideas to consider, strategic questions to kick-start generative conversations and lists of resources that help leaders better understand the challenges they face.

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**Reshaping Nonprofit Organizations** challenges six often held assumptions:

- Overhead must be low.
  - An organization must be relentless in distinguishing itself in the marketplace.
  - Charitable organizations are the go-to place to do good.
  - There is chaos without hierarchy.
  - The role of volunteers is to support staff.
  - Long-term growth is one of the most important goals for an organization
- 

Nonprofit leaders can use this resource in several different ways:

- Read it as a high level briefing on the current environment and ways in which organizations are adapting.
- Use the action ideas to stimulate discussions and respond to the trends.
- Draw from the menu of strategic questions at the end of each section and select those that resonate. Then address them as part of a strategic planning process, board and/or management 'big picture' session or risk management exercise.

Each organization has its own unique context that frames its response to the strategic questions and course of action. For some organizations, these trends and forces are already integrated into the fabric of their organization. The resource provides an opportunity for them to reflect upon and celebrate achievements. For others, the process can lead to more profound changes that can help them to adapt and thrive.



# 1. MISSION EFFECTIVENESS

- Measure what matters
- Position overhead as mission critical
- Enable innovation
- Explore mergers and amalgamations

Expectations of funders and donors for rigorous accountability and demonstrable results aren't new to non-profit organizations. However, in the next decade funders and donors will increasingly require evidence of mission effectiveness. Support will continue to migrate to those organizations that demonstrate meaningful and sustainable impacts, in the most effective way possible, and for the benefit not only of the individuals or causes they serve but also for the system as a whole.<sup>2</sup>

## Measure what matters

In this intensely complex and competitive environment, organizations are asking more demanding questions about their own relevancy and putting those questions at the heart of strategic conversations. In KCI's Philanthropic Trends Quarterly, Jan Belanger, vice president, community relations for Great-West Life, London Life and Canada Life says that organizations need the 'courage to challenge past successes and institutional history, and put everything on the table to see if it's doing as well as it could'. Without these conversations, Belanger feels that some organizations "may be self-directing their own demise".<sup>3</sup>

The explosion of new technology and the exponential increase in the volume and accessibility of data has made it easier to generate robust information. This information can be used to create a more accurate picture of results, rapidly diffuse promising practices, and align measurement and feedback systems. It also raises issues about how organizations use digital resources ethically, safely and effectively.

Organizations are increasingly expected to be highly disciplined in how they collect, analyze, use and protect the performance and evaluation information they generate. Even less resourced organizations must collect convincing qualitative and quantitative information about their performance and program impacts. The complex nature of many issues can make it difficult to attribute cause and effect or even to reach agreement on the



## 1. MISSION EFFECTIVENESS

metrics to measure. One of the challenges is that many organizations are pulled sides ways, measuring what matters to funders and donors rather than what matters strategically to their organization. Another is that organizational leaders are tempted to focus on low hanging outcomes rather than on the outcomes that are critical to achieve substantive social change.

### Action Ideas

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- *Ask tough questions that involve a choice e.g. given we cannot do it all, what should we not do or stop doing.*
  - *When determining what to measure, think beyond the organization as a service provider to what the organization is solving.*
  - *Closely align technology and data strategies with the organization's larger strategic priorities.*
  - *Clarify the reasons for doing evaluations. Is it to meet accountability requirements? For deeper reflection? For learning and action? If there is more than one reason for doing evaluations, how do they align, who will use the findings and for what purposes?*
  - *Use a Theory of Change to decide what to measure; put the people served at the centre of all impact measurement.*
  - *Value rigorous evaluation. Also value informal ways to track progress such as documenting qualitative stories and using indicators that may not be scientific but seem reasonable and credible.*
  - *Collaborate with other organizations to share the costs and to coordinate large-scale evaluation, build data analysis capacity and/or to identify key metrics.*
- 

### Position overhead as mission critical

Funders and donors often use low overhead as a proxy for organizational effectiveness.<sup>4</sup> This has led to a myth that overhead is disconnected from program delivery, as exemplified by the common refrain that dollars must be used to support the cause, not overhead. While overhead will continue to be an important dashboard metric, it must also be seen as contributing to outcomes and being more than a wedge in a pie-chart.

There is a growing awareness that underinvestment in overhead is unproductive.<sup>5</sup> Investments in people, processes, technology and other infrastructure not only improve efficiency, they are essential for achieving meaningful and sustainable impacts. As Lester



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Salamon points out, “belt tightening has its limits and at some point starts to damage vital organs”.<sup>6</sup> The Ontario Nonprofit Network (ONN), Imagine Canada and others are encouraging nonprofit leaders to champion impact rather than defend overheads.

### Action Ideas:

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- *Make the case to donors and funders that there is a direct relationship between funding for overhead (people; administration; processes such as IT, HR, evaluation; and infrastructure) and service quality and outcomes.*
  - *Consider allocating appropriate overhead costs to mission (programs, research, etc.) for financial statement presentation rather than to a cost centre called administration or overhead. (see A Graphic Repositioning of Nonprofit Overhead).*
- 

## Enable innovation

Organizations are recognizing the need to adopt innovative approaches to achieve meaningful and sustainable impacts on complex issues. Allyson Hewitt, a senior fellow, J.W. McConnell Family Foundation, and director at SiG@MaRs, believes that without innovation, we are “destined to continue to achieve sub-optimal impact as we continue to play it safe”.<sup>7</sup> While there is a great distance to go, some funders are providing longer term, adaptive funding required for innovation. More organizations are also finding ways to overcome their risk aversion in order to experiment, fail and learn – all cornerstones of innovation.

Innovation also applies to sources of revenue. Impact investing and social enterprises are becoming more common vehicles for generating financial as well as social, cultural and/or environmental returns. There is renewed interest in generating earned income, which has always been a significant source of discretionary funds for nonprofit organizations. These trends, while positive, divide the sector into two groups: organizations that can take advantage of these sources of funds and those organizations that should not or cannot. Not every nonprofit organization is equipped to run a successful social enterprise and impact investing has limited potential for most charitable organizations.

### Action Ideas:

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- *Create a dedicated budget for innovation.*
- *Identify what is helping or hindering innovation within the organization e.g. determine whether staff members feel they can experiment and whether false assumptions block development of new approaches.*



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- *Spotlight significant innovations that occur within the organization e.g. the program coordinator who reduced waiting lists by redesigning the client intake system.*
  - *Work with sector associations and funders to improve funding models and rules so they enable, rather than inhibit, innovation.*
  - *Before looking for sophisticated and innovative financing alternatives, ensure that current strategies (e.g. for donor retention) are maximizing their potential.*
  - *Learn about alternative funding models such as impact investing and social enterprise and understand the competencies required to make them successful.*
- 

### Explore mergers and amalgamations

The search for better and longer term impacts is fueling an increased interest in mergers and amalgamations as a way to improve effectiveness through greater efficiency, increased scale and better quality. At the same time, a growing body of literature is revealing the complexity and significant challenges that mergers and amalgamations present.

#### Action Ideas:

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- *Before considering a merger or acquisition, assess other options that may be less complex and intrusive such as an integration, hub, shared platform or collaboration. (See page 19 for information on collaborations.)*
  - *Understand that a merger or amalgamation will only be successful if it is done for the right strategic reasons, under the appropriate conditions, and with a clear appreciation of risks and resource requirements.*
-



### Strategic questions

1. Is there a direct link between the learning from our evaluation and the strengthened performance, quality and impacts of our programs and services?
2. Are we really prepared to innovate knowing that innovation offers the potential for risks as well as benefits?
3. What competencies are required to secure revenue from impact investments, social enterprises, and other types of entrepreneurial financing? Is the potential net revenue worth the effort and risk?
4. Under what conditions would we explore a merger or acquisition?

### A few good resources:

**A Graphic Re-visioning of NP Overhead:** [nonprofitquarterly.org/2016/08/16/graphic-re-visioning-nonprofit-overhead/?gclid=CKiagIq31tECFZK6wAod\\_84GBg](http://nonprofitquarterly.org/2016/08/16/graphic-re-visioning-nonprofit-overhead/?gclid=CKiagIq31tECFZK6wAod_84GBg)

**Better Evaluation:** <http://betterevaluation.org/>

**CPA Canada, Board Oversight of Not-For-Profit Program Evaluation: Questions for Directors to Ask:** [www.cpacanada.ca/en/business-and-accounting-resources/strategy-risk-and-governance/not-for-profit-governance/publications/board-oversight-of-nfp-program-evaluation](http://www.cpacanada.ca/en/business-and-accounting-resources/strategy-risk-and-governance/not-for-profit-governance/publications/board-oversight-of-nfp-program-evaluation)

**Earned Income Framework:** [www.imaginecanada.ca/sites/default/files/www/en/publicpolicy/earned\\_income\\_framework\\_2013.pdf](http://www.imaginecanada.ca/sites/default/files/www/en/publicpolicy/earned_income_framework_2013.pdf)

**Intentional Innovation:** [monitorinstitute.com/downloads/what-we-think/intentional-innovation/Intentional\\_Innovation.pdf](http://monitorinstitute.com/downloads/what-we-think/intentional-innovation/Intentional_Innovation.pdf)

**Leap of Reason: Managing to Outcomes in an Era of Scarcity:** [www.amazon.ca/Leap-Reason-Managing-Outcomes-Scarcity/dp/098349200X](http://www.amazon.ca/Leap-Reason-Managing-Outcomes-Scarcity/dp/098349200X)

**Mergers and Amalgamations in the Canadian Nonprofit and Charitable Sector:** [www.globalphilanthropy.ca/images/uploads/Mergers\\_and\\_Amalgamations\\_in\\_the\\_Canadian\\_NonProfit\\_and\\_Charitable\\_Sector\\_-\\_by\\_Mark\\_Blumberg\\_in\\_The\\_Philanthropist.pdf](http://www.globalphilanthropy.ca/images/uploads/Mergers_and_Amalgamations_in_the_Canadian_NonProfit_and_Charitable_Sector_-_by_Mark_Blumberg_in_The_Philanthropist.pdf)

**ONN: Learning Together: Five Important Discussion Questions:** [theonnn.ca/wp-content/uploads/2016/11/ONN-Evaluation-Discussion-Guide.pdf](http://theonnn.ca/wp-content/uploads/2016/11/ONN-Evaluation-Discussion-Guide.pdf)

**Social Enterprise Canada:** [www.socialenterprisecanada.ca/](http://www.socialenterprisecanada.ca/)



## 1. MISSION EFFECTIVENESS



### One good idea

*Leaders recognize and then clearly communicate that outcomes measurement is not about simply counting things or gathering information. And it is not about satisfying funders. It is an internal effort aimed at figuring out what works and what doesn't, so that the organization can provide the best possible services to its clients.*

Leap of Reason<sup>8</sup>



## 2. LEADERSHIP APPROACHES AND WORKFORCE EXPECTATIONS

- Create decent workplaces
- Support a participatory and flexible work environment
- Build diversity
- Recruit the right leadership competencies

Advancement in technology, changing demographics and intensified competition are shifting workplace values and expectations, leadership models, the ways staff participate and how work gets done in nonprofit organizations. For organizations to succeed in this environment, their leaders are adopting new approaches to attract and retain talent and to manage across, in some cases, five generations and highly diverse cultures.

### Create decent workplaces

Many nonprofit leaders manage in environments of financial instability, underinvestment in capacity, and crushing demands while wondering how to lead and sustain a reasonable lifestyle and provide the same for their staff. At the same time, thought leaders are debunking the myth that employees in the nonprofit sector are willing (and should be expected) to work in this environment in exchange for the opportunity to “do good”.<sup>9</sup> The document ‘Change Work’ points to a paradox within the sector: ‘mission based organizations, which work to create a better life for clients, find they can’t always provide elements of those same outcomes for their own employees.’<sup>10</sup>

Today talented people can find a socially meaningful career outside a traditional nonprofit organization, which intensifies the competition for qualified staff. At the same time, those entering the sector face many challenges. A young participant at the 2016 ONN conference talked about nonprofit employers expecting members of her generation to have a high level of academic credentials but offering only contract work, internships, or volunteer positions. Young people accept these offers hoping they will lead to secure, full-time employment. However, if and when a full-time job is secured, it often involves working long hours in highly complex and under-resourced environments, for few benefits and without a defined career path.



## 2. LEADERSHIP APPROACHES AND WORKFORCE EXPECTATIONS

While there are larger systemic issues, during a series of interviews with young people Imagine Canada found there are also practical human resource issues at the organizational level that cause young professionals to leave the sector. These issues include inadequate HR management, challenging organizational cultures, lack of clarity around job expectations, and limited training and career development.<sup>11</sup>

In recent years, concerns have reached a tipping point and decent-work movements such as Imagine Canada's and ONN's sector-wide change initiatives are gaining traction. At the same time, a growing body of research on the nonprofit labour force is identifying challenges and offering strategic solutions.

### Action Ideas

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- *Explore the question, does our organization put the mission first at the expense of staff e.g. by trying to be all things to all people.*
  - *Adopt the elements of decent work (see Change Work). Consider creating a board-endorsed decent work charter, proactively negotiating with funders to address restrictive practices and establishing mentoring programs. (See: ONN Decent Work – Promising Practices)*
  - *View human resource policies as a must-have not as a nice-to-have. Ensure that HR policies include clear job expectations, formal and continuous feedback mechanisms, and inspiring career paths within or outside the organization. Then ensure the policies are operationalized.*
  - *Rigorously and creatively explore how to make the executive director's and other senior managers' roles and responsibilities more tenable e.g. review job descriptions and workloads, determine whether the right supports are in place for managers to meet expectations and if they are not in place change expectations.*
  - *Look for opportunities to collaborate with other organizations to reduce the cost and improve the quality of the professional development and training you provide for staff.*
- 

### Support a participatory and flexible work environment

In his article "The Participatory Revolution in Nonprofit Management", Gregory Saxton states, "The increasingly participatory environment engendered by rising levels of education, changing value orientations, and the spread of computer technology is now spurring dynamic nonprofits to adapt by becoming more flexible, horizontal, collaborative and transparent".<sup>12</sup>



## 2. LEADERSHIP APPROACHES AND WORKFORCE EXPECTATIONS

The generations that represent the largest portion of today's labour force view technology as being the core of how they interact and do their work. They use social media for constant connectivity and for easy, open access to information that empowers everyone to be a decision-maker. These generations expect their workplaces to provide a high level of engagement and a flow of information up, down and across the organization. Many also want the freedom to work remotely and flexible hours.

### Action Ideas:

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- *Identify when hierarchical decision-making is required and when it is not. Hold a session with your organization's leadership to discuss how to share power while maintaining authority when necessary.*
  - *Use technology that enables faster knowledge exchange between parts of the organization while continuing to value face-to-face interaction.*
  - *Establish a default position that all information is sharable unless it has been flagged as non-sharable.*
  - *Create explicit expectations for results so that productivity is not equated with sitting at a desk in the office. Work with a staff team to create guidelines for flexible working arrangements.*
- 

## Build diversity

In a recent Ontario Nonprofit Network survey, the Mowat Centre found that diversity in nonprofit leadership and 'a strong commitment to diversity and inclusion at the organizational level' is lagging behind intention. This is a serious shortcoming for many reasons including the following:<sup>13</sup>

- Statistics Canada predicts that if current immigration trends continue, by 2036 half of Canada's population will be either immigrants or children of immigrants. (The Globe and Mail, January 26th, 2017).
- A growing body of research has found that highly diverse perspectives help organizations address the complex, fast-paced environment; enrich problem solving and strategic decision-making; and generate innovations.

Mowat points to barriers – such as organizational capacity and size of community – that impede nonprofits' progress toward diversity and inclusion and notes that "Although many organizations in the sector may have a strong ethos around equity and inclusion, this does not necessarily translate into organizational practice". Mowat concludes this should "signal the need for change in a sector that aspires to represent and speak for the community".<sup>14</sup>



## 2. LEADERSHIP APPROACHES AND WORKFORCE EXPECTATIONS

### Action Ideas:

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- *Build a value proposition for diversity based on its strategic benefits, which include feeding innovation and recruiting talent.*
  - *Create intentional recruitment strategies that go beyond a who-knows-whom approach and familiar networks.*
  - *Ensure that organizational culture, processes and practices enable a diversity of perspectives e.g. talk with staff about their views on alternative approaches to leadership, problem solving and decision-making; conduct an internal survey to determine whether staff members feel they can challenge organizational habits.*
- 

### Recruit the right leadership competencies

The board and management need a large repertoire of leadership competencies to navigate the complex, competitive, accountability-driven environments in which they operate. While passion for the cause still goes a long way, it is not enough. In addition to passion, leaders must be fiscally adept, performance-driven and strategic while also being highly adaptive and entrepreneurial. They need to be visionaries, boundary spanners, and technologically savvy. And to manage greater diversity, they need to be proficient at seeking out and then integrating multiple perspectives.

Over the last few decades, expectations around board roles and responsibilities have expanded and become more sophisticated. There has also been a corresponding growth in the availability of educational materials and training to help boards meet these expectations. Nevertheless, many organizations have difficulty recruiting a board with the required range of high-level competencies. This is particularly true for organizations that have an important cause but limited appeal or those in smaller communities with a restricted pool of potential directors. In today's complex environment, this gap between the competencies required on the board and those that are available is an acute issue.

Organizations with only a few staff may need their boards to fulfil core organizational functions like fundraising, advocacy and marketing. However, for larger organizations the best practice is for boards to remain focused on strategic, policy and oversight issues while staff focuses on operations and execution. In other words, best practice is for boards to be nose in, fingers out.

A board that is recruited using the “one of each” approach – one person who knows the law and one who knows finance, someone who represents the younger generation, someone who represents those served, and so on – will be challenged to coalesce into a cohesive and effective board that is capable of integrative thinking. For this reason, nonprofits are



## 2. LEADERSHIP APPROACHES AND WORKFORCE EXPECTATIONS

increasingly abandoning one-of-each recruitment in favour of a recruitment matrix that places personal competencies at the centre.

### Action Ideas:

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- *Develop a succession plan for management because it will save costs down the road and mitigate risk.*
  - *Ensure the board and management see themselves as co-leaders in achieving the mission and as having distinct but complementary functions.*
  - *Draw on the vast array of educational resources for boards and make board training and development a non-discretionary budget expense and an essential use of volunteer time.*
  - *Create a competencies-based board recruitment matrix in which the first screen focuses on personal competencies e.g. ability to think strategically, commitment to genuine engagement; the second screen then focuses on demographic diversity and diversity of thinking, and the third on functional competencies e.g. accounting, marketing, advocacy.*
  - *Map all the governance functions that need to be fulfilled. Then consider how these functions can be accomplished through a variety of structures and processes such as advisory committees or task forces rather than only by the standing members of the board or CEO.*
- 



### Strategic questions

1. What choices can we make, both large and small, to build and sustain the key elements of decent work within our organization?
2. What helps or hinders our ability or willingness to create a more flexible and participatory work environment?
3. What changes to our processes and culture would enable different ways of working and operationalize inclusion?
4. What fundamental changes would make it possible for us to be successful recruiting the board and staff competencies we need?



## 2. LEADERSHIP APPROACHES AND WORKFORCE EXPECTATIONS

### A few good resources:

**A Workforce Strategy for Alberta's Non-Profit and Voluntary Sector:** [work.alberta.ca/documents/workforce-strategy-nonprofit-and-voluntary-sector.pdf](http://work.alberta.ca/documents/workforce-strategy-nonprofit-and-voluntary-sector.pdf)

**Abundance versus Scarcity Thinking:** [www.socialvelocity.net/2015/03/how-scarcity-thinking-holds-nonprofits-back/](http://www.socialvelocity.net/2015/03/how-scarcity-thinking-holds-nonprofits-back/)

**Change Work: Valuing Decent Work in the Not-For-Profit Sector:** MowatNFP, ONN, Toronto Neighbourhood Centres: [mowatcentre.ca/wp-content/uploads/publications/111\\_change\\_work.pdf](http://mowatcentre.ca/wp-content/uploads/publications/111_change_work.pdf)

**Community Foundation of Canada Hr Council: What Have We Learned About Canada's Nonprofit Labour Force Since 2003?** [hrcouncil.ca/docs/What%20Have%20We%20Learned%20-%2010%20years%20of%20research%20FINAL.pdf](http://hrcouncil.ca/docs/What%20Have%20We%20Learned%20-%2010%20years%20of%20research%20FINAL.pdf)

**DiverseCity on Board: Ten Tips** [diversecityonboard.ca/diversecity-counts/ten-tips-to-diversify-nonprofit-boards/](http://diversecityonboard.ca/diversecity-counts/ten-tips-to-diversify-nonprofit-boards/)

**Diversity at Work:** [hrcouncil.ca/hr-toolkit/diversity-recruitment.cfm](http://hrcouncil.ca/hr-toolkit/diversity-recruitment.cfm)

**Doing More with More: Putting Shared Leadership into Practice:** [nonprofitquarterly.org/2014/04/21/doing-more-with-more-putting-shared-leadership-into-practice/](http://nonprofitquarterly.org/2014/04/21/doing-more-with-more-putting-shared-leadership-into-practice/)

**Four Myths About Young People and Non-Profit Work:** [www.imaginecanada.ca/blog/4-myths-about-young-people-and-nonprofit-work](http://www.imaginecanada.ca/blog/4-myths-about-young-people-and-nonprofit-work)

**Ontario Nonprofit Network Decent Work – Promising Practices:** [theonnn.ca/decent-work-promising-practices/](http://theonnn.ca/decent-work-promising-practices/)

**Secrets From Young People on How to Hire for Entry-Level Positions:** [www.imaginecanada.ca/blog/4-myths-about-young-people-and-nonprofit-work](http://www.imaginecanada.ca/blog/4-myths-about-young-people-and-nonprofit-work)

**Shaping the Future Leadership in Ontario Nonprofit Labour Force:** ONN and MowatNFP: [theonnn.ca/wp-content/uploads/2013/12/ONN-Mowat.Shaping-the-Future.-Leadership.Exec-Summary.pdf](http://theonnn.ca/wp-content/uploads/2013/12/ONN-Mowat.Shaping-the-Future.-Leadership.Exec-Summary.pdf)



### One good idea

*Embrace true mentorship. We're not talking about your traditional top-down "wise mentor" imparting wisdom on an "empty vessel mentee" here... We're talking about building a culture of true mentorship – one where knowledge, skills, insights and ideas are shared up, down, across and between individuals, organizations and sectors openly and freely. This means letting go of our outdated notions of power and control. It also means giving new leaders real opportunities to lead. And here's the best thing: creating a true culture of mentorship doesn't have to cost a dime.*

Five Fundamental Shifts for a Shifting Sector<sup>15</sup>



### 3. NETWORKED AND COLLABORATIVE ACTION

- Work across boundaries
- Invest strategically

New technologies and tools make it possible for people to connect, coordinate, share knowledge and generate ideas faster, more easily and at less cost than ever before. These technologies, intensified competition for resources and changing generational expectations have accelerated the pace at which nonprofits are forming collaborations and increased their complexity. Whether they are called networks, coalitions, alliances, or partnerships, collaborations are no longer add-ons to the same old system with the same old silos.<sup>16</sup>

#### Work across boundaries

There is growing acknowledgement that most societal issues cannot be solved by one department, one organization, or one sector working in isolation. As noted by David Rentz in *Reframing Governance II*, “single organizations can no longer appropriately match the scale for the most critical and substantive community issues and problems.”<sup>17</sup>

The growth in research, tools and resources dedicated to collective impact is a clear indication that more organizations are participating in this kind of boundary-spanning work. At the same time, approaches that put clients at the centre of social service and health care programs and services are eroding barriers and fostering collaborations within organizations and across autonomous but interdependent parts of a single system. Leaders driving these changes view success from a systems perspective – they understand their organization’s mission cannot be achieved unless other sectors or other organizations in their ecosystem succeed as well.

After decades of honing their missions and fine tuning branding for their programs and services, organizations now need to think differently about competition. As stated in *Convergence*, organizations must “decide where they are the strongest competitor, where they should partner with others, and where they will strategically choose to cede ground”.<sup>18</sup>



### 3. NETWORKED AND COLLABORATIVE ACTION

In making these decisions, organizations naturally shift into the field of co-opetition – cooperating with an organization that is normally a competitor to achieve a mutually desired result. At the same time, organizations are becoming more adept at making choices about when to be a partner and when to move forward independently with their own agenda.

Nonprofit organizations' relationships with government are also changing. In the past, government-funded nonprofits were seen as filling the gaps left by the public service or as delivering programs on the government's behalf. This created a dependence on government largess. In contrast, organizations like ONN and Imagine Canada are repositioning the sector as working with, not for, government to meet community needs.

As a nonprofit's relationship with government evolves from that of a dependent to that of a partner, it will gain strength as an advocate that informs and guides policy decisions. Nonprofit organizations are uniquely positioned to contribute front-line knowledge and they have the ability to engage and convene community stakeholders from all sectors in non-partisan discussions and initiatives.

#### Action ideas

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- *Identify players that affect your organization's ability to advance its mission by developing a Theory of Change or system map. Include allies as well as organizations traditionally viewed as competitors.*
  - *Determine when it is better to work as a single organization and when a networked or collaborative approach is better.*
  - *Create a culture that enables system thinking e.g. thinking that values impact ahead of growth in revenue and service volume.*
  - *Work with sector associations that advocate governments to design accountability systems and adjust timeline expectations to reflect the complex nature of collaborations.*
  - *Have courageous conversations that focus on tough questions e.g. is our work duplicative or misaligned with the efforts of others and if so, what are we going to do differently.*
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#### Invest strategically

As organizations grapple with the complex and competitive environment, their leaders are motivated to find alternative ways to get better results and to strengthen operational and program efficiencies through collaborations and networks. There has been a significant growth in collaborations, such as:



### 3. NETWORKED AND COLLABORATIVE ACTION

- sharing and integrating administrative and support functions and/or programs
- establishing a hub where organizations co-locate to enhance the potential to share services, knowledge and efficiencies
- using a shared platform as an alternative to forming a legally incorporated organization. The ONN defines a shared platform as “a situation where an organization ‘adopts’ and provides a legal home for a project or initiative that is unincorporated and does not have its own legal status”.<sup>19</sup> Shared platforms reduce the need for overhead and allow for a greater focus on delivering programs.
- forming joint ventures or co-sponsoring programs and initiatives

Entering into collaboration is a strategic decision that involves weighing benefits, which may be considerable, with potential challenges that can include unpredictability, significant investments of time and other resources, loss of control, and risk.

Leading in this increasingly networked and collaborative environment requires a unique set of competencies as Bill Traynor points out in “Vertigo and the Intentional Inhabitant: Leadership in a Connected World”.<sup>20</sup>

Moving from a traditional environment to a network or connected environment can cause a kind of vertigo... It operates by different rules and responds to different stimuli. Armed only with the perspectives and skills honed in traditional settings, one who tries to lead in a network environment can find the task unsettling and disorienting.

As a more networked and collaborative approach takes hold, leaders talk about co-competition, co-venturing and co-creation and develop the dexterity to straddle the mindsets and practices of formal centralized structures as well as adaptive and agile network structures. In this environment, leaders covet skills such as the ability to think at a systems level and to facilitate, engage, and innovate. They understand that collaboration is about “giving up something – some amount of control, autonomy and flexibility – in exchange for an outcome that can’t be produced alone”.<sup>21</sup>

When organizational leaders embrace this way of working, they come to think of leadership not only as a single person’s set of characteristics or behavior but also as a process that aligns the efforts of all those who are working together toward change. While governance decisions for the organizations participating in the collaboration will continue to be made by their boards, governance decisions for the collaboration are made outside the individual board rooms because accountability for results and risks are shared by all partners.

#### Action ideas

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- *Invest heavily in the up-front time it takes to build trust, find common cause and design appropriate governance structures and systems with collaborative partners. Avoid collaborations that are “shotgun marriages”.*<sup>22</sup>



### 3. NETWORKED AND COLLABORATIVE ACTION

- *Hardwire collaboration into the organization's strategic plan, performance dashboards and the leaders' job descriptions.<sup>23</sup>*
  - *Ensure that the benefits of each collaboration exceed the costs (e.g. time, resources, risks) and that each collaboration advances the mission and improves programs for those served.*
  - *Use recruitment and training to acquire and develop board and staff competencies that support good collaborations. These competencies include comfort with complexity, ability to balance diverse interests, the skill to influence through persuasion rather than through power and authority, and the capacity to drive results while valuing consensus.*
  - *Ensure the organization works collaboratively internally before expecting to work collaboratively with external partners.*
- 



#### Strategic questions

1. What role does the larger system play in our ability to achieve our mission? How do we create success for the larger system as well as remain firmly moored to the organization's purpose?
2. When is a network or collaboration the best approach? When are they not the best approaches?
3. How can we be more intentional and strategic about our collaborations?
4. How do we ensure our board and staff have the competencies necessary for our organization to be a good collaborative partner and to be successful in our collaborations?

#### A few good resources

**Collaboration Coach:** [www.collaborationcoach.ca/](http://www.collaborationcoach.ca/)

**Network Weaver Handbook:** [www.networkweaver.com/product/network-weaving-handbook/](http://www.networkweaver.com/product/network-weaving-handbook/)

**Shared Services: A Guide to Creating Collaborative Solutions for Nonprofits:** [www.chfcanada.coop/eng/pdf/fedconf\\_2014/5.%20Shared%20Services%20a%20Guide%20to%20Creating%20Collaborative%20Solutions.pdf](http://www.chfcanada.coop/eng/pdf/fedconf_2014/5.%20Shared%20Services%20a%20Guide%20to%20Creating%20Collaborative%20Solutions.pdf)

**Tamarack Institute:** [www.tamarackcommunity.ca/](http://www.tamarackcommunity.ca/)

**Working Wikily 2.0: Social Change with a Network Mindset:** [www.workingwikily.net/Working\\_Wikily\\_2.0.pdf](http://www.workingwikily.net/Working_Wikily_2.0.pdf)



### 3. NETWORKED AND COLLABORATIVE ACTION



#### One good idea

*Act like an organization, but think like a movement. Would-be change-makers must tend to the day-to-day tasks of research, raising money, planning and management. But the chances that their efforts will achieve scale improve dramatically if the work is undergirded with relationships based on common vision and value – relationships that span diverse organizations, sectors, and political affiliations.*

Tamarack Institute Collective Impact 3.0<sup>24</sup>



## 4. DEEPER AND BROADER ENGAGEMENT

- Navigate through the complex marketplace
- Create authentic conversations
- Tap into the passion for causes
- Provide flexible and customized options

Advances in technology, increased competition and generational differences have created a profound shift in the way organizations connect and communicate with their donors, volunteers and constituents.<sup>25</sup> As a result, organizational leaders must adapt their strategies, not just tweak old ones, so they enable deeper and broader engagement. They must be able to tell compelling stories efficiently and effectively in the digital world.

### Navigate through the complex marketplace

“Doing good” was once the domain of nonprofit organizations. However, in today’s marketplace the once sharp lines that distinguished nonprofit and for-profit are blurring. This is evidenced by the growth in the number of nonprofits running business ventures and the number of corporations independently advancing their own social agendas.

At the same time, entrepreneurs and others are establishing networks, social enterprises, and other vehicles to create social change in their communities and around the world using technologies and social media to self-organize without centralized planning and infrastructure. Technology allows them to “come together and disassemble as needed to achieve goals”.<sup>26</sup>

These shifts have disrupted the traditional flow of support for nonprofit organizations as corporations and individuals access informal and direct-to-cause support.<sup>27</sup> Convergence says that, “These trends will seriously challenge nonprofits to maintain their tenuous hold on identity as a sector and not just become under-capitalized competitors in an increasingly blended economy”.<sup>28</sup>



## 4. DEEPER AND BROADER ENGAGEMENT

### Action ideas

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- *Prepare a case that can be made to potential donors and leadership volunteers about the unique competencies of traditional non-profit organizations and what they can accomplish better than anyone else or any other approach.*
  - *Design strategies to bring entrepreneurial, individual-driven, and corporate causes and initiatives into the organization's orbit. Ensure that the organization's culture, people and processes are equipped to work effectively with them.*
- 

### Create authentic conversations

Technologically savvy donors, volunteers and constituents are expecting more authentic conversations with the organizations they support. Highly controlled and “overtly marketed” messages do not resonate with them, particularly if organizations are sending the “same tired message, but just delivered through a new medium”.<sup>29</sup> The “broadcast mode of talking ‘at’ supporters no longer works. Instead, organizations need to be talking ‘with’ them”.<sup>30</sup>

The greater ease of interaction, expectations for greater stakeholder input and cultural diversity mean there are more voices to be heard and a greater range of issues to be managed than ever before. It also means that there are more opportunities, particularly for those with ‘lived experience’, to help seek solutions and identify emerging issues.

Convergence points out that talking with rather than at supporters presents “a cultural challenge for leaders who are used to the organization speaking with one voice through authorized people and with carefully crafted messages”. In the coming decade, if organizations are to be credible, “everyone in the organization needs to be empowered to be a spokesperson”.<sup>31</sup>

To respond to donors, volunteers and constituents who expect deeper, more meaningful engagement, organizations may find that they need to revise their governance structure and practices so that more information can be shared and more people can be involved in making decisions. While this creates the potential to make better decisions and generate deeper and broader ownership, it also makes the question “to whom are we accountable?” more complex and crucial. Answering this question requires leaders to balance the benefits of richer input and broader decision-making with the need to ensure that accountabilities and processes do not become convoluted and that decisions are the right ones rather than the best compromise.



## 4. DEEPER AND BROADER ENGAGEMENT

### Action ideas

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- *Ensure everyone within the organization understands and agrees with its purpose, goals and impacts. Agreement will build confidence about opening the organization to more authentic conversations e.g. more transparent, two way conversations.*
  - *Ensure that communications and engagement are not siloed within the organization; these functions should be embedded in all strategic areas.*
  - *Begin from the position that all information will be available internally and externally and then work backward to identify information that cannot be shared.*
  - *Find better ways to engage key stakeholders than simply putting them on the board as representatives of their stakeholder groups.*
- 

## Tap into the passion for causes

The generations that now represent the largest market for donations and volunteers have different expectations about how they want to contribute than did previous generations. While older Canadians may still be content with a passive role – writing a cheque to the same organizations year after year or volunteering for ancillary organizational functions – younger Canadians desire an active role. They want to be hands-on in leveraging their money, time and talent to achieve measurable results particularly related to perennial issues and root causes.

Unlike previous generations, which tended to remain loyal to an organization and its mission, the majority of younger volunteers and philanthropists care more about causes and issues than about particular organizations.<sup>32</sup> They tend to look for an organization that ‘is solving the problems I care about’ and migrate to them,<sup>33</sup> regardless of whether the migration takes them to a nonprofit, a social enterprise, a group of activists, or a group of friends.

When younger donors, volunteers and constituents are deeply moved, they use crowdsourcing platforms and social media to share their passion for causes with personal and professional networks and to raise funds, recruit volunteers and increase awareness.<sup>34</sup> Their ability to become digital marketers for causes they support makes peer influence an increasingly important currency for nonprofits, but only if used effectively.<sup>35</sup>

### Action ideas

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- *Position opportunities to give and to volunteer as working through and with a cause rather than for the organization. For example, use*



## 4. DEEPER AND BROADER ENGAGEMENT

*imagery and video that allow potential contributors to experience the needs of those served and the outcomes achieved and see clearly where and how they can make an impact.*

- *Go beyond one-way feedback mechanisms (e.g. surveys) to engage donors, volunteers and constituents in two-way conversations (e.g. social media, town halls, and participatory research).*
  - *Develop a strategy to engage potential digital marketers as advocates and ambassadors.*
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### Provide flexible and customized options

Previous generations of donors and volunteers responded to a ladder or pyramid of engagement. They entered at the bottom and then, through calculated interactions, made their way to the top. But for other generations, engagement is more fluid. Supporters may enter anywhere on the ladder and move randomly among levels.<sup>36</sup>

Nonprofits must respond to this randomness by placing donor and volunteer preferences at the centre and being able to work with a great diversity of perspectives, interests, values and assumptions. KCI Trends describes the “rules of engagement for the ‘new’ donor” as follows:

The traditional model sees charities asking for money to support their particular needs and priorities, whereas the new model is one where charities create opportunities to believe in something and advance an agenda of mutual importance.

Rooted in an ability to choose that is now a reality in most parts of their lives, they reject the limitations of being told what to do. They are looking for the freedom and fluidity of choice, wanting to have a say in what they support and how they go about making that support a reality.<sup>37</sup>

Given the challenge of grabbing and holding people’s attention, convenience becomes paramount. The “firm handshake, well timed phone call or a carefully crafted appeal letter”<sup>38</sup> that worked in the past, is no longer enough. Looking to the next decade, it will not be a question of whether to use direct mail, personal interaction, online or texts, tweets or video, but rather how to use them all most effectively. As well, highly relationship-based fundraising continues to be important, but there is also significant potential for mass-campaign methods with their “issue based, real time, flash-funding appeals”.<sup>39</sup>

Volunteers also want a range of options. Some are interested in one-time or episodic opportunities to micro-volunteer – to help in a small, convenient way without making a long-term commitment.<sup>40</sup> Other volunteers want longer-term, pro-bono work that uses and enhances their expertise and skills, although not always in their chosen profession. Some



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people want to be virtual volunteers who fulfill their tasks online as well as in-person.

Technology is also changing the quality and nature of interactions between nonprofit organizations and the people they serve. While organizations cannot assume that technology is available to everyone, a growing majority of people expect nonprofits to use technology to engage them and to make services and programs more efficient and tailored to their needs. Examples abound such as virtual support programs for clients that are geographically dispersed and life skills programs for youth that are offered digitally.

### Action ideas

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- *Use technologies and social media strategically as part of a larger communication plan and link them directly to the organization's strategic priorities.*
  - *Position the ways donors, volunteers and constituents can get involved as "co-creating the future" rather than "meeting the organization's needs".*
  - *Consider how the organization can use crowdfunding to bring in new supporters.*
  - *Create pro-bono programs for volunteers that allow them to contribute their expertise to the cause.*
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### Strategic questions

1. How can we be a more open, transparent organization that provides broader decision-making opportunities for donors, volunteers and constituents while also managing the risks these bring (e.g. risks related to our brand, security, privacy, and the quality of our decisions)?
2. How will it change our structure, processes and culture if we put the donor's, volunteer's and constituent's preferences at the centre of our engagement strategies?
3. What is the largest, most strategic array of opportunities we can offer to donors, volunteers and constituents who want to work with us to advance the mission?



## 4. DEEPER AND BROADER ENGAGEMENT

### A few good resources

**Bridging the Gap:** [volunteer.ca/content/bridging-gap-summary-report](http://volunteer.ca/content/bridging-gap-summary-report)

**Cause, Influence and the Workplace:** The Millennial Impact Report Retrospective: [casefoundation.org/wp-content/uploads/2016/11/FiveYearRecap\\_MIR\\_1123161.pdf](http://casefoundation.org/wp-content/uploads/2016/11/FiveYearRecap_MIR_1123161.pdf)

**Convergence:** [www.lapiana.org/Portals/0/Convergence\\_Report\\_2009.pdf](http://www.lapiana.org/Portals/0/Convergence_Report_2009.pdf)

**KCI Trends:** [kciphilanthropy.com/download\\_trends/2015\\_2/pt-2015-02.pdf](http://kciphilanthropy.com/download_trends/2015_2/pt-2015-02.pdf)

**Nonprofits Integrating Community Engagement Guide:** [www.buildingmovement.org/pdf/NICE.pdf](http://www.buildingmovement.org/pdf/NICE.pdf)



### One good idea

*The Canadian Cancer Society is challenging Canadians to support pioneering scientists... This year, the Society's GivingTuesday campaign includes an added twist – the ability for donors to vote for the cancer researcher they think should win the honor of receiving the \$200,000 Great Canadian Innovation Grant which supports scientists who are taking unconventional approaches in the hope of making unexpected discoveries that could change the way we prevent, diagnose or treat cancer.*

Charity Village<sup>41</sup>

## ENDNOTES

- <sup>1</sup> In this resource, 'nonprofit' refers to those organizations which are formally constituted or legally registered as a non-profit or charity. They could also be called community benefit organization.
- <sup>2</sup> Bridget Hartnett and Ron Matan, *Generational Differences in Philanthropic Giving*, Sobel and Co. Fall 2014
- <sup>3</sup> Philanthropic Trends Quarterly, *The Change and Adaption Issue*, KCI, 2015 Issue 2, p 8
- <sup>4</sup> Mowat NFP, Ontario Nonprofit Network and Toronto Neighbourhood Centres, *Change Work: Valuing Decent Work in the Not-For-Profit Sector*, November 2015, p 23
- <sup>5</sup> *ibid*
- <sup>6</sup> Tim Broadhead, *On Not Letting A Crisis Go To Waste: An Innovation Agenda for Canada's Community Sector*, The Philanthropist, 2010 Volume 23.1 p 98
- <sup>7</sup> Allyson Hewitt, *HUB Ottawa Impact and Failure Report*, 2015
- <sup>8</sup> Mario Morino, *Leap of Reason: Managing to Outcomes in an Era of Scarcity*, A Venture Philanthropy Partners Publication, 2011 p 96
- <sup>9</sup> Elizabeth McIsaac, StellaPark and Lynne Toupin, *Human Capital Renewal in the Nonprofit Sector*, Ontario Nonprofit Network, June 2013, p 14
- <sup>10</sup> Mowat NFP, Ontario Nonprofit Network and Toronto Neighbourhood Centres, *Change Work: Valuing Decent Work in the Not-For-Profit Sector*, November 2015, p 8
- <sup>11</sup> Imagine Canada, *4 Myths About Young People and Non-Profit Work*, Blog, August 2016
- <sup>12</sup> Gregory Saxton, *The Participatory Revolution in Nonprofit Management*, Nonprofit Quarterly, August 2012, p 6
- <sup>13</sup> Elizabeth McIsaac and Carrie Moody, *Diversity and Inclusion: Valuing the Opportunity*, Mowat Centre, February 2014 p 1
- <sup>14</sup> *ibid*
- <sup>15</sup> Claude Lauziere, *Five Fundamental Shifts for a Shifting Sector*, Community Knowledge Exchange, January 2016, p2
- <sup>16</sup> Ted Ball, *Designing and Aligning Collaborative Governance Strategies, Structures, Cultures and Skills*, November 2014
- <sup>17</sup> David Renz, *Reframing Governance II*, Nonprofit Quarterly, January 2013 p2
- <sup>18</sup> Heather Gowdy, Alex Hildebrand, David La Piana and Melissa Mendes Campos, *Convergence: How Five Trends Will Reshape the Social Sector*, The James Irvine Foundation, November 2009, p23
- <sup>19</sup> Ontario Nonprofit Network, *Shared Platform Guidebook*, 2016, p9
- <sup>20</sup> Bill Traynor, *Vertigo and the Intentional Inhabitant: Leadership in a Connected World*, Nonprofit Quarterly, August 2009 p2
- <sup>21</sup> Russell M. Linden, *Leading Across Boundaries*, Jossey-Bass, 2010, p 66

- <sup>22</sup> Mark Fulop, *Nonprofits Need to Invest in Collaboration*, Pulse LinkedIn, September 2016
- <sup>23</sup> Ibid.
- <sup>24</sup> Mark Cabaj and Liz Weaver, *Collective Impact 3.0: An Evolving Framework for Community Change*, Tamarack Institute, Community Change Series, 2016 p3
- <sup>25</sup> 'Constituents' are defined as those that benefit from or are affected by the organization.
- <sup>26</sup> Diana Searce, Gabriel Kasper and Heather McLeod Grant, *Working Wikily 2.0*, Monitor Institute, March 2009, p4
- <sup>27</sup> Independent Sector, *Nine Trends Affecting the Nonprofit Sector*, 2015
- <sup>28</sup> Heather Gowdy, Alex Hildebrand, David La Piana and Melissa Mendes Campos, *Convergence: How Five Trends Will Reshape the Social Sector*, The James Irvine Foundation, November 2009, p16
- <sup>29</sup> Ibid. p23
- <sup>30</sup> Matt Price, *How Funders Can Support Deeper Engagement with the Nonprofit Sector*, The Philanthropist, December 5, 2016
- <sup>31</sup> Heather Gowdy, Alex Hildebrand, David La Piana and Melissa Mendes Campos, *Convergence: How Five Trends Will Reshape the Social Sector*, The James Irvine Foundation, November 2009, p10
- <sup>32</sup> Bridget Hartnett, Ron Matan, *Generational Differences in Philanthropist Giving*, Sobel & Co, Fall 2014
- <sup>33</sup> Matthew Couto, *8 Digital Trends Affecting Nonprofits Today*, Techsoup Canada, July 20, 2016
- <sup>34</sup> Philanthropic Trends Quarterly, *The Change and Adaption Issue*, KCI, 2015 Issue 2 p5
- <sup>35</sup> Marina Glogovac, *6 Trends Disrupting the Charitable Sector Now*, Huff Post, August 2016
- <sup>36</sup> Achieve, *Cause, Influence and the Workplace: The Millennial Impact Report Retrospective: Five Years of Trends*, November 2016, p12
- <sup>37</sup> Philanthropic Trends Quarterly, *The Change and Adaption Issue*, KCI, 2015 Issue 2, p 5
- <sup>38</sup> Peter Panepento, *Fundraising in a Multichannel World: How the Explosion In Technology is Transforming the Science of the Ask*, The Chronicle of Philanthropy, 2016
- <sup>39</sup> Edward Jackson, *Regrouping, Recalibrating, Reloading: Strategies for Financing Civil Society in Post-recession Canada*, The Philanthropist, 2010, Volume 23.3 p363
- <sup>40</sup> Heather Gowdy, Alex Hildebrand, David La Piana and Melissa Mendes Campos, *Convergence: How Five Trends Will Reshape the Social Sector*, The James Irvine Foundation, November 2009, p14
- <sup>41</sup> Charity Village, *Giving Tuesday Offer Donors the Opportunity to Vote on Cancer Research Projects*, November 21, 2016

## Sources of information on high-level trends

### **Imagine Canada**

[www.imaginecanada.ca/sites/default/files/imaginecanada\\_charities\\_in\\_canada\\_as\\_an\\_economic\\_sector\\_2015-06-22.pdf](http://www.imaginecanada.ca/sites/default/files/imaginecanada_charities_in_canada_as_an_economic_sector_2015-06-22.pdf)

### **Global Trends**

[www.globaltrends.com/2015/12/02/gt-briefing-december-2015-10-trends-to-watch-for-2016-and-beyond/](http://www.globaltrends.com/2015/12/02/gt-briefing-december-2015-10-trends-to-watch-for-2016-and-beyond/);

### **Philanthropy and the Social Economy**

Blueprint 2016, Lucy Bernholz: [www.grantcraft.org/assets/content/resources/blueprint\\_2016\\_final\\_web3.pdf](http://www.grantcraft.org/assets/content/resources/blueprint_2016_final_web3.pdf)