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Building Renewed Relevance: Portraits of CEOs Rebranding Iconic Nonprofit Organizations

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A Dissertation

Submitted to the PhD in Leadership and Change Program of Antioch University

in partial fulfillment for the degree of

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This dissertation has been approved in partial fulfillment of the requirements for the degree of PhD in Leadership and Change, Graduate School of Leadership and Change, Antioch University.

Dissertation Committee

- Mitchell Kusy, PhD, Committee Chair
- Jon Wergin, PhD, Committee Member
- Kathy Kretman, PhD, Committee Member

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My dissertation journey was full of surprises, joy, frustration, stress, and many, many more emotions. Alone, these emotions would have been without meaning. But, with the people who went on this journey with me, the emotions became full of meaning and significance. Thus, the end of the journey is not mine alone to celebrate. I should and will share the celebration with all of those who came along with me on my path.

To Steve, Mom, Lara, Bard, Cassie, Jenna, Riley, and the rest of my family—I am back! Thank you for giving me time, space, and understanding when I needed it most.

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To my supervisors and colleagues at the Peace Corps, FEMA, and Keep America Beautiful—thank you for your support in understanding the value of this journey to me and to the organizations we love. I hope the result benefits us and the world we serve to change for the better.

To the eight nonprofit CEOs who gave their time, knowledge, and insight to inform my research—thank you for what you gave me and the nonprofit sector through your participation in this study.

The list of people to whom I am grateful on this journey is endless. You all know who you are. To you—all my gratitude.

Abstract

In the United States, we often refer to the social sector as one leg of a three-legged stool. The private and public sectors support the other two legs. The social sector made up of nonprofit, nongovernmental, and charity organizations, contributes to the development of American society by focusing on social good rather than the desire to make profit. For decades, the sector has functioned as the social conscience of our society. However, many iconic, legacy nonprofits have struggled to keep their relevance in today's world: their creation tied to a past societal problem, their mission and brand no longer germane to today's generations. This study examined top-level—Chief Executive Officer (CEO)—leaders of iconic, legacy nonprofit organizations who have worked to implement reform and change through rebranding for renewed relevance. The research looked particularly at these primary areas: (1) What drove the leader to innovate and rebrand their organization and what does it mean to them personally and professionally? (2) What leadership practices did the CEO incorporate to allow the changes and reforms to be successful and why does the CEO believe they worked? The research methodology utilized for this dissertation was qualitative portraiture; portraiture interviews were audio and video recorded for research purposes. This research adds to the body of knowledge about successful leaders of iconic nonprofit organizations and the best practices for achieving renewed relevance through nonprofit rebranding. This research could aid with building an awareness of the successes and challenges of nonprofit leaders and could increase the interest of potential organizational stakeholders in the future. Six supplemental Mp4 video files of participant interviews accompany this dissertation. This dissertation is available in open access at AURA: Antioch University Repository and Archive, http://aura.antioch.edu/ and OhioLINK ETD Center, https://etd.ohiolink.edu/.

Keywords: Nonprofit, Non-profit, Executive Director, Chief Executive Officer, ED, CEO, Leader, Leadership, Rebrand, Change, Relevance, Iconic, Legacy, Innovation, Change, Portraiture

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Jennifer Sirangelo (Jennifer.mp4)	Mp4	1.5 GB	16:25 min
Stacey Stewart (Stacey.mp4)	Mp4	1.51 GB	16:35 min
David Yarnold (David.mp4)	Mp4	666.4 MB	9:54 min

Chapter I: Introduction

In the early 20th century years through 1960, many of today's iconic nonprofits were founded or increased their services in response to the needs and desires of American citizens that their government could not, or refused to, meet. With two world wars, drought, and the great depression looming, the U.S. Government was focused on becoming a world leader and economic growth. This led to the expansion of the social sector and many nonprofits we still know today were founded. Nonprofits such as those displayed in Table 1.1 are considered to be iconic for the purposes of this research. These nonprofit organizations are still today the safety net for many Americans and their society.

Table 1.1

Iconic Nonprofit Organizations in the United States and Year Founded

Iconic Nonprofit	Year Founded
YMCA	1851
YWCA	1858
American Red Cross	1881
Sierra Club	1892
Association of Junior Leagues International	1901
4-H	1902
Goodwill Industries	1902
National Audubon Society	1905
Rotary International	1905
Boys and Girls Clubs of America	1905

Boy Scouts of America	1910
Girl Scouts of America	1912
American Cancer Society	1913
Planned Parenthood	1916
League of Women Voters	1920
American Civil Liberties Union	1920
March of Dimes	1938
Outward Bound	1941
Ad Council	1942
United Negro College Fund	1944
AFS Intercultural Programs	1946
Muscular Dystrophy Association	1950
The Nature Conservancy	1951
Keep America Beautiful	1953
The Humane Society of the United States	1954
American Association of Retired Persons	1958

The social sector in the United States is often referred to as one leg of a three-legged stool. The other two legs are supported by the private and public sectors (Lovegrove & Thomas, 2013). The social sector, comprised of nonprofit, nongovernmental, and charity organizations, contributes to the development of American society by focusing on social good rather than the desire to make profit. For decades, the sector has functioned as the social conscience of our society. The social conscience is the collective consciousness of a society reflected in a

collective identity, self-awareness, and unified goals. However, many iconic, legacy nonprofits have struggled to keep their relevance in today's world, their creation tied to a past societal problem, their mission and brand no longer germane to today's generations.

Nonprofits founded prior to 1960 in the United States, and still striving to meet an unmet need in an increasingly needy country, have not only survived but also thrived because of their ability to be flexible and adapt to the decades through which they have traveled. I believe it is because of their ability to change, innovate, and reform that they have survived and continue in this decade, and future decades, to ignite the social change needed at any given moment. When a nonprofit organization stops adapting, they will fail and no longer be relevant to the generation at hand.

The Nonprofit Leader

In a typical nonprofit, the Chief Executive Officer (CEO) or Executive Director (ED) role is one of singular importance (Drucker, 1990; Heimovics & Herman, 1989; Menefee, 1997; Phipps & Burbach, 2010). As the top-level leader of a nonprofit organization, the CEO or ED defines the direction and the path for the organization's stakeholders. She or he determines the interpretation of the mission and is a part of the organizational brand. For the purposes of this research, the terms CEO and ED were used interchangeably.

Particularly in small- to medium-sized nonprofits (organizations with less than 100 million dollars in annual gross receipts), the CEO is involved in practically every decision made in the organization, including, but not limited to, strategic planning, personnel, programming, training, and fundraising (Riggio & Orr, 2004; Dargie, 1998). Additionally, many nonprofit CEOs have direct influence on the governance of the organization through their formal position on the board of directors and their relationship with the chair of the board and other board

members (Heimovics & Herman, 1989; Herman & Renz, 1998). In other words, nonprofit CEOs and EDs hold within their hands an enormous responsibility and extraordinary authority for insuring success of the organization (Herman & Heimovics, 1990).

Considering the incredible responsibility of the CEO, it is imperative nonprofit leaders understand how to create relevance, innovate, and rebrand to build a thriving social sector in a world that depends on its success. "Relevance is a matter of survival. As such, nonprofits must continually adapt to the radically changing world" (Perry, 2017, para 14). To be relevant, a nonprofit organization must be able to provide up-to-date, significant, and demonstrable services, resources, and information that satisfy the needs of the organization's stakeholders. In some cases, particularly with older nonprofits, rebranding is part of the effort to increase relevance. A nonprofit's brand is everything that comes to mind about the organization when it is thought about or mentioned. Therefore, to rebrand is to adjust or change the brand in order to change the image to one more attractive or significant to today's society.

"In the non-profit agency, mediocrity in leadership shows up almost immediately. One difference clearly is that the non-profit has a number of bottom lines—not just one" (Drucker, 1990, p. 17). The millennial generation, otherwise known as tomorrow's nonprofit organization stakeholder and donor, expects more from the sector than ever before. Nonprofit leaders must be able to redefine their value proposition to adhere to the desire of donors to drive how their money is being used and how they are being recognized for their generosity. Additionally, the private sector has come to realize they must do more than satisfy their customers and shareholders. They know they must also contribute to the communities where they operate, and to the causes their business impacts (Cohen, Dow, Hansen-Turton, & Swinney, 2014). As private businesses and individuals are looking for places to donate their money, they are searching for

nonprofits making an impact in innovative, relevant ways that speak to the issues they care most about. Nonprofit leaders who have been able to increase their relevance, brand, and impact and find ways to involve and recognize their donors on a personal level will be more successful in this new world order.

Much of the research around rebranding, innovation, and relevance in non-profits quite naturally leads to the study of leadership and what type of leadership is best for organizations seeking change. According to Peter Drucker (1994), organizations characterized by deeply embedded leadership practices and organizational values risk success because they can stop questioning the need to change and respond to the external environment. More specifically, much of the research, quite naturally, examines transformational leadership as a model for change within nonprofit organizations.

In their seminal study, Heimovics and Herman (1989) conclude, "All major actors in nonprofit organizations believe the CEO is the central causal agent for outcomes in nonprofit organizations" (p. 308). They go on to describe the skills they believe to be most important for successful nonprofit CEOs such as human resource development, environmental analysis and organizational change, organizational control and productivity, and strategy formulation.

Kearns, Livingston, Scherer, and McShane's study (2015) suggests that "leaders of typical nonprofits utilize a lot of skills that can readily be taught, and some that can only be acquired and learned through experience" (p. 723). Using grounded theory methodology, the study finds nonprofit CEOs seem to rely on all of the skills outlined in the Heimovics and Herman (1989) conclusions. Additionally, Kearns et al. (2015) also "suggest that a rich and diverse set of interpersonal and conceptual skills may underlie many of the formal leadership

roles and functions of nonprofit CEOs, especially skills involving communication, mediation, and trust building" (p. 724).

The Role of the Nonprofit CEO in Rebranding for Renewed Relevance

A nonprofit cannot reform and innovate without a change leader, defined by Higgs and Rowland (2000) as leadership with the ability to influence and excite others through personal advocacy, vision, and drive, and access to resources to build a solid platform for change. From personal experience, I can attest to the fact that being a nonprofit CEO is not an easy job. And getting an iconic nonprofit, whose stakeholders are married to the way it was and always has been, to turn the boat to a new way of thinking, being, and doing is one of the hardest jobs in the world. Nonprofit stakeholders do not just believe in the mission. They do not just give a donation because they want the organization to do good work. They do not just volunteer their precious time because it is the right thing to do.They do so because they believe, in some small way, they own a piece of the organization and now have a say in its future. One thing all nonprofits have in common is simply said by consultant Joan Garry (2017), "Nonprofits are messy. Not enough money. Too many cooks. An overdose of passion" (p. xxi). But the simplicity of her next sentence is what is at the heart of nonprofit innovation and reform: "Leading nonprofits isn't easy" (Garry, 2017, p xxi). Anyone who has led an iconic nonprofit through a process of change can easily relate to what Garry writes in these few, simple sentences.

Purpose of the Study

With the results of this research, I hope to provide nonprofit leaders with some inspiration and ingredients in leading their own nonprofits to not only surviving, but also to growing and thriving. The United States, and the world, needs a strong social sector now more than ever before. And it will take dedicated leaders to ensure nonprofits within the sector are

able to serve their stakeholders and constituents in ways they need serving today as the government no longer can or will.

Significance of the Study

There is an increasing importance in the role nonprofit organizations play in our global society today. When we worry about the deterioration of our environment, lack of intercultural understanding, homelessness, and hunger, we often cite the need for the social programs nonprofits deliver. Yet, most nonprofit organizations struggle to make ends meet and achieve their goals as they were founded to do. Through this dissertation, I hope to shape a new view of nonprofit leadership, iconic organizations, and their successes in branding for renewed relevance. Usually, nonprofit success is measured by some sort of number or count such as the amount of food distributed, or number of felons enrolled in Bible study. By contrast, I am interested in how rebranding is viewed and implemented by the CEO or ED, what it means to the CEO or ED and the organizational stakeholders, and what role history, culture, and ritual play in strategy and decision-making.

Overall, there is not enough research on the nonprofit sector or on nonprofit leadership (Bielefeld, 2006; Phipps & Burbach, 2010; Kearns et al., 2014). The lack of research on the social sector leaves nonprofit leaders with only the option of translating general leadership research to fit the nonprofit sector, or to simply move forward in an experimental manner not necessarily knowing what would work in their particular setting. Thus, it seems clear there is a need in the field for more research in nonprofit leadership, repositioning, and rebranding.

> The nonprofit sector needs to develop its own research agenda and distribute findings to nonprofit managers. This process is in its infancy. Whereas research on the nonprofit sector has been vigorous over the last few decades, most of it has focused on giving and

> volunteering or on discovering and delineating the basic dimensions of the sector and (more recently) its relations with the other sectors. It is vitally important that management practices in the nonprofit sector be based on sound, useful research on nonprofit organizations. (Bielefeld, 2006, p. 397–398)

Research on non-profit organizations and leaders can be divided into "two camps, academics and practitioners or consultants, with widely differing agendas. The academics will adhere to the positivistic paradigm and associated quantitative methods whereas the practitioners will likely not explicitly consider the paradigm and be pragmatic and ad hoc in their choice of methods" (Bielefeld, 2006, p. 402). This study endeavors to bridge this gap with both rigor and relevance, while generating usable knowledge. To be rigorous, research must be thorough, accurate, and control potential bias. And to be relevant, a nonprofit organization must be able to provide up-to-date, significant, and demonstrable services, resources, and information that satisfies the needs of the organization's stakeholders.

Therefore, it was imperative my dissertation measured "actual events or outcomes versus the potentialities to produce these events or outcomes," and highlighted "concepts that are descriptive versus those that are more evaluative" (Bielefeld, 2006, p. 403). By developing research that creates understanding of how leaders of legacy nonprofit organizations have leveraged change and rebranding for renewed relevance, we have the opportunity to activate existing and new resources across the sector with the goal of truly addressing global problems at an increased scale.

By reviewing the existing literature on iconic nonprofits, nonprofit leaders, nonprofit change overall, and nonprofit rebranding specifically, it is clear to see how case study research (up-close, in-depth study of a person, place, or organization) on top-level leaders of iconic,

legacy nonprofits leverage rebranding for renewed relevance sits within the larger domain of prior research. One, there is little to no case study research on nonprofit leaders of any type and I could find none specifically on top-level leaders of legacy nonprofits. And, two, while the literature does support the need for rebranding in the case of older nonprofits, it does not refer to the CEOs and ED's who led the initiative to rebrand and how they moved through the changes. Understanding the process these iconic nonprofit leaders go through to create change and to rebrand for renewed relevance is extremely valuable to other leaders in similar roles. There are many valuable insights that we can learn from case study research in this subject area and valuable stories to be documented.

Research Questions

Through studying the top-level leaders of the iconic nonprofits who have thrived over the course of decades, I wanted to know, through my dissertation research:

1: In what ways do top-level leaders of iconic nonprofit organizations lead, motivate, communicate, and initiate change in order to rebrand their organizations to increase relevance?

2: What motivates top-level leaders of iconic nonprofit organizations to rebrand their organization?

3: How have these leaders been able to surmount the significant challenges presented by leading change in an iconic nonprofit?

Researcher Background

Beginning in May 2017, I took on the role of President and CEO of what most would call an iconic nonprofit organization. Sixty-six years old this year, Keep America Beautiful (KAB) is known for two key moments in its history. The first is the organization's tie to Lady Bird

Johnson. Beginning in 1965, during her time as the first lady of the United States, she took on the issue of highway beautification, famously stating,

> Ours is a blessed and beautiful land. But much of it has been tarnished. What can you do? Look around you: at the littered roadside; at the polluted stream; the decayed city center. We need urgently to restore the beauty of our land. (Keep America Beautiful, n.d., para. 4)

The second is the production of the famous "Crying Indian" public service announcement (PSA) campaign. In 1970, consumerism had infected the American culture and the result was litter strewn across the nation. American behavior during this time can be seen in modern television shows such as "Mad Men" with the portrayal of a picnic ending by the characters shaking out their blanket and leaving all of their trash on the ground (Weiner, Anderson, Jacquemetton, A., Jacquemetton, M., & Bernstein, 2008). The "Crying Indian" PSA depicted a Native American traveling across rivers and land to find it highly polluted with litter, ending with one single tear running down his face. The advertisement was extraordinarily successful and is given credit for stemming the tide on litter. Even today, it is studied in college courses on marketing as one of the single most successful advertising campaigns in history. The irony of the "Crying Indian" campaign is the actor playing the Native American was Italian and the tear is liquid silicone.

Nevertheless, this single public service advertisement and moment in history is what KAB is known for despite the subsequent years working to ensure every American has the right to live in a clean, green, and beautiful community. Moreover, the organization has recorded billions of volunteer hours in ending litter, improving recycling, and beautifying public spaces. And still today, KAB provides millions of dollars' worth of training and resources to hundreds of

communities each year to ensure the impact of the mission is carried out at the community level across the nation, and even in a few international locations.

While KAB has remained somewhat stagnant in the most recent decade, the last few years' degradation of environmental regulations and government oversight has provided an opportunity for the organization to fill some of the gaps in environmental regulation being left by the Trump Administration and the changes to the United States Environmental Protection Agency. In the case of KAB, the need has surfaced, and the organization must remain flexible to respond as necessary and able. As with much of the social sector around the world, the needs and gaps are large and only getting larger with increasing demand in the areas nonprofits exist to serve. Nonprofit organizations are the safety net, but they must be ready and nimble to respond within their mission area. While there are government safety nets continuing to provide social services such as the Social Security Agency and the Federal Emergency Management Agency, Americans are heavily dependent on nonprofit organizations to service those who fall through the cracks.

I have also worked with AFS Intercultural Programs (The organization was historically known as the American Field Service and changed their name to AFS Intercultural Programs to recognize the international nature of the organization and to discontinue use of the name originally from the United States' war-based ambulance service), a nonprofit whose revenue comes from selling high school exchange programs and cross-cultural experiences. Their mission is to develop intercultural understanding among participants to create world peace. In the case of AFS, the interest in their one-year program living with a host family and studying high school in a foreign country has significantly diminished among American youth. The organization has been slow to develop exchange programs or travel options that are attractive to today's young

American. Their brand is closely tied to the one-year high school exchange and host family experience. And, while they are a nonprofit, their programs are expensive, particularly for many Americans in lower income brackets who may be interested in such programs.

Like KAB, AFS is not a dying organization, but competitive organizations have come into the space to fill the need AFS did not fill fast enough. As a federated network of global nonprofit organizations, other AFS countries continue to have high demand for their students to participate in the one-year exchange in the United States and other English-speaking nations. However, while the mission of the international organization may be more important than ever before, the U.S. organization has not been flexible in responding to the needs of their stakeholders.

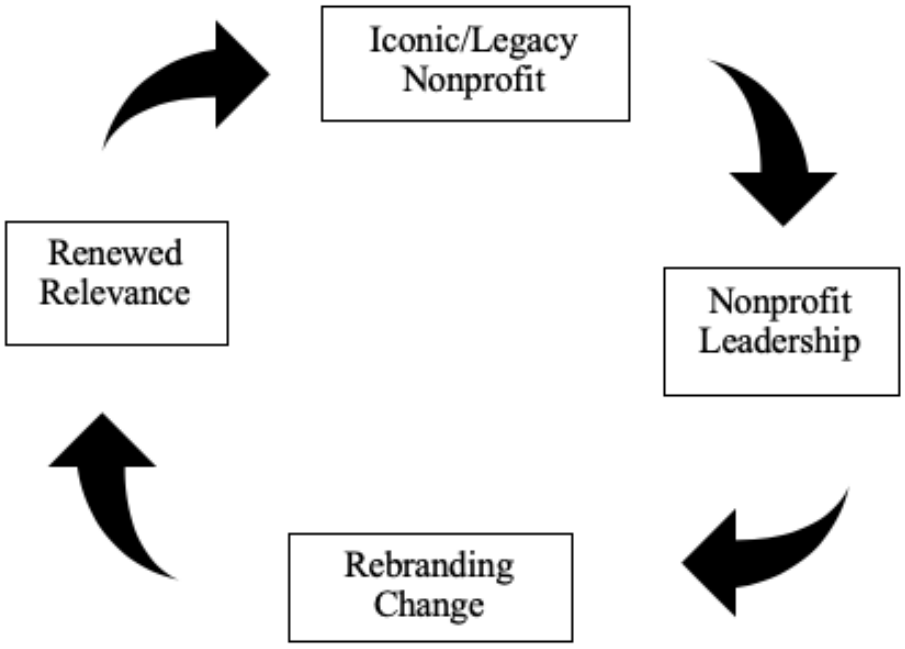


Figure 1.1. Topics and flow.

Throughout my research it was important for me to remember my own bias gained through these firsthand experiences working within two distinct iconic nonprofit organizations. On the other hand, it was these very experiences that inspired my desire to study and research change leaders who are reforming iconic nonprofits into the organizations they need to be to meet the needs of today's world. Through this research looking to understand the ways in which CEOs create change in iconic, legacy nonprofits I hope to inspire and support other leaders innovating for relevance in the social sector.

Study Assumptions

The study was situated at the crossroads of several varying streams of inquiry. The flow of this research and theoretical framework is depicted in Figure 1.1. For the purposes of my dissertation study, I focused on iconic, or legacy, nonprofit organizations founded in the United States before 1960. In my research I found two terms used to describe the type of nonprofit organization I studied: iconic and legacy. Merriam-Webster defines iconic as "a**:** widely recognized and well-established, and b**:** widely known and acknowledged especially for distinctive excellence" (Iconic, n.d., def. 1). And Merriam-Webster defines legacy as "of, relating to, associated with, or carried over from an earlier time, technology, business, etc." (Legacy, n.d., def. 6). Therefore, for my purposes, I chose to limit my research to nonprofits that are well-known and recognized, founded prior to 1960, and are based in the United States. For the purposes of this research, I used the terms legacy and iconic interchangeably.

While it was not my intent to research nonprofit organizations in their entirety, I did intend to research leaders who have transformed iconic, legacy nonprofits into thriving, relevant organizations. Although beyond the scope of my study, I believe there is value in briefly describing the context of an iconic, legacy nonprofit as a prelude to trying to understand the

nonprofit CEO experience within the extraordinary challenges that exist in maintaining relevance in today's age. An understanding of iconic, legacy nonprofits lays the groundwork for the study and supplies rationale for my research within nonprofit leadership.

Additionally, I define a brand as, "the complete collection of images of the charity, its products and/or the cause" (Tapp, 1996, p. 329) contained in a stakeholder's mind. As Tapp (1996) describes, "Under this definition, a well-informed RSPCA [Royal Society for the Prevention of Cruelty to Animals] supporter, for example, would see the brand image of the RSPCA as: the organisation itself, the way it deals with animals, its vision of what it is trying to achieve, how well it looks after supporters, and so on" (p. 329).

For the purposes of this research, a social sector organization is considered to be: a) private, that is, not controlled by government; b) primarily serving a social or public purpose, that is, their main purpose is to produce public or collective goods for others rather than to maximize returns to invested capital or to members or directors; and c) voluntary and without compulsion (United Nations Department of Economic and Social Affairs, 2018). The social sector around the world uses different terms including nonprofit, nongovernmental organization, charity, and more. Each is only slightly different in their structure and funding sources. Utilizing these three criteria, as outlined above, allows the incorporation of all types of organizations within the social sector, accounting for the entire sector without bias as to their funding source. Additionally, the various terms used in the social sector will be used interchangeably through this learning achievement, as is often the case when researching this subject.

Study Limitations

Like all research, this study had some limitations. First, it relied solely on self-reported, qualitative, interview data. Unlike quantitative methods, the nature of the inquiry in this research

could have led to participants supplying answers they believed to be desirable. While portraiture as a methodology seeks the positive and the good reflected in the portrait, it is also important to tell as much of the participant's experience as possible to fully gain from their experience. Another limitation of this study was in the goal of interviewing a diverse representation of nonprofit CEOs, EDs, and other leaders. Ideally, the study would be composed of a diverse cross-section of sex, race, educational backgrounds, and years of experience. However, the study was limited in the actual number of persons who fit the definition of an iconic nonprofit leader and agreed to take part in the study. The saying "beggars can't be choosers" comes to mind, and this was a limiting factor in the diversity of participants.

Chapter Outlines

Chapter II presents the literature that informs and enlightens this study. This literature review focuses on supplying background information and enabling historical interpretation of iconic nonprofits and nonprofit leaders in relation to rebranding and change to create renewed relevance. First, the writings and ideas that present the challenges of an iconic nonprofit will be synthesized. By understanding the challenges nonprofits face, we can better understand why change and rebranding might be needed. This follows by a longer discussion of nonprofit leadership and the challenges faced by the social sector in general to attract and keep qualified executives. Finally, I also consider how nonprofit leaders rebrand and create change to bring their organization into renewed relevance for today's audience and societal needs.

Chapter III is a presentation of the methodology and research design. This chapter discusses the importance of methodological fit and the rationale for the use of portraiture to explore the research questions for this study. The chapter also discusses the limitations of the current study. The last section of the chapter presents the ethical considerations of engaging in

this research study. Chapter III includes a pilot study conducted as a practice case. The reason for conducting this pilot study was to: 1) practice and improve my interviewing skills; 2) design and implement a practice study using portraiture analysis relevant to my dissertation research area; 3) assess the proposed interview questions to uncover possible difficulties; 4) practice my proposed interviewing technique utilizing both audio and video equipment; and 5) collect and analyze preliminary data. Yin (2014) describes a pilot study as "developing, testing, or refining the planned research questions and procedures" (p. 240) to be used later in the formal research study. The pilot study of Daniel Obst, President and CEO of AFS Intercultural Programs-International was ultimately utilized to inform the methodology chosen for the dissertation.

Chapter IV presents the results of the study through a presentation of written portraits. Supplemental videos of the CEO interviews complement each portrait. The chapter discusses the trends and themes as supported by the data compiled through the interviews and reflected in the written portraits. While each CEO will be presented as a portrait, the key findings will be provided as a comprehensive analysis of the entire compilation of data collected.

Finally, chapter V offers a conclusion of the study's findings and the expected practical application of the findings. The chapter also includes implications for leadership and change, as well as recommendations for further study around non-profit leadership in rebranding for renewed relevance. Chapter V brings together all earlier chapters, linking them together to present a cohesive and clearly articulated conclusion for the practical use in changing and improving nonprofits in the United States.

Chapter II: Critical Review of the Theory, Research, and Practice

This literature review focuses on supplying background information and enabling historical interpretation of iconic nonprofits and nonprofit leaders in relation to rebranding and change to create renewed relevance. First, I synthesize the writings and ideas that present the challenges of an iconic nonprofit. By understanding the challenges nonprofits face, we can better understand why change and rebranding might be needed. This section is followed by a longer discussion of nonprofit leadership and the challenges faced by the social sector in general to attract and keep qualified executives. Finally, I also review the literature and research on rebranding and creating change to bring a nonprofit organization into renewed relevance for today's audience and societal needs.

By considering the literature, practice, and research in the subject areas of iconic nonprofits, nonprofit leadership, nonprofit change, and nonprofit rebranding, I was able to build a body of background information, data, and knowledge to inform my own research questions:

1: In what ways do top-level leaders of iconic nonprofit organizations lead, motivate, communicate, and initiate change in order to rebrand their organizations to increase relevance?

2: What motivates top-level leaders of iconic nonprofit organizations to rebrand their organization?

3: How have these leaders been able to surmount the significant challenges presented by leading change in an iconic nonprofit?

These questions have both theoretical and practical significance. Theoretical significance, or the value this study will add to the existing body of research, is reflected in the specific focus on top-level leaders in iconic nonprofit organizations. This study lends support to

some of the findings of prior research on nonprofit leadership and rebranding, yet the research adds some new components, particularly regarding iconic and legacy nonprofits, as well as the focus on the leadership of CEOs and Executive Directors. Also, the study makes a methodological contribution to prior research by using portraiture to present the research results. The desire within the nonprofit sector for actual examples and stories of rebranding, leading change, and innovative practices to be applied elsewhere is reflected in the practical significance and value this study adds to the real world.

For the purposes of this literature review, I searched for research articles, books, media, and websites through several methods. As a practitioner, I was inclined to first search Google Scholar where I was able to find many journal articles I have included in this review. I then went on to search in the Antioch Online Library finding some additional articles different from those I found through the Google Scholar search. The terms used in searching for relevant research were:

- Nonprofit organization
- Charity
- Non-government organization
- Iconic Nonprofit
- Legacy Nonprofit
- Nonprofit Re/branding
- Nonprofit Innovation
- Nonprofit Leadership
- Nonprofit Change
- Nonprofit Relevance

Much of the research reviewed in this chapter was discovered by searching through reference lists within the most pertinent literature and research found. In this way, I found applicable and relevant academic journals (e.g. *International Journal of Nonprofit and Voluntary Sector Marketing*) and focused my search specifically within these journals. This allowed for discovery of articles and research from a historical perspective on the subject of nonprofit leadership and change. Upon seeing similar researcher names being cited in multiple journal articles, I located and used that research as foundational to the subject area (e.g., Heimovics & Herman, 1989; Kearns, 2012;Salamon, 2012; Tapp, 1996).

Iconic, Legacy Nonprofits

In the United States, we have fluctuated between 1.5 to 1.8 million nonprofit organizations. From 1970 to 2015, approximately 150 nonprofit organizations moved their revenue above $50 million. In comparison, 46,000 private sector businesses were able to move above this revenue mark (Elsey, 2015). In a time where our society needs a thriving social sector more than ever, this trend is cause for great concern. In the United States it is practically impossible to live and not to be served in some way by a nonprofit organization. Nonprofit organizations in our society today include churches, hospitals, schools, theatres, museums, zoos, and food banks providing vital services such as emergency aid, low-income housing, community organizing, and more. Additionally, nonprofits advocate for their missions, bringing the importance of issues they care about to public attention, and to the attention of government decision-makers influencing policy and regulations that affect the citizens, organizations, or animals they exist to serve (Salamon, 2012). As the public sector is tightening its purse strings and reducing services provided to its citizens, the social sector will be left to take care of those in need. Aside from its social and political importance, the nonprofit sector is also a significant

economic force in the United States, accounting for large shares of employment and national expenditures (Salamon, Anheier, List, Toepler, & Sokolowski, 1999).

Unless the organization has been through a process of reform, legacy nonprofits are intent on simply continuing their existence. In a review of the nonprofits listed in Table 1.1, many of these organizations were founded in response to a societal issue that supported a thriving movement with many notable achievements. Then, over a period of time, the mission became rigid and the structure became unlikely to change. Within time, the organization's frame of mind for the future, and those within it, became a simple ability to sustain oneself with a high degree of importance placed on filling positions and checking boxes rather than meeting the mission or achieving the intent of the organization (Schumaker, 2013).

Legacy nonprofits in the United States continue to work on extraordinarily important social issues. Yet they struggle with how to innovate, reform their models, and stay relevant in a time of unprecedented change. Challenges are coming at them in the form of economic uncertainty tied to fundraising and new technologies that drive new ways of working. These pressures threaten the existing strategies, business models, structures, and brands of legacy nonprofits fighting to stay relevant in an ever-changing world. Additionally, the support they receive from the public is perceived to be dwindling due to digital start-ups such as 350.org and MoveOn for example. In the business world, the prevailing practice is to allow the organization to die in name of creative destruction (McLeod-Grant, 2013a; Salamon, 2012). However, in the social sector these iconic organizations are "too valuable and hard-won not to be leveraged for greater social impact" (McLeod Grant, 2013d, para 3).

Some legacy nonprofits in the United States are built on an affiliate or franchise model, shown in Figure 1.2, including a headquarters serving as a coordinating body mobilizing programs and resources for their local, grassroots organizations around the country. These

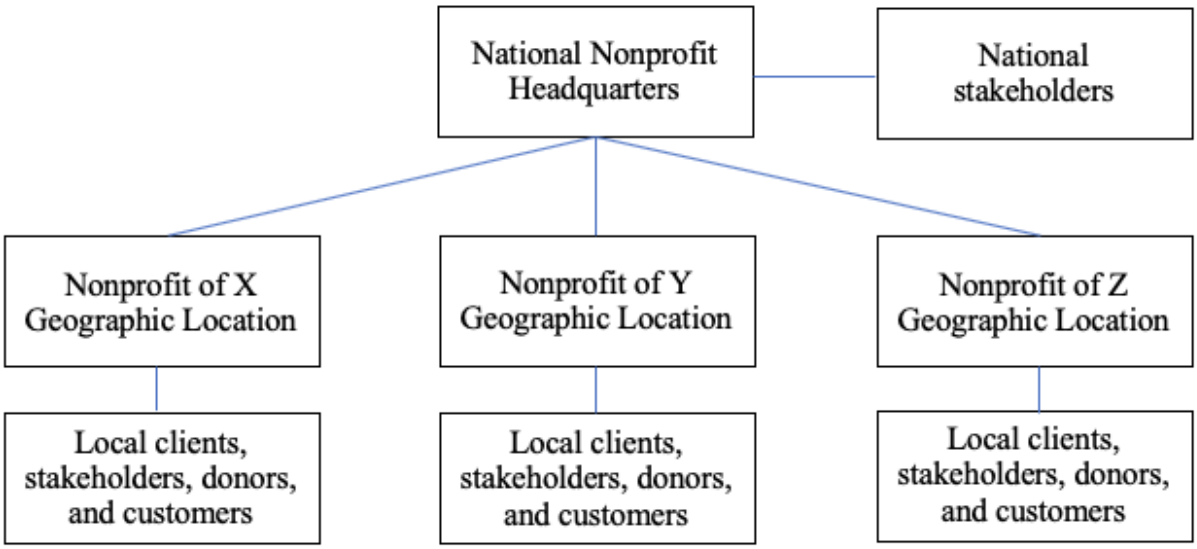


Figure 1.2. Federated model of nonprofit organization.

networks of organizations are most often found in legacy nonprofits due to the time and resources they take to build. Therefore, the ability to quickly scale programming when needs arise is one of the more valuable reasons for supporting older, well-established organizations. With these affiliated networks also comes the social network of millions of supporters and volunteers who believe in their cause and brand. Legacy organizations can rally millions to support the causes about which they care. And, while it is true that legacy nonprofits' business models can be antiquated, many of them have large annual revenue streams. The millions of Americans who support their causes are loyal donors who send in checks year after year, and simply do not care if the organization is not part of the young, cool-kids club. And while these donors may be aging, it could take some time before younger, sexier nonprofits are able to reach the level of revenue of an iconic, legacy nonprofit (McLeod Grant, 2013a). In other words,

would it not be more effective to spend a few thousand dollars to reform a legacy nonprofit to become a channel for implementing innovative, relevant programs?

"Early-stage organizations can often bring new ideas or innovations into an ecosystem of players in a given field. They are small, fast, nimble, and high-energy. But it's important to have larger organizations with the heft and weight to help influence the field. They can do things that even the most resourceful start-ups can't always do—mobilize a million people with a single email, leverage trusted relationships in Congress, or tend to a social need that isn't currently seen as cutting-edge…Given all of these assets, it is important to invest in "reinventing" these legacy organizations rather than just consigning them to the scrap heap of history" (McLeod Grant, 2013d, para 8).

In his book, *The State of Nonprofit America*, Lester Salamon (2012) describes the six challenges he views as the most pressing in the social sector today. These six summarize what most authors who write about the state of the United States' social sector also see as the biggest challenges. And, while these six challenges seem extraordinary, there is value in noting they all seem likely to persist and intensify in the coming years.

The fiscal challenge. Throughout the decades since nonprofits proliferated in the United States, their fiscal solvency has had numerous highs and lows. Much of their revenue growth has reflected the buoyancy of the United States economy and, specifically, the federal government's economic policies. "In the first place, America's nonprofit organizations confront a significant fiscal squeeze. This fiscal squeeze has waxed and waned over the sector's recent history stretching from 1965 to the present, but the current period appears to mark a new level of severity" (Salamon, 2012, p. 21).

Finding solutions for a legacy nonprofit in a fiscal crisis can be hard because of the resistance to change when it might be needed most. "It can be very hard for an established organization to take a risk on a new way to bring in revenue, even if its existing income streams are on the decline. A common challenge among these organizations is that their individual donor bases are large in volume but aging, and their ability to attract younger dues-paying members is dropping off. This creates an undeniable dilemma, since the organization is large enough that it can't afford to abandon the current model" (McLeod Grant, 2013a, para 6).

Most recently, the U.S. Congress passed the Tax Cuts and Job Act that went into effect in January 2018. While the actual impact to nonprofit organizations is still unknown, the predictions are dire. Due to the changes in the charitable deduction and estate taxes, nonprofits are expected to lose up to $24 billion a year in donations according to the Tax Policy Center (Rosenberg & Stallworth, 2017).

The competition challenge. Legacy nonprofits have recently seen the growth of the private sector moving into many of the traditional fields where the social sector has historically dominated. Activities from health care and employment training to higher education and welfare assistance are experiencing fast-paced growth in the private sector (Salamon, 2012).

Until recently, the government mostly prohibited the private sector from competing for social service contracts precisely because they were profit-seeking organizations. However, most government agencies at all levels are now reversing these policies. Government agencies are now basing their contract decisions on what an organization can do rather than what they are, being purposefully neutral about the role of any organization. "Nonprofits are no longer considered automatically entitled—or even best qualified—to provide social services in the United States" (Ryan, 1999, para 8).

One might argue that the scale of the world's problems is enormous compared to the scale of the solutions. Yet, the creation of new organizations, private and nonprofit, may not always be the answer. "In the face of this reality, we have to confront the fact that almost 90 percent of American nonprofits continue to operate on less than $1 million in total annual budget, and many of these small, fragmented groups are reinventing the wheel, or creating duplication of effort and infrastructure: most have their own staff, boards, administrative support, and fundraising capabilities. What's more, despite all the attention paid to social entrepreneurs and scaling high performing nonprofits, very few nonprofits—only one tenth of one percent—have gotten above the level of $50 million in annual income in the past twenty years" (McLeod Grant, 2013c, para 4).

The bottom line is the world needs innovative solutions to today's problems, but we do not need to create new organizations to house them. By starting thousands of new private and nonprofit organizations each year, and then trying to scale them up, we are only creating greater competition for already scarce resources. Unfortunately, extraordinarily little capital is available to the nonprofit sector for investing in desperately needed infrastructure, while private sector entrepreneurs can offer a profit-sharing structure to investors, supplying needed funding.

The effectiveness challenge. William Ryan (1999) writes, "Nonprofits are now forced to reexamine their reasons for existing in light of a market that rewards discipline and performance and emphasizes organizational capacity rather than for-profit or nonprofit status and mission. Nonprofits have no choice but to reckon with these forces" (para. 7). This notion is quite different from the historical theory in the nonprofit field emphasizing the social sector's advantage where normal market mechanisms do not exist because their stakeholders and constituents are not paying for their services. Rather than customer service and quality control,

trust is needed instead. Because nonprofits are not meant to pursue profits, they are more worthy of trust and are, therefore, more reliable providers of hard-to-measure outputs and impact (Hansmann, 1980; McLeod Grant, 2013b). Unfortunately for the nonprofit sector, the idea of trust is no longer the driving force behind those who control the purse strings. Government and foundation managers, as well as corporate social responsibility offices, are under increasing pressure to show results. This pressure trickles down to their nonprofit contractors to deliver measurable results, too.

The pressure that nonprofits now must be accountable for their decisions is producing many positive results, including real-time data reflecting the organizations' impact. But measuring, evaluating, and demonstrating results effectively costs money in a sector that is already hard-pressed to implement programs and services. In addition,

> Accountability expectations often fail to acknowledge the multiple meanings that accountability can have and the multiple stakeholders whose accountability demands nonprofits must accommodate. The risk is great, therefore, that the measures most readily at hand, or those most responsive to the market test, will substitute for those most germane to the problems being addressed. (Salamon, 2012, p. 33)

Additionally, many legacy nonprofits lose their effectiveness through mission drift. In search of new funding, pursuing the latest, coolest, most exciting idea, and refusing to cut programs no longer having an impact, legacy nonprofits lose clarity on the fundamental problem they are trying to solve or which of their programs actually work (McLeod Grant, 2013b).

The technology challenge. Today's society demands that organizations be creative, stimulating, and up to date in the realm of technology. An organization is judged based on the first impression it gives through its online presence in websites, videos, and social media. The

first impression is key because the average American does not stay on any given web page long enough to absorb the details of the social services a nonprofit supplies or the impact it is making in local communities. Like measuring for accountability, technology costs money and resources that many nonprofits struggle to find and that donors are hesitant to provide. "Information technologies are resource intensive. They entail significant purchase costs, require significant training and upkeep, and yet become obsolete quickly" (Blau, 2010, p. 10).

"The challenges posed by technology go far beyond financial or competitive considerations. Also, at stake are fundamental philosophical issues that go to the heart of the nonprofit sector's mission and modes of operation. Indeed, technology has been one of the doors through which the commercial impulse has entered the nonprofit sector in a major way" (Salamon, 2012, p. 34). Legacy nonprofits are struggling to innovate and determine how to offer services and programming online. But modern technology raises fundamental questions of ethics, aesthetics, creative control, and personal and intellectual property rights.

The legitimacy challenge. Numerous arguments have been made that threaten the legitimacy of the nonprofit sector. First, a serious break seems to have opened in the foundation of public trust on which the nonprofit structure is built. "This may be due in part to the unrealistic expectations that the public has of these institutions, expectations that the charitable sector ironically counts on and encourages" (Salamon, 2012, p. 34).

Second is the argument by conservative politicians and media that nonprofits have become just another special interest, colluding with government officials to increase public spending to fill their own purses. In 1996, the Heritage Foundation founder and president Edwin Feulner (1996) criticized charities for urging Congress to expand social welfare spending while themselves "feeding at the public trough" (para. 9). In many cases, the missions and goals for

which nonprofits exist have been questioned. "Nonprofits thus stand accused not only of being ineffective but also of preferring not to solve the problems they are purportedly addressing" (Salamon, 2012, p. 35).

Third is a persistent belief that the continued existence of social problems such as crime, poverty, teenage pregnancy, environmental degradation, disease, and many other problems is evidence of nonprofits simply not working effectively, despite validated fact-based research proving otherwise. "The resulting open season on government social programs has caught significant components of the nonprofit sector in the crossfire, particularly since the sector has been involved in administering many of the discredited efforts" (Salamon, 2012, p. 35).

Fourth are critics who complain that nonprofits have become too professional and are thus losing touch with those they exist to serve. Most recently, some on the left have complained that nonprofits have redefined basic human needs as challenges only professionals can resolve, therefore alienating family and friends who traditionally have helped in times of crisis. In other words, nonprofits are destroying community rather than building it. On the right, critics complain that the professionalization of the nonprofit sector inflates the cost of solutions that are just as effective without the added costs that go along with creating a more professional nonprofit (Salamon, 2012).

Finally, nonprofits many times lack meaningful bases for showing their value, adding further complication. Regina Herzlinger (1996) wrote "Unlike publicly traded companies, the performance of nonprofits and governments is shrouded behind a veil of secrecy that is lifted only when blatant disasters occur" (para. 4). She goes on to state that nonprofits lack the same accountability mechanisms of business: the self-interest of owners, competition, and the ultimate

bottom-line measure of profitability. Even staunch advocates of the sector call for more accountability and responsibility from nonprofit organizations.

The human resource challenge. It should come as no surprise that nonprofits have increasing challenges hiring and keeping qualified staff. Increasing demands for salaries, benefits, and safety measures are particularly tough. Of special concern is the turnover at the CEO and EDlevel. These leaders come into the nonprofit field to pursue the missions of their nonprofit organization and find themselves in need of skills as entrepreneurs, change leaders, strategic planners, fundraisers, and program engineers. And, they must do all of this in the current environment of growing distrust and public wariness of the social sector in general (Salamon, 2012).

Thomas J. Tierney (2006) writes about research on nonprofit leaders conducted by The Bridgespan Group describing a future deficit in nonprofit leaders if steps to prevent such a crisis do not happen.

> The projected leadership deficit results from both constrained supply and increasing demand. The key factors include the growing number of nonprofit organizations, the retirement of managers from the vast baby-boomer generation, movement of existing nonprofit managers into different roles within or outside the sector, and the growth in the size of nonprofits. (Tierney, 2006, p. 2)

Geoffrey Canada, President and CEO of the Harlem Children's Zone, responded to The Bridgespan Group's investigation by stating,

> As a person who cares passionately about this field, I think that this report is sobering and downright scary. It is difficult enough to find high-quality management and leadership in

the field today. It's very troubling to think about what will happen over the course of the next ten years if nothing changes. (Canada, 2006, p. 6)

Legacy nonprofits have added challenges in the human resources area due to the siloed structures that can build up over time and reduce an organization's flexibility. This can be because of "staff who have been in the same roles for many years, cultures that perpetuate themselves, and layer upon layer of administration, systems, and processes designed around personalities and old habits rather than current strategic needs" (McLeod Grant, 2013a, para 7).

Building on Salamon's (2012) writings, Kearns (2012) outlines a summary of essential questions about accountability for nonprofits. A review of table 2.1 "reveals that the four ideologies push and pull the nonprofit sector toward particular conceptions of accountability, not all of which are perfectly compatible" (Kearns, 2012, p. 602).

Table 2.1

Nonprofit Organization Accountability

	Voluntarism	**Professionalism**	**Commercialism**	**Civic Activism**
To whom are nonprofits accountable (stakeholders)?	• Value based communities such as advocacy groups or religious groups • Volunteers • Individual donors and members	• Professional staff • Professional associations • Clients • Industry groups • Government funders and institutional donors	• The marketplace • Strategic partners and investors, venture philanthropists, social entrepreneurs • Clients and beneficiaries	• Citizens, volunteers, and supporters • Coalitions and partner organization • Beneficiaries of nonprofit's mission
What are nonprofits accountable for (performance	• Providing a vehicle for the expression of values in the social sphere	• Accomplishing the mission via theory-based services and logic models	• Growing the organization's market share, sales, vouchers, and financial	• Changing the allocation of valued goods in society and the rules

expectations of stakeholders)?	• Embracing value-based explanations of social problems and issues • Transforming the lives of individuals in the short term through material assistance or values counseling, and in the long term through personal transformation and self-help • Proving a way to reduce the role of government in the lives of people	• Results and outcomes that are empirically validated • Continuous organizational learning and improvement • Meeting professional guild standards of individual performance • Meeting industry standards of organizational performance Meeting standards of good governance, efficiency, ethical management	sustainability; leveraging external investments; generation of community wealth • Social return on investment • Exploitation of niche markets and leveraging the comparative advantage • Accountable for spawning the entrepreneurial culture through replication, franchising, or other growth strategy	by which those goods are allocated
What are the challenges to effective accountability	• "Soft" data on outcomes that are based on anecdotes of individuals who have been transformed by their encounter with the nonprofit • Concerns about government and donor support	• Replication of professional and industry standards across many organizations, which may stymie innovation, lead to organizational isomorphism, and push toward short-term results and away from long-term advocacy and social change	• Market incentives and partners, possibly leading to mission drift and loss of nonprofit's distinctiveness	• Holding people and organizations accountable in informal, consensual, and networked-based structures

Note. Used with permission from "Accountability in The Nonprofit Sector," by Kevin P. Kearns, 2012, in Salamon, L. (Ed.) *The State of Nonprofit America,* p. 605.

The outline of accountabilities in Table 2.1 is relevant to the subject being presented in this dissertation because it clearly reflects the immense complexity that exists within nonprofit organizations. Additionally, being an iconic nonprofit multiplies the complexity due to the history and increased numbers of stakeholders. Being a CEO in a legacy nonprofit organization translates to being accountable for all of it, as all accountabilities will eventually roll up to the single leader at the top.

Nonprofit Leadership

Despite the importance of the nonprofit sector in the United States, the literature concentrating on leadership in the sector is diminutive (Kearnset al., 2015). Changes in the environment such as increased competition from the public and private sectors and a demand to become more "professional," have put added pressure on nonprofit leaders. In today's nonprofit, a CEO must be a leader who can do more than simply manage the organization. Because of the maturation of the sector, a nonprofit leader needs to be business-minded and technical, in addition to having the traditional qualities of vision, strategy, and dedication to the mission (Jiang, 2008).

In a typical nonprofit, the CEO role is one of singular importance (Drucker, 1990; Heimovics & Herman, 1989; Menefee, 1997; Phipps & Burbach, 2010). Particularly in small- to medium-sized nonprofits, the CEO is involved in practically every decision made in the organization including, but not limited to, strategic planning, personnel, programming, training, and fundraising (Dargie, 1998; Riggio & Orr, 2004). Additionally, many nonprofit CEOs have direct influence on the governance of the organization through their formal position on the board of directors and their relationship with the chair of the board and other board members (Heimovics & Herman, 1989; Herman & Renz, 1998). In other words, nonprofit CEOs and EDs

hold within their hands an enormous responsibility and extraordinary authority for insuring success of the organization (Herman & Heimovics, 1990).

Much of the research around rebranding, innovation, and relevance in non-profits quite naturally leads to the study of leadership, and what type of leadership is best for organizations seeking change. According to Peter Drucker (1994), organizations characterized by deeply embedded leadership practices and organizational values risk success because they can stop questioning the need to change and respond to the external environment. More specifically, much of the research, quite naturally, examines transformational leadership as a model for change within nonprofit organizations.

In their seminal study, Heimovics and Herman (1989) conclude, "All major actors in nonprofit organizations believe the CEO is the central causal agent for outcomes in nonprofit organizations" (p. 308). They go on to describe the skills they believe to be most important for successful nonprofit CEOs such as human resource development, environmental analysis and organizational change, organizational control and productivity, and strategy formulation.

Kearnset al.'s (2015) study suggests that "leaders of typical nonprofits utilize a lot of skills that can readily be taught, and some that can only be acquired and learned through experience" (p. 723). Using grounded theory methodology, the study finds nonprofit CEOs seem to rely on all of the skills outlined in the Heimovics and Herman conclusions (1989). Additionally, the study by Kearns et al. (2015) also "suggests that a rich and diverse set of interpersonal and conceptual skills may underlie many of the formal leadership roles and functions of nonprofit CEOs, especially skills involving communication, mediation, and trust building" (p. 724).

In attempting to determine leadership behaviors, characteristics, or effects that are most conducive to success in a nonprofit environment, Taylor, Cornelius, and Colvin (2014) found that "visionary leadership has a positive effect on perceived organizational effectiveness in the nonprofit setting….Participation and openness, innovation and adaptation, commitment and moral, external support and growth, and direction and clarity are each positively correlated with a leader's visionary actions" (p. 576). Their research supports nonprofit leaders developing more creativity, innovation, and adaptation when implementing change around their diverse funding sources, client needs and services, and government accountability. Executive Directors in this study enhance their organization's success by being both internally and externally focused simultaneously.

"As the environment within which organizations act continues to change and becomes increasingly competitive, maintaining an organizational climate that supports change and encourages creativity is a key objective for organizational leaders" (Allen, Smith, & Da Silva, 2013, p. 23). In their study, Allen et al. (2013) confirm the connection between leadership style and members' attitudes for organizational change readiness and creativity.

In her 2004 study, Jaskyte conducted an exploratory study of transformational leadership, organizational culture, and organizational innovativeness with the Associations of Retarded Persons. Her findings suggest that examining the link between leadership and organizational culture is important for understanding how leadership and innovation are related, and supply empirical support for the links between leadership, organizational culture, and innovativeness. However, her results show that transformational leadership may not be related to organizational innovativeness (Jaskyte, 2004).

Santora and Sarros' (1996) case study research implies that during difficult and instable periods, leadership is critical, drives the organization, and is a fundamental and vital element for organizational development and durability. They go on to recommend that leaders begin to challenge followers to assume their own brand of organizational leadership, thus further strengthening durability of the organization.

Several studies authored by CompassPoint Nonprofit Services with different partners look at the challenges the nonprofit sector faces in supporting and keeping qualified leaders. *Leadership Lost: A Study of Executive Director Tenure and Experience* was the first completed in 1999, then added to in 2001 with *Daring to Lead: Nonprofit Executive Directors and Their Work Experience*. This study was the start of shedding a clearer light on the vulnerability existing in the social sector by undervaluing their leaders and planned transitions. In 2006, a follow-up study, *Daring to Lead*, added much more profundity to the earlier study. Two thousand nonprofit executive directors in eight cities were surveyed. Results showed several findings relevant to how nonprofits can intentionally build leaderful organizations:

- Three quarters of survey respondents— xactly the same percentage reported in *Daring to Lead* in 2001—plan to leave their jobs within the next five years; 9% were already in the process of leaving.
- Negative perception of the board of directors is strongly associated with ED turnover. Although a majority (65%) of executives feel personally supported by their boards, most do not appear to be experiencing a strong strategic partnership. Fewer than one in three executives agree strongly that their board challenges them to be more effective. An overwhelming number of executive directors (73%) identified fundraising as the most desired area of board improvement.

- About a third of respondents were dissatisfied with their compensation, although executives who plan to leave within a year were nearly twice as likely to be dissatisfied as those who plan to stay longer.
- Ninety percent of executives are accessing professional development of some kind. Nearly one in five have enrolled in a nonprofit management degree or certificate program. A quarter of respondents said they had used an executive coach; 8% said they currently had a paid executive coach.

Data from this study raised several points of concern. Many small and mid-sized nonprofits lack the staffing depth to develop leaders inside the organization; only half of EDs say they are actively developing a future ED. Racial and ethnic minorities are a rapidly growing segment of the population, but EDs are overwhelmingly (82%) White. Younger executives were just as likely to be white as their older colleagues, and newly hired executives were only slightly more likely to be people of color than the overall sample (Bell, Moyers, & Wolfred, 2006, p. 3).

The 2008 *Ready to Lead?* Report offers more insights into the nonprofit sector's leadership challenges, including:

- The long hours and compromised personal lives associated with executive leadership are significant deterrents to pursuing top positions.
- Nonprofit salaries and actual or perceived insufficient life-long earning potential are barriers to executive leadership: 69% of respondents feel underpaid in their current positions and 64% reported that they have financial concerns about committing to a career in the nonprofit sector.
- Lack of mentorship and support from incumbent executives in helping to pave a career path are serious frustrations for many next generation leaders: only 4% of respondents are

explicitly being developed to become their organization's ED. Women are being developed at a lower rate than men.

- Inherent nonprofit structural limitations and obscure avenues to career advancement are obstacles to leadership opportunities inside organizations.
- The prevailing ED job description is unappealing to many next generation leaders. (Cornelius, Corvington, & Ruesga, 2008, p. 4)

The most recent report of *Daring to Lead 2011: A National Study of Nonprofit Executive Leadership* outlines three main findings:

- Though slowed by the recession, projected rates of executive turnover remain high and many boards of directors are underprepared to select and support new leaders.
- The recession has amplified the chronic financial instability of many organizations, causing heightened anxiety and increased frustration with unsustainable models.
- Despite the profound challenges of the role, nonprofit executives stay energized and resolved. (Cornelius, Moyers, & Bell, 2011, p. 2-9)

The CompassPoint research is important to consider because it reflects, over the course of many years, the trends in nonprofit leadership that have stayed the same, such as executive turnover, financial instability, and limited support mechanisms for growth of the organization and staff. These trends continue to negatively affect the social sector in many unseen ways.

The process of building, growing, and innovating within a nonprofit is filled with options from which nonprofit CEOs can choose. But every possibility that exists is filled with a balance of opportunities and challenges. Any interpretation of the future of nonprofit America in the face of these inclinations should be looked at in three parts, "focusing first on these challenges and opportunities and the extent to which they support or retard these impulses, then examining how

the sector's leaders have responded, and finally assessing the consequences of these responses both for individual organizations and subsectors and for nonprofit America as a whole. Only then will it be possible to suggest what alternative options might be worth considering to achieve a more appropriate balance than seems to be emerging among the impulses at play" (Salamon, 2012, p. 20).

In the second half of this literature review I assess how the environment has changed for the nonprofit sector in the United States, and present the research on ways and methods nonprofits and their leaders implement change and rebranding options to increase relevance in today's social sector.

Nonprofit Change

> In his book, *It Worked for Me: In Life and Leadership*, Colin Powell (2012) writes,
>
> Major change only works when followers realize your change has made their lives better and improved their productivity and performance. You only know you've succeeded in implementing change when your followers believe in the change and will pass their belief on to the next generation of followers. Real change must outlive the change agents. (p. 153–154)

One of the most famous military and government leaders of our time, Colin Powell's statement is applicable and relevant to implementing change in the social sector, too. While Powell was referring to his followers being fellow soldiers, the challenge for the social sector of bringing along affiliates, members, donors, and other nonprofit followers is like his stated sentiment.

Most people agree the nonprofit sector requires a specific set of strategies, directional initiatives, procedures, policies, ideas, and concepts, different and distinct from the for-profit and government sectors. Today's nonprofit CEOs and Executive Directors are charged with starting

the transformation of their organization to meet the needs of their stakeholders with a modern, relevant approach (DiCarlo, 2016). However, while we can all agree that change is necessary for legacy nonprofits to survive and thrive, the fact still is that many people really do not like change. Yet, change and implementing progressive decisions is one of the most vital responsibilities of a nonprofit CEO. As a leader, embracing and accepting change, and becoming a change agent is key to organizational success (Maxwell, 2007). Important to any nonprofit change process is that it be driven by a clear definition of how it moves the organization towards fulfilling the mission and purpose of the organization (Autry, 2001).

In her work as a consultant with legacy nonprofits, Heather McLeod Grant (2013b) outlines five points about the process of transformation to achieve greater impact at scale:

1. Diagnose the organization or network holistically. The process should begin with a holistic diagnosis: which pieces of the organization and/or network are most in need of fixing? Is the group still having impact, and is its impact still relevant? How could that impact be expanded or updated? How is its organizational health: its structure, its leadership, its talent, and its governance model? How healthy is its business model? And what about its brand—is it current and relevant, or does it reflect an outdated vision from decades past?
2. Identify a new vision and strategy for impact. Many nonprofits still have a north star within them, but the light has diminished over time, covered over by layers of lower-impact activities. Finding that light takes an ability to both reconnect with historic purpose and reimagine the organization potential in the current era. Sometimes the light is distributed across “bright spots” within the organization’s network: small examples of programs and approaches that are working well but aren’t yet widespread. That light can

then be used to identify what it will take for the organization to move from here to there and devise a change strategy for making the journey.

3. Realign the organization around the strategy. Once the strategy is set, the nonprofit then needs to assess its organizational capabilities and fix what is broken or missing. This can include redesigning the relationship of national headquarters with its field or affiliates, restructuring at the top, hiring new talent, building new capabilities, or even changing the governance model. The list will vary from organization to organization. No matter what, focus on the highest-priority items and develop a roadmap that phases the work over several years rather than trying to change everything at once.
4. Design a system-wide change process. You have to include representative parts of the system in the process to see points of connection, identify pain points, and create buy-in for proposed changes. Change can't always be mandated, so broad stakeholder engagement and bottom-up input is critical, such as from local affiliates and end beneficiaries. This is especially true for federated groups and membership organizations. As with all change processes, the leader should plan for quick wins and sequence adoption in "waves" throughout the organization. If the nonprofit is a large, decentralized network (a federated model) the group needs to figure out whether to cascade the change out from headquarters to the affiliates versus horizontally, with some affiliates acting as early adopters and influencing others.
5. Lead, communicate, and engage. Change is hard, and given the chance, most stakeholders will slip back into the comfortable status quo. Leadership of this process is critical and should come from many places. The CEO has to keep the organization focused on why they are doing this and create the hunger to make real changes. The

> board should also champion and communicate the why and the how. And leaders of affiliates should enroll and engage their local constituencies. Leadership at all levels of the system is important, as is constant communication and engagement. In fact, where we've seen this approach fail is when there is lack of concerted, aligned, shared, and sustained leadership for change at the board, executive, and affiliate levels. (McLeod Grant, 2013b, para. 3–7)

More than 10% of today's population works in the nonprofit sector, compared to less than one percent in the 1900s (Kunreuther, Blain, & Fellner, 2004; McKeever & Gaddy, 2016). The number of nonprofit organizations in this country has grown from 793,000 in 1982 to over 1.5 million in 2016 (Kunreuther & Corvington, 2007; McKeever, 2019;). As the sector grows, donor competition has intensified and the search for government and private funding has escalated.

According to Kunreuther and Corvington (2007) the government has shifted much of its responsibility to nonprofit organizations. With the government continually reducing its spending on social programs, the American population has become more reliant on the nonprofit sector's services. In 2010, 4.75% of GDP was spent on social programs in the United States. In 2020, it is predicted that sum will be closer to 2% GDP (Chantrill, 2018). These numbers mean nonprofits are simply being asked to do more with less, necessitating them to operate more efficiently. There has been more importance placed on "accountability, effectiveness, and results-based outcomes, additionally stressing nonprofit operations" (Kunreuther & Corvington, 2007, p. 4).

Young, Salamon, and Grinsfelder (2012) describe the "marketization" of the nonprofit sector or an embrace of commercialization never seen in nonprofit operations and strategy.

These changes reflect the maturing of the nonprofit sector from its grassroots beginnings to a more professional, formalized industry, thus creating a new model for the nonprofit sector much different from the place from where today's legacy nonprofits originally came.

Successful nonprofits today have embraced changes in the sector. Jiang (2008) states, "Due to the rapid growth and increasing demand for its services, nonprofit organizations are feeling more pressure to stay relevant and accept the competitive environment" (p. 7). Changing nonprofits are looking at partnerships in new ways, including developing closer relationships with the corporate world. These interdependent relationships help the private sector by enhancing their public image and supplying sources of previously untapped markets. Nonprofits benefit from corporate donations, sponsored events, and new insights, energy, and creativity. Other significant changes include the incorporation of the market culture. More time is being spent developing ways to define their niche and differentiate themselves from their competition. By being more strategic, a nonprofit can become more data-driven, effective, and accountable. And through modern technologies, their performance can, and must, become more transparent in today's world of nonprofit success. As Jiang (2008) summarizes in Table 2.2, nonprofits have changed significantly over last few decades. And with these changes, nonprofit leaders must be prepared to change, too.

Table 2.2

Comparison of Old Versus New Model of Nonprofits

	Old Model	**New Model**
Inbound Logistics (input)	• Heavily government supported • Mainly fundraising	• Growth in fee-income services • Corporate partnerships
Operations/Work	• Grassroots operations, Activism	• Greater engagement with market systems (commercialization of nonprofit sector

		• Nonprofit and for-profit lines blurred
Outbound Logistics (output)	• Limited measurement • Anecdotal	• Expectations of measurement and metrics • Heavily evaluative
Marketing and Sales	• Limited	• Marketing— branding and advertising more common • Differentiation/Developing market niches
Service offering	• Varies	• Varies but more "social purpose enterprises" and "social ventures"
Procurement/Partners	• Government and local communities	• Increased corporate involvement
Technology	• Limited	• More advanced, though still less compared to for-profit
Human Resource Management	• Primarily focused on hiring and minimal effort in training and development • Tenure-based promotions	• More structured, thoughtful • Larger organizations have systems in place and specific individuals devoted to hiring • Creation of professional development and capacity building • Performance-based hiring
Firm infrastructure (organizational structure, culture)	• Grassroots mentality, individual operations • Founders are still running organizations	• Engaged with other nonprofits and other sectors • Increased professionalism, entrepreneurial • More intricate organizational structure

Note. Used with permission from "The Nonprofit Sector: Examining the Paths and Pathways to Leadership Development," by Lisa Jiang, 2008, University of Pennsylvania, Philadelphia, PA, p. 9.

In the case of an iconic, legacy nonprofit, change must be implemented cautiously and carefully. The CEO must work to turn the ship without wrecking the entire boat. Viewing change through the lens of tradition can allow a leader to determine whether any reform effort is actually needed. And, most importantly, the CEO can take steps to understand the impact of a change initiative on the organization's mission and core programs. In their work and research

with nonprofit organizations, Salipante and Golden-Biddle (1995) portray the influence of change as a meeting of two ideas: "(1) *environmental challenge*, or to what extent does the environmental shift challenge the established mission and core expertise of the organization? And (2) *altered view of the organizational identity,* or to what extent do leadership's responses alter the public's and patrons' (for example, customers' and donors') views of the organization's identity?" (p. 11). The larger the challenge to each of these ideas, the more basic the change and the need to alter the organization's core. Likewise, the smaller the challenge, the more incremental the type of change needed. They go on to describe their belief that organizational decline rather than success is likely to be the result of a nonprofit moving away from its traditional core competencies and restructuring, due to the erosion of reliable performance and established accountability procedures. At the end of the day, Salipante and Golden-Biddle (1995) agree with some other organizational ecologists that nonprofit leaders should consider the importance of tradition, history, and continuity.

In my review of the literature I found many accounts with the predominant, generalized belief that organizations become petrified with age. Whether emphasizing accountability and apathy (Hannan & Freeman, 1984), concerns with legitimacy (DiMaggio & Powell, 1983), or learning traps and technological lock-in (Christensen, 1997), the overall view in the literature is that organizations become more conservative as they age and grow. However, one might argue that nonprofits or mission-driven organizations may be better able to try out changes if they are older and have the necessary resources available. In research on national women's and racial minority organizations, Minkoff (1999) determined that older organizations are more likely to make changes in their strategy. Additionally, there is no support showing older organizations are more apt to make changes toward a more conservative service area such as from protest or

advocacy to supplying a service. Overall, legacy nonprofits may be more stable and less likely to fail (Minkoff & Powell, 2006). "Larger, more established nonprofits that are more professionalized are most likely to be able to undertake significant modifications in strategy and activities and to withstand the disruptive effects of organizational change" (Minkoff & Powell, 2006, p. 608).

Nonprofit Rebranding

"Several challenges exist in NPO [nonprofit organization] branding, beginning with the understanding of the brand concept by NPO leaders" (Keller, Dato-on, & Shaw, 2010, p. 107). Hankinson (2001) agrees that nonprofit leaders perceive brand as a simple visual image rather than the identity of the whole organization.

In more recent literature, the subject of nonprofit branding is being written about in academic and practitioner journals and books with increasing frequency. However, some of the literature reflects a growing concern about a potential over-commercialization of the social sector and the use of techniques from the for-profit sector. Literature supports nonprofits being values-based organizations and explicitly differentiates the sector through its unique set of charitable qualities as compared to the private sector. Given the significance of values and mission in the social sector, Stride (2006) argues that we need to clearly understand how values are brought in to nonprofit branding in order to understand if there is truly a need to rebrand in the organization's context. A nonprofit brand should reinforce its values and facilitate the building of trust for the organization and its mission (Tapp, 1996). As discussed in sections above, trust is considered to be particularly important in the nonprofit context (Sargeant & Lee, 2002), and plays a specific role in a nonprofit's ability to garner donations (Burnett, 1992) by providing

assurance that funds are being used for the purpose intended by the donor (Ritchie, Swami, & Weinberg, 1999).

Most will agree that many legacy nonprofit organizations need new models that allow their brands to reflect a contribution to sustaining their social impact, serving their mission, and staying true to their organization's values and culture. Kylander and Stone (2012) show in their research there is a growing paradigm with brands that have an increasing role in a nonprofit organization's performance, internally reflecting the purposes, methods, and values of the nonprofit itself. "Increasingly, branding is a matter for the entire nonprofit executive team. At every step in an organization's strategy and at each juncture in its theory of change, a strong brand is increasingly seen as critical in helping to build operational capacity, galvanize support, and maintain focus on the social mission" (Kylander & Stone, 2012, p. 38).

However, while Kylander and Stone (2012) write that branding is to be led by the entire executive team, they also go on to explain that brand management is "sometimes seen as a top-down shortcut to avoid a participatory strategic planning process—an effort by top management to impose greater conformity in goals and priorities" (Kylander & Stone, 2012, p. 39). As I can personally attest, rebranding is usually staffed out of the marketing department and organized with less participation than strategic planning. Therefore, the new brand might feel imposed upon the organization by those on the top. Concerns from stakeholders can be especially great when a new CEO starts a rebranding campaign as part of an effort to lead change within the organization (Kylander & Stone, 2012).

The implementation of branding practices and marketing direction by nonprofit organizations is supported by many authors as a method of success during challenging times (Gainer & Padanyi, 2005; Hall, 2006; MacMillan, Money, Money, & Downing, 2005; Mottner &

Ford, 2005). Specifically, branding and rebranding receive a lot of consideration in the marketing and nonprofit literature (e.g., Becker-Olsen & Hill, 2006; Chiagouris, 2005; Hankinson, 2001; Laidler-Kylander, Quelch, & Simonin, 2007; Napoli, 2006). Bennett and Sargeant (2005) outline four specific reasons why nonprofit organizations need to maintain a high-quality, well-known brand: (1) donors expect a professional approach to brand management throughout fundraising nonprofit organizations (Saxton, 1994; Tapp, 1996); (2) exceptional nonprofit brand and image is a predictor of donated revenue (Kennedy, 1998; Tapp, 1996); (3) distinguished branding influences consumer preference for nonprofit-branded products and services (Tapp, 1996); and (4) brands with esteemed reputations can rapidly produce a response for donation requests (Van Riel, 1995).

Nonprofit branding is essential to the survival of any organization that depends on donations and outside fundraising. "Your brand is what remains after your marketing efforts have come and gone. Marketing can convince someone to give you a donation; branding will determine whether or not that person becomes a donor for life" (Kubicek, 2016, para. 5). A nonprofit can have any number of reasons for rebranding, some more vital than others.

Robin Ganzert, who serves as President and CEO for American Humane, faced a formidable challenge in refreshing and renewing a 139-year-old nonprofit brand in recent years. Ganzert (2017) writes, based on her own experience, "Successful rebranding begins with the often-difficult process of conducting a thorough self-assessment. This means doing your research and taking a cold, hard look at how others perceive your brand and where you stand right now" (para. 5). Ganzert describes how the values of American Humane had evolved but their branding had failed to keep up. She then recommends,

> You must also take a frank look at how your nonprofit stacks up against the competition.…A clear understanding of your position in the marketplace is essential in developing a competitive branding strategy that helps your nonprofit cut through the noise. (para. 8)

Finally, Ganzert goes on the state,

> The efficacy of your rebranding depends on your willingness to reflect on both where your nonprofit has been and where you want it to go. In other words, you must have a clear understanding of who you are and the unique value your nonprofit offers. (para. 10)

Ganzert's experience in leading a rebranding effort for an iconic non-profit is like others such as Y-USA, YWCA, and the Muscular Dystrophy Association. While many people already know of these organizations, all three iconic, long-standing nonprofits chose to rebrand and reintroduce themselves recently. All three organizations expressed a need to rebrand to keep up with the times and introduce themselves to audiences who did not understand how their mission had evolved (Segedin, 2016).

Sarah Durham (2010), author of *Brandraising: How Nonprofits Raise Visibility and Money Through Smart Communications,* wrote,

> For most nonprofits, raising money and increasing visibility are the primary reasons to communicate. Brandraising is the process of developing a clear, cohesive organizational identity and communications system that supports these goals and makes it easier to express the organization's mission effectively and consistently. (p. 4)

As the owner of Big Duck Smart Communications for Nonprofits, Durham's insights in nonprofit rebranding are highly sought after. Her bottom line is: "Updating your brand can have

a very positive organization-wide impact, that spills over into everything you do" (Perry, 2017, para. 36).

These examples are only a few of the nonprofit organizations that have decided to rebrand to build relevance and innovate. Innovation, rebranding, and building relevance are all about growing the donor base for a nonprofit. "We conducted this survey, working with a market research firm, that's sort of a quantified look at what happens to nonprofits when they rebrand—what do they change, does it impact fundraising, does it impact recruitment into programs, all of that stuff," said Durham. "One of the most interesting things we found in that study was that a lot of nonprofits had rebranded fairly recently, but those that had rebranded two years ago or more were seeing a sizeable shift in their ability to raise money. We saw that more than 50 percent of nonprofits that rebrand report that they've seen an increase in their revenue. …. That's a very high number, especially compared to only 4 percent who say they've seen a decrease in revenue" (Norris, 2015, para. 9). At the end of the day, the ability to bring in funding is, at the most basic level, survival for nonprofits. At a higher level, secure funding is about being able to develop innovative programs, influence policy, and create impact in your mission area.

"For a brand to really live and grow, it has to be owned at some level by everyone who represents it. The challenge is to turn brand strategy into something meaningful for the majority of a charity's own people" (Grounds, 2005, p. 65). This aspect of rebranding is unique to nonprofits. To create a brand that is truly meaningful for the majority of a nonprofit's stakeholders will be filled with challenges and angst. Nonprofits are, historically, filled with enormous amounts of passion and too little money. And the passionate stakeholders all have strong opinions about the brand, particularly if it is a part of their identity.

Schloderer, Sarstedt, and Ringle (2014) researched the impact of reputation on a person's willingness to donate money or volunteer time to nonprofit organizations. Their study considered six criteria that are potentially affected by branding: attractiveness, competence, likeability, OSR (organizational social responsibility), performance, and quality. Overall, their "results show that successful reputation management is specifically important for male, older, highly educated, and affluent respondents. Communicational measures aimed at strengthening an organization's social responsibility are particularly promising regarding triggering favorable donor behavior and voluntary support" (Schlodereret al., 2014, p. 110).

Stebbins and Hartman (2013) note from their study that even smaller, local nonprofit organizations can benefit from distinctive brand personalities. Results from their study of five nonprofit organizations found that "brand personality traits that are both differentiating and relevant to donors influence charitable giving" (p. 203). Their 2013 study on the brand traits that attract donors to smaller nonprofits supplies suggestions and advice to practitioners working on nonprofit branding.

> Brand managers can start by defining which traits of emotional engagement (exciting, fun, heroic, and inspiring); voice (ambitious, authoritative, and bold); or progression (empowering, pioneering, and transforming) most closely align with the organization's mission and identity.…Once the brand personality is clearly defined, the organization should be focused on delivering that message at every touch point with the public. (p. 213–214)

While the association between brand and fundraising is clear, nonprofits have several goals to consider. One, they need to satisfy the need to respect issues about how the organizational mission is communicated and the potential need to re-educate the stakeholders.

Two, at the heart of any nonprofit brand should live the nonprofit's beliefs and values. And three, nonprofit deficiencies in brand management exist fully in brand development and do not exist in brand maintenance (Tapp, 1996). "Most older charities have brands that are 'accidents of fate' in the sense that these brands have not been proactively managed, in many cases right up to the present day. Such charities should think about introducing the discipline of brand development, as well as brand maintenance" (Tapp, 1996, p. 336). Tapp's 1996 research also found that persons working in legacy nonprofits believed that their brand had "developed largely without proactive management but had been largely an 'accident' of circumstance" (p. 336).

Keller et al. (2010) review four significant factors in the building and supporting any nonprofit brand: brand orientation, brand value, brand communication, and brand management.

Brand orientation. "When an NPO accepts the fact that it is a brand to be managed, its leadership must find a way to embrace a brand orientation philosophy" (Keller et al., 2010). Hankinson (2001) explains this idea in depth, describing nonprofit brand orientation involving: (1) a comprehension of what a brand does and what it represents; (2) internal and external communication of the brand in a consistent manner; (3) strategic utilization of the brand as a valuable resource; and (4) active and purposeful management of the brand. A nonprofit organization that embraces a brand orientation can shift into the coveted space of relationship fundraising and make more progress toward an inclusive movement on the way to achieving its mission.

Brand values. Branding programs centered around a nonprofit's values allow for a nonprofit to be considered as a unique proposition, rather than just part of the larger whole of the social sector (Griffiths, 2005; Keller et al., 2010). Stride (2006) emphasizes that emphatic values are what distinguish a nonprofit from the private sector's for-profit organizations. "A brand

must embody the NPO's values to gain strength and differentiate itself among other organizations in the local community and larger national or global environment" (Keller et al., 2010, p. 108). Additionally, brand values should originate in the nonprofit organization's mission statement. Any nonprofit brand should reflect the mission statement, and not the founder or the funders. If an organization does not have a strong, consistent mission statement, it may be hard to show the brand values so important to operational success.

Brand management. "Having accepted the brand as an asset or resource to be managed, NPO leaders must develop organizational structure and strategy upon which to build and manage the brand" (Keller et al., 2010, p. 109). To manage a brand effectively within a nonprofit organization there should be clear guidelines and a coordinated strategy coming from the top of the nonprofit organizations, and distinct demarcation of brand responsibility via marketing and communication personnel (Keller et al., 2010).

Brand communication. Building a strong brand through communication is reflected in the organization's name, logo, slogans, taglines, social media, and other visual representations (Aaker, 1997; Naddaff, 2004; Smith, Graetz, & Westerbeek, 2006). Challenges can arise in keeping consistent brand messaging when the organization is made up of dispersed affiliates. It is still vitally important that unity exists throughout all levels of a nonprofit organization to ensure leaders effectively administer the brand.

In his 2004 article for *Communication World,* Naddaff outlines the five P's for nonprofit branding, stating, "Nonprofit organizations require a much softer sales touch than their business world counterparts, and finding that right approach can make branding difficult" (p. 20). The importance of each of the five P's lies in how they differ from the for-profit sector. When thinking about the brand of a nonprofit, it is the image and feeling of the organization that is

important. For nonprofits, it is this image and feeling that portrays and promotes the appeal of the cause and the reputation of the organization. It is important to fully clarify the five P's so that the nonprofit brand reflects the elements of the organization. This allows for the brand to create an urgency to donate and a sense of community around the nonprofit's mission.

Each of the five P's is valuable on its own. However, in bringing them together, they can strengthen the brand of a nonprofit exponentially. Specifically, clarifying an organization's *position* allows both the external and internal audiences to understand what the specific nonprofit works on that differentiates it from other similar organizations. *Permission* takes *position* one step further to understanding not only what makes the organization unique, but specifically what it stands for and believes in. *Permanence* is the understanding of the legacy of the organization and its work. The value of *permanence* is allowing stakeholders to understand their contribution is not short-lived but will remain longstanding with a sustainable impact. *Promise* also communicates to stakeholders that what is communicated is true and the organization can be counted on to follow through on what they have committed. Finally, the *personality* of the organization must shine through any brand. It is important a nonprofit's brand reflects how its *personality* is part of the mission and vision of the organization.

Throughout the literature reviewed in this study, we can see how brand is at the center of any nonprofit. Kylander and Stone (2012) describe it in a cyclical model, "brand is nested within organizational strategy, which in turn is nested within the mission and values of the organization. Brand plays a variety of roles that, when performed well, link together in a virtuous cycle. A well-aligned identity and image position the organization to build internal cohesion and trust with external constituents. Organizations can leverage these to strengthen internal capacity and

achieve impact in the world. The resulting reputation then enhances the identity and image of the brand with which the cycle began" (Kylander & Stone, 2012, p. 39-40).

Overall, there is general agreement from many researchers on a few points that indicate nonprofit branding is key to their success (Ewing & Napoli, 2005; Keller et al., 2010; Quelch & Laidler-Kylander, 2006; Quelch, Austin, & Laidler-Kylander, 2004; Venable, Rose, Bush, & Gilbert, 2005;). One, there are enormous potential results from using branding principles to nonprofit organizations. Second, branding is a unique and defining factor for success in today's challenging and competitive social sector environment. Finally, branding and rebranding strategies and processing are exceedingly difficult. In sum, what is important to gather from all the past research on nonprofit rebranding is the emphasis on how important and vital this type of repositioning is to the success of the organization, especially to iconic, legacy nonprofits.

Conclusion

There is not enough research done in the nonprofit sector or on nonprofit leadership overall (Bielefeld, 2006; Phipps & Burbach, 2010; Kearns et al., 2015). The lack of research on the social sector leaves nonprofit leaders with only the option of translating general leadership research to fit the nonprofit sector, or to simply move forward in an experimental manner not necessarily knowing what would work in their particular setting. Thus, more research is needed around nonprofit leadership, repositioning, and rebranding. "The nonprofit sector needs to develop its own research agenda and distribute findings to nonprofit managers. This process is in its infancy. Whereas research on the nonprofit sector has been vigorous over the last few decades, most of it has focused on giving and volunteering or on discovering and delineating the basic dimensions of the sector and (more recently) its relations with the other sectors. It is vitally

important that management practices in the nonprofit sector be based on sound, useful research on nonprofit organizations" (Bielefeld, 2006, p. 397-398).

Jim Collins (2006) suggests, in response to The Bridgespan Group's research on the deficit of nonprofit leaders, "an analysis of effective nonprofit leaders" (p. 8) asking questions such as "Why did some succeed and others not? What does this teach us about what separates those who become effective nonprofit leaders from those who do not? And how can those lessons best be deployed to create a vast army of effective nonprofit leaders?" (p. 8).

Much of the literature suggests nonprofit leaders understand the need for rebranding but differ in their marketing and branding strategy and brand management philosophy overall (Hankinson, 2001; Griffiths, 2005; Stride, 2006). By reviewing the existing literature on iconic nonprofits, nonprofit leaders, nonprofit change overall, and nonprofit rebranding specifically, it is clear case study research on top-level leaders of iconic, legacy nonprofits rebranding for renewed relevance sits within the larger domain of prior research. One, there is little case study research on nonprofit leaders of any type, and I could find none specifically on top-level (CEO and ED) leaders of legacy nonprofits. And, two, while the literature does support the need for rebranding in the case of older nonprofits, it does not refer to the CEOs and ED's who lead the initiative to rebrand and how they move through the changes. "Future studies should include the effects of deeply imbedded organizational cultures and management structure on brand development and the acceptance of brand management" (Keller et al., 2010, p. 118).

Understanding the process these iconic nonprofit leaders go through to create change and to rebrand for renewed relevance is extremely valuable to other leaders in similar roles. There are many valuable insights that can be learned from case study research in this subject area and valuable stories to be documented. Even considering the research cited in this chapter, I believe

the literature has not produced any research specific to top-level leaders of iconic non-profits rebranding for renewed relevance that is applicable to the practice or the scholarship. In the absence of such a study, I chose to use portraiture methodology and gather data through case studies of iconic nonprofit CEOs located in the United States. By bridging the two worlds of scholarship and reality, I present a study to support and help nonprofit executives bring renewed relevance to iconic nonprofits in the United States. Through writing and video recording, I have created portraits of nonprofit executives that capture the strength, intricacy, and breadth of the executive experience in their own contexts, ultimately sharing the point of view of the people who are living in those human, social, and cultural experiences. In the following chapter, portraiture methodology and the outline of its application for this research is presented.

Chapter III: Methodology

Portraiture is the method of research that brings together the art of creating a personal portrait of time and place, along with the science of writing research and inquiry. My interest in this methodology stemmed from my desire to provide research to an audience who could most use it, the nonprofit executive.

The portraiture methodology is full of paradoxes. Focusing on the motivations and purposes of portraiture, the researcher hopes to produce "both analytic rigor and human connection, both inquiry and intervention" (Lawrence-Lightfoot, 2005, p. 10). In his review of the portraiture methodology, Joseph Featherstone (1989) links the private stories being told to the public discourse that it hopes to affect. He claims the power of portraiture lies in how the method embraces both analytic rigor and community building. Featherstone refers to portraiture as the "people's scholarship" and a scholarship in which "scientific facts gathered in the field give voice to a people's experience" (p. 375).

In this chapter, I describe (a) the methodology of portraiture by briefly covering the history and background of portraiture, (b) the techniques and processes for portraiture research, (c) the research design for my dissertation, (d) the criteria for assessing trustworthiness of the research, and (e) how my practice study with Daniel Obst of AFS Intercultural Programs informed my research plan.

History and Background

The joining of art and science has a long history going back centuries. Dialogue and collaboration between artists and academics, novelists and scholars are nothing new in our time. "The intersection of fiction and social science has occurred since at least the eighteenth century, when these two approaches to the study of life began to emerge from similar impulses and

express common themes" (Lightfoot-Lawrence & Hoffman Davis, 1997, p. 5). As early as the 1700s, novelists and philosophers such as Samuel Johnson, Jean-Jacques Rousseau, and Denis Diderot sought to allow their readers to experience their work in terms of a unique view of the entire human experience and the world around them.

At the turn of the century, the American philosopher and psychologist William James (1904) stated his perception of what a younger generation was seeking in the balance between formality and reality:

> It is difficult not to notice a curious unrest in the philosophic atmosphere of the time, a loosening of old landmarks, a softening of oppositions, a mutual borrowing from one another on the part of the systems anciently closed, and an interest in new suggestions, however vague, as if the one thing sure were the inadequacy of the extant school-solutions. The dissatisfaction with these seems due for the most part to feeling that they are too abstract and academic. Life is confused and superabundant and what the younger generation appears to crave is more of the temperament of life in its philosophy, even tho it were at some cost of logical rigor of formal purity. (p. 52)

More recently, scholars such as W.E.B. DuBois have crossed the traditional social science boundaries. As the first African American to earn his doctorate from Harvard University in 1895, DuBois' work dynamically brought in science, history, art and activism throughout his many styles of writing (DuBois, 2020). Additionally, anthropologist Clifford Geertz (1973) compared his ethnographies to that of painting a portrait, writing, "The line between the mode of representation and substantive content is as undrawable in cultural analysis as it is in painting" (p. 16). Ultimately, as Sara Lawrence-Lightfoot came to design the portraiture methodology, she drew on these works to shape her own version of social science research with a basis in

"searching for what is good and healthy and assumes that the expression of goodness will always be laced with imperfections" (Lawrence-Lightfoot & Davis, 1997, p. 9). Joseph Featherstone (1989) describes Lawrence-Lightfoot's portraiture to be in the "spirit of James and DuBois" (p. 377), telling stories as a form of scholarship that moves close to art in its ability to "express complex truth and moral context in intelligible ways" (p. 377).

Lawrence-Lightfoot's expectation of the researcher is not to perform as a Pollyanna, but, primarily, to look for the positive rather than the sources of failure. She goes on to expand, stating, "the counterpoint and contradictions of strength and vulnerability, virtue and evil (and how people, cultures, and organizations negotiate those extremes in an effort to establish the precarious balance between them) are central to the expression of goodness" (Lawrence-Lightfoot & Davis, 1997, p. 9). In portraiture methodology, it is important to remember that it is not the researcher's definition of goodness being reflected in the portrait but that of the subject being drawn in the portrait. Yet, the researcher's interpretation of goodness is present all the same (Lawrence-Lightfoot & Davis, 1997).

Portraiture is framed by the traditions and values of the phenomenological paradigm and shares many of the techniques of ethnography (Hill, 2008). However, there are key differences between ethnography and portraiture methodologies. "Ethnographers listen *to* a story while portraitists listen *for* a story" (Lawrence-Lightfoot & Davis, 1997, p. 13). What is meant by the authors' statement is the portraitist looks to combine the empirical and the aesthetic in creating the portrait. The standard set for portraiture is authenticity rather than reliability and validity, while the methodology explicitly uses "the self as the primary research instrument for documenting and interpreting the perspectives and experiences of the people and the cultures being studied" (Lawrence-Lightfoot & Davis, 1997, p. 14). It is the human experience that a

portraitist looks to tell, or how behaviors, events, and actions are perceived, experienced, and negotiated by the people in the location. In other words, what meaning do people attach to the behaviors, events, and actions they see and experience (Lawrence-Lightfoot & Davis, 1997)? And, at the end of the day, a portraitist hopes that readers will see themselves reflected in the portrait and feel identified.

The tie between academic portraiture methodology and the art world is closer than one might imagine. In the art world portraiture is an incredibly old form that flourished before the invention of photography. Prior to the invention of cameras, a painted, sculpted, or drawn portrait was the only way to record the appearance of someone. "But portraits have always been more than just a record. They have been used to show the power, importance, virtue, beauty, wealth, taste, learning or other qualities of the sitter" (Tate Museum, n.d.). Like portraiture research, portraits from the art world have almost always been flattering. Today, photography is an important medium of traditional portraiture, making a formerly expensive product affordable for most people. Additionally, since the 1990s artists have also used video to create living portraits. The inclusion of video in my dissertation allowed me to represent and complement both the academic, a written portrait, with the arts, a visual portrait, that fully reflects the person studied.

Process and Product

Portraiture is made up of a process of developing and informing the portrait, as well as a product, the final portrait itself. It is vital that researcher-portraitists have thoroughly completed one layer before moving on to the next. While painting each layer of the portrait, the researcher-portraitist must make sure there is "an appropriate amount of medium to work up through the next layers—to ensure that this next layer [is] slightly more flexible than the one below"

(Newton, 2005, p. 83). In this section, I briefly review the various layers of portraiture methodology, the process and order in which each layer should be arranged, and the importance of each step in creating the final product.

Context. In the portraiture methodology, context is critical in providing evidence of the human experience and organizational culture. For a portraitist, context is the environment in which the story takes place, including the visual, social, physical, historical, and temporal. Context is the frame around the portrait and allows the reader to better understand what the subject does, feels, thinks, and says. For the researcher, the context supplies clues for understanding the behavior and perspective of the subject, as well allowing the subject to speak and interact more naturally and fully in known surroundings. The portraitist researcher must be prepared to remain open and flexible in documenting the reality being observed. "Whether she is coming to the setting with a well-developed, discrete hypothesis, or with a theoretical framework that she is testing and refining, or with a number of relatively informal hunches, the realities of the context force the consideration of earlier assumptions" (Lawrence-Lightfoot & Davis, 1997. p. 43). While similar to the work of phenomenologists, ethnographers, and other qualitative researchers, the portraitist makes intentional use of context in ways reflecting a focus on narrative development, visual expression, descriptive elements, and the inclusive perspective of the researcher in the setting.

In implementing the portraiture methodology, the researcher must join in a dance with two equally important facets of the procedure: data gathering and forming the ultimate portrait. The final product must be in the foreground throughout the entire process, as well as before and after interviewing the subject. Collecting and interpreting the data continues long after the interview and throughout the actual writing of any final product. "The requirements of the

product stimulate insights into the process; the direction of the process actively shapes the finished product" (Lawrence-Lightfoot & Davis, 1997, p. 60). Therefore, when strategically preparing to conduct portraiture research, it is necessary to rehearse the dance with process and product, repeatedly asking how the line of investigation gives shape to the portrait and how the mode of representation clarifies understanding.

Voice. The aspect of voice is used in portraiture both during field research and in creating the final portrait. The modalities of voice reveal varying levels of manifestation and visibility for the researcher in the final product, from a negligible place of witness all the way to a place of overt involvement. Either way, the researcher must intentionally determine how voice will play a role in the process and product. While the portraitist is always present, the intended voice should never overtake that of the subject. The intent of portraiture methodology is not a self-portrait.

> Voice speaks about stance and perspective, revealing the place from which the portraitist observes and records the action, reflecting her angle of vision, allowing her to perceive patterns and see the strange in the familiar. As the portraitist moves from thin to thick description, she uses the interpretive voice, which seeks meaning. The autobiography of the researcher (her history, experience, family background, and cultural origins) also informs and shapes the portraitist's voice, as do her intellectual interests, disciplinary background theoretical frames, and ideological preoccupations. Finally, voice refers to the presence of the portraitist's voice discerning the sound and meaning of the actors' voices and sometimes entering into dialogue with them. (Lawrence-Lightfoot & Davis, 1997, p. 105)

In portraiture, there exists a paradox with the voice of the portraitist. The researcher is both everywhere throughout the final product and, at the same time, is carefully placed throughout. The portraitist's voice is both central and peripheral throughout the process and the product (Lawrence-Lightfoot & Davis, 1997).

"Voice is important—how voice is expressed, how voice is informed, how our voice differs from the dominant voice" (Calmore, 1995, p. 320). The portraiture methodology recognizes the researcher's role in making meaning of the data, and in sculpting the story being told to the world. There is great responsibility in creating portraits, how the researcher tells the story and the information she or he chooses to tell. By including the portraitist's voice in the final product, the responsibility is overt, openly accepting and acknowledging to the reader the portrayal of "people's lives and the contexts influencing the choices they make" (Chapman, 2005, p. 48). The power that exists in voice should be acknowledged, carefully considered, and used judiciously to produce a truthful portrait.

Relationships. Relationships are at the heart of portraiture research. Any portrait is formed and created through the development of relationships. Portraiture research requires productive and benign relationships between the portraitists and the subjects throughout the process. Through navigating the channels of intimacy, trust, reciprocity, and boundary setting, a portraitist and the subject must develop a level of honesty, comfort, and transparency ensuring mutually agreeable and productive communication. In developing these vital relationships, a portraitist always seeks out the positive, looking for assets, buoyancy, innovation, and vision found in the subject being documented. By going into the research with this stance, a space is opened for vulnerabilities, weaknesses, and complex truths.

In her book *I've Known Rivers: Lives of Loss and Liberation,* Sara Lawrence-Lightfoot (1994) states, "I understand and honor the storyteller's judgement about who and what needs to be protected from scrutiny and exposure. Very occasionally, I even choose to edit out those parts of stories that would seem potentially damaging or hurtful even though they have been offered freely and spontaneously" (p. 612). As a portraitist searches for goodness, the journey is entrenched with empathy for the subject while negotiating conflicting demands in the areas of ethics, empiricism, and emotion. In portraiture, the researcher tries to see through the subject's eyes and understand his or her point of view. By trying to understand the subject's perspective, empathy grows leading to increased trust, understanding, and a more intimate relationship. However, as the relationship gains strength, the portraitist must be consistently vigilant about necessary boundaries keeping focus on the research. These boundaries must be constantly navigated as the portraitist may enter emotional terrain. A portraitist must persist in the dance with intellect and insight, distance and closeness, acceptance and skepticism, receptivity and challenge, resistance, and silence. The portraitist must hold these juxtapositions in tension while looking to tell the whole story. While working to do no harm to those involved in the research, the portraitist must continually ask him or herself important questions about how to best forge a relationship sufficient enough to create an authentic portrait and how the results of the relationship offer insight into understanding the whole (Lawrence-Lightfoot & Davis, 1997).

> In the process of creating portraits, we enter people's lives, build relationships, engage in discourse, make an imprint . . . and leave. We engage in acts (implicit and explicit) of social transformation, we create opportunities for dialogue, we pursue the silences, and in the process, we face ethical dilemmas and a great moral responsibility. This is provocative work that can disturb the natural rhythms of social reality and encounter; this

> is exciting work that can instigate positive and productive change. We need to appreciate the benign, generous impact of portraiture, even as we recognize the huge, ethical responsibilities weighing on the portraitist. (Lawrence-Lightfoot, 2005, p. 12)

Emergent Themes. Finding and developing themes is the portraitist's first step to bring together data gathered from interviews, documentation, media, and observations. This iterative and generative disciplined process requires analytic scrutiny, aesthetic order, and interpretive insight while drawing out patterns allowing the researcher to create a thematic framework to construct the narrative. "She gathers, organizes, and scrutinizes the data, searching for convergent threads, illuminating metaphors, and overarching symbols, and often constructing a coherence out of themes that the actors might experience as unrelated or incoherent. This is a disciplined, empirical process—of description, interpretation, analysis, and synthesis—and an aesthetic process of narrative development" (Lawrence-Lightfoot & Davis, 1997, p. 185).

According to Lawrence-Lightfoot and Davis (1997), a portraitist "seeks to generate theory, not prove prior theoretical propositions" (p. 186). The portraitist enters into the research with a framework and guiding research questions but welcomes the adaptation of the research agenda and methods to fit the context and the subjects being studied. Developed before beginning interviews, the methodological plan and conceptual frame serve only as starting points while "identifying the intellectual, ideological, and autobiographical themes" (p. 186) that will shape the researcher's view. Both can be changed to adapt to what is discovered during any field research. The portraiture process is iterative, dynamic, and flexible, leading to "more focused research questions and more grounded research design" (p. 186). The researcher's framework for field study can reflect a mix of earlier research, practitioner experience, interdisciplinary predisposition, philosophical stance, intellectual curiosity, and the researcher's own life story.

It is with this framework and plan that the portraitist enters the field and begins to listen and observe, taking note of what is unexpected and well known. With each stage of data collection, the portraitist gathers and organizes what has been discovered, trying to make sense of and scrutinize what has been seen and heard. Creating this record allows the researcher to:

- find emerging hypotheses
- interpret suggestions
- describe shifts in perspective
- point to puzzles
- attend to methodological, conceptual, and ethical dilemmas
- develop a plan of action for the next interview
- see the interplay between relevant dimensions and emergent themes
- compare anticipatory schema and developing insights, and
- discover patterns, ideas, and phenomena (Lawrence-Lightfoot & Davis, 1997).

This ongoing assessment, or coding, of data and reflection, description, and analysis begins upon the start of fieldwork and continues through the entire research process. "The emergent themes grow out of data gathering and synthesis, accompanied by generative reflection and interpretive insights" (Lawrence-Lightfoot & Davis, 1997, p. 188). The emergent themes are constructed using five methods of analysis. The first finds the repetitive refrains spoken by the subjects interviewed. The portraitist hears a refrain being said many times by a variety of different people. The second method of analysis lies in resonant metaphors expressed by the interviewed subjects, exemplifying beliefs and giving them meaning. Third, the portraitist may see or take part in institutional and cultural rituals rife with symbolism and signs as emergent themes reflecting the subject's beliefs and principals. Fourth is the use of triangulation to

analyze themes. Using triangulation, the portraitist discovers points of convergence by looking at data from a variety of sources. Finally, the portraitist seeks out revealing patterns that do not always reveal themselves. Themes can also be discovered through finding coherence in what can seem to be chaos to the subjects being interviewed (Lawrence-Lightfoot & Davis, 1997).

Marshall and Rossman (2010) emphasize an adaptive, malleable research design being key to qualitative inquiry. Miles and Huberman (1994) describe the importance of iterative cycles to produce greater clarity and cultivation of emergent themes. Glaser and Strauss (1999) refer to this ongoing process as the constant comparative method. This ongoing coding guides the portraitist's activities allowing a flexibility in research design and ongoing assessment of data collection.

Like all qualitative research, there comes a time in the portraitist's research when scrutiny and analysis take precedent. After the collection of all data, the portraitist must spend significant effort in sifting through, analyzing, and classifying the interview transcripts, observational narratives, field notes, documents, and any other records. The researcher is in search of themes and patterns that will tell the story and paint the portrait in a coherent way. Goetz and LeCompte (1984) offer advice, suggesting a process for ethnographers that includes sorting, grouping, and classification, writing, "The notes are developed into a primitive outline or system of classification into which data are sorted initially. The outline begins with a search for regularities—things that happen frequently with groups of people. Patterns and regularities then are transformed into categories into which subsequent items are sorted. The categories or patterns are discovered from the data. They emerge in a rather systematic, if not totally conscious, application of the processes of theorizing" (p. 191).

Marshall and Rossman (2010) encourage the researcher to "identify the salient, grounded categories of meaning held by participants in the setting" (p. 116). They claim this stage in the research is where the researcher must stay grounded in the subjects' lived experiences while at the same time categorizing the data.

Miles and Huberman (1994) describe pattern codes as "inferential and explanatory" (p. 129). They suggest finding patterns by seeking "recurrent phrases or common threads" (p. 149). Their focus in this phase is finding hints among themes and subtle changes over time. They stress the importance of "maintaining the integrity and complexity of human thought, feeling and action rather than identifying broad categories of behavior" (Lawrence-Lightfoot & Davis, 1997, p. 191). Gilligan, Brown, and Rogers (1990) describe a process they call voice-centered analysis. According to Gilligan et al., voice-centered analysis captures "the situational, the personal, and the cultural dimensions of psychic life, including language and voice, perspectives and visions, and the relationships between the reader's and the narrator's ways of seeing and speaking" (p. 96).

Braun and Clarke (2006) describe flexibility in thematic analysis as a process for finding, analyzing, and reporting themes and patterns within data sets. According to Braun and Clarke, thematic analysis does not require the detailed theoretical and technological knowledge of other narrative approaches. However, it can "offer a more accessible form of analysis, particularly for those early in a qualitative research career" (p. 8).

The tension between the value of voice and experience and the importance of coding and categories describes the place where the portraitist lives. In portraiture, the researcher does not choose one side over the other. The portraitist embraces both coding, organization, and classification as well as supporting the human experience and meaning. "Usually these resonant

tensions ultimately get reflected in the portraitist's text where emergent themes both frame and scaffold the text, and the descriptive detail and empirical subtlety of the narrative allow for the expression of interwoven parts" (Lawrence-Lightfoot & Davis, 1997, p. 192).

The Aesthetic Whole. In the end, the portraitist must write the portrait and the discovered emergent themes are used to shape the aesthetic whole, or the product. How the researcher presents the emergent themes and the relationships between them illustrates the portrait and the location from whence it came. "The aesthetic whole is the actual portrait that evokes context, voice, relationship, and emergent themes of the research" (Hill, 2008, p. 3).

The final portrait is made up of four dimensions including conception, structure, form, and cohesion. These four processes must be synthesized to create an aesthetic whole, reliable and plausible to the reader. When they all come together, the aesthetic whole is credible and believable. The reader believes the portrait makes sense, the subject sees their self-reflected in the portrait, and the researcher sees significance in the blending of context, voice, relationships, and emergent themes.

Maxwell (2013) refers to writing a trustworthy narrative as validity. "The use of the term 'validity' does not imply the existence of an 'objective truth' to which any account can be compared. However, the idea of objective truth isn't essential to a theory of validity that does what most researchers want it to do, which is to give them some grounds for distinguishing accounts that are credible from those that are not. Nor are you required to attain some ultimate truth in order for your study to be useful and believable" (p. 122). A portraitist must strive to develop a final product that resonates with the subjects, the readers, and with the researcher who should see the truth in the final work.

Conception. The portraitist must first find the overarching story, or the big picture, that will pull the narrative together. This conception is pulled together from all the data, shaping the development of the narrative. The portraitist seeks a conception to "reflect the weight of empirical evidence, the infusion of emotional meaning, and the aesthetic of narrative development" (Lawrence-Lightfoot & Davis, 1997, p. 248). Most often, the conception appears from a dominant emergent theme that surfaces in a multitude of data sets. The conception of the portrait is expressed through repetition, reflection, and reiteration. Additionally, it is also echoed through difference and contradiction, emphasizing the importance of the divergent voice, and adding to the comprehensive nature of the method.

Structure. While conception is the overarching story of the aesthetic whole, structure is the supporting scaffold for the product. Structure is made up of the themes giving the narrative a frame or sense of organization. These interwoven themes bring the work together and reveal the design of the portrait. In portraits, these structural themes are visible as bold subheadings, or, less often, can be more muted. However, they always serve as markers for the reader and reflect a strong connection between the conception of the portrait and the structure of its components. "As the portraitist builds the structure she is both guided by the conception and responsive to the emergence of the larger pattern" (Lawrence-Lightfoot & Davis, 1997, p. 253).

Form. Form is the process for creating the flow of the narrative, fluid and graceful. If structure is the supporting scaffold, formal and mechanical, then form is the feel, nuance, and sentiment. For a portraitist, form is where the narrative comes alive with intellect, creativity, and aesthetics. "Standing alone, the scaffold is stark, bare, unwelcoming—unconvincing in its abstraction. But form—expressed in stories, examples, illustrations, illusions, ironies—gives life and movement to the narrative, providing complexity, subtlety, and nuance to the text, and

offering the reader opportunities for feeling identified and drawn into the piece" (Lawrence-Lightfoot & Davis, 1997, p. 254).

Coherence. Finally, the portrait is drawn together through creating a story with a beginning, middle, and ending. Through the sequencing of events there is a "rhythmic repetition of images, insights and metaphors—blending change and constancy, new developments and old refrains" (Lawrence-Lightfoot & Davis, 1997, p. 260), allowing the reader to increase their knowledge and understanding of the scene and develop a meaningful relationship to the subjects. The portraitist looks to create a constant balance between introducing new, relevant material and reiterating familiar and repetitive themes, refrains, metaphors, and symbols, as well as the constancy of the portraitist's voice and point of view.

Research Design

Dissertation research for this study started with sending an IRB-approved letter (Appendix A) directly to the CEOs and EDs of the iconic nonprofit organizations listed in Table 1.1, excluding Keep America Beautiful and AFS Intercultural Programs. I excluded Keep America Beautiful because it is the organization where I serve as the CEO. And I excluded AFS Intercultural Programs because I interviewed Daniel Obst for an earlier practice study, used to inform my dissertation research plan and reviewed in this chapter. The letter asked for agreement to take part in the study and consent to a video- and audio-taped interview. I also attached the consent form (Appendix B) for their review. Upon their agreement, I requested the names of one to two of their employees whom I could approach and interview about the CEOs leadership style and rebranding strategy. Subsequently, I sent letters and consent forms (Appendices C and E) to the employees of their choosing.

Potential benefits and risks to participants. I hope that the CEOs and EDs who agreed to an interview for this research gained a greater understanding and clarity of their own leadership style and change process. There is a slight chance of harm if they feel I have not written a portrayal of their personal experience in the way they wished. I requested to use the names of the CEOs and EDs through the consent form (Appendix B) and did not request to use the names of their employees (Appendix D). I made this decision because I wrote the portrait about a specific nonprofit leader at a specific nonprofit. However, I interviewed the employee to inform the research about the CEO's change leadership skills and experience. I did not guarantee the employee anonymity because a reader could make connections with the information provided, but I have not used any employees' real names in the final document.

In true portraitist style, I looked to find the good and positive aspects of the CEOs' experience in leading their iconic nonprofit through change. Additionally, I made efforts to report findings only with the permission of the participants. In my practice study with Daniel Obst, CEO of AFS Intercultural Studies/International (Appendix G), I shared with him that in the telling of his experiences, he could impact positive change with other nonprofit organizations in which the leaders are trying to effect positive, lasting reform. I shared with him the transcript of our interview and allowed him to make changes. I took the same steps throughout my dissertation research taken in my practice study.

Research population. I interviewed CEOs and EDs leading iconic nonprofit organizations until I could find trends in the data through coding the interviews. I was able to find trends after completing five portraits and ended up with a total of seven. The selection criteria for my research participants included:

- past or present CEOs or EDs of an iconic nonprofit in the United States

- led the organization through a rebranding and change process
- can provide 1–2 employees who worked with them in the process, and
- agree to have their experience told through my research.

After sending hard copy letter inquiries to the organizations outlined in Table 1.1, , I followed up with email versions of the formal letter (Appendix A) and consent form (Appendix B). I made phone calls to answer any questions and to schedule the interviews. Full descriptions of the procedure for enlisting participants are given in Appendices C and D. While I asked the CEO to name one to two employees, I only needed to interview one for my research. In most cases at least one of the two was never able to schedule an interview or they chose not to take part in the research.

My practice study was enlightening about how these steps might work. Before I even began the interviewing process with Daniel and his staff member, I was confronted by the difficulty of getting an hour of time on the schedule of the CEO of a large, iconic nonprofit organization. Daniel needed to postpone our interview at least three times before we met. This presented a challenge due to an impending deadline for the submission of the paper and my own schedule of travel and meetings. The realization of how challenging scheduling interviews between me and another nonprofit CEO was became slightly concerning to me early on and needed to be carefully managed as every CEO interview was rescheduled at least once during the study.

Additionally, Daniel provided me with the names of two of his direct reports as I asked, referred to here as AFS1 and AFS2. Because I knew AFS1 from my earlier employment with AFS of the United States, I tried to schedule an interview with AFS2. Unfortunately, AFS2 was unresponsive for weeks. In the end, I was able to schedule an interview with AFS1 who was

known to me, and never heard from AFS2 despite reaching out several times. This scheduling and the challenges that ensued left me with little time between finishing the written portrait of the pilot study and meeting the required deadline. In the end, I scheduled an interview with AFS1 to get a more complete set of data for my practice portrait of Daniel. This also proved to be status quo for the other seven portraits. I asked for the names of one to two employees from the CEO, and in most instances, could only arrange an interview with one even when I had two names.

Interview questions. The specific questions I developed were used to start conversation with my participants (Appendices E and F). They were designed to only serve as a guide for the conversations. While this interview tool was useful as a guide in my pilot study, I found there was little use for a formal interview format in my practice study. Both Daniel and his employee were eager to talk, explain their process, leadership style, and tell the story of their experience in detail. In interviewing the seven CEOs for the research, it was a useful guide to keep the interviews on track and access data in a more meaningful, deeper way.

Data collection. The idea of embedded video of the CEO interviews, and as an integral part of the portrait, was exciting to me but something about which I knew absolutely nothing going into the practice study with Daniel. During the practice interviews, I also audio recorded what was being said through an app on my phone. The app, Otter, supplies a transcribed version of the interview, which is far from perfect but allowed me to go through the interview without spending hours on transcription myself. This audio recording also served as a backup just in case the video recording did not go well. Both of my practice interviews were with participants who speak English as a second language. In both cases, Otter was quite good at transcribing their words as they were said. Where there were mistakes, I fixed through listening to and

watching the video recordings myself. This same process was used in this dissertation research, except the CEO interviews were professionally transcribed and then sent to the CEO for final edits and approval.

Once the interview with Daniel was coded, I found the writing to go quickly with the portraiture methodology. Because of the concern around portraiture within the Antioch faculty, I was intent on presenting a portrait that was rigorous and valid. With just a single interview and case in the practice study, I was unable to make comparisons with other CEOs. However, once I had the seven other interviews completed, I was able to compare the data amongst them all to reach meaningful conclusions about how iconic nonprofit leaders rebrand for renewed excellence.

As noted previously, portraiture is more than an interview. The research also depends on observation and document gathering as well. My data collection for each portrait included earlier research on the nonprofit, media from news sources, online information, and other sources.

Data analysis. Prior to meeting Daniel for the interview, I jotted down in my field notes a few themes I thought might come up in our interview. While some of them did come up, such as strategy, mission, and external support, many others did not. When I completed the interview transcription, I began to code the interview using the portraiture methodology as described by Sarah Lawrence-Lightfoot and Jessica Hoffman Davis (1997) in *The Art and Science of Portraiture*. Utilizing the five methods of analysis, I coded the information from my interview with Daniel, resulting in many sticky notes summarized and reflected in a chart (Figure 3.1). Using these main themes and topics, I created an outline for the written and visual parts of the portrait. This process for coding the interviews went well and was replicated in all future

interviews. While I did not share the interview transcript with Daniel, I did with the seven participants in this dissertation. By sharing the transcribed interview, I allowed them to check for factual accuracy and extended them the opportunity to correct any part of the interview that did not honor their beliefs or opinions.

Criteria for assessing trustworthiness. Lawrence-Lightfoot and Davis (1997) describe the portraitist's standard as one of authenticity occurring when there is resonance from three perspectives. First, the research participants should see their true selves reflected in the final product. In my case, the CEOs should recognize their story and find it to be believable, valuable, and true. In addition to offering an opportunity to review the transcribed interview, I will share the results of the entire research study with all interview participants upon completion. Second, those who choose to read my dissertation should find it to be believable. This should occur because enough information and data were provided as evidence for the conclusions drawn through the research. I supplied information on what the participants said and the context surrounding them to allow readers to understand that my conclusions make sense, have validity, and are transferable. Third, as the portraitist, I should be able to see truth and value in the work. I believe my findings make sense and are credible. Corroborating my interview findings with other documentation and sources was also a crucial step in this process.

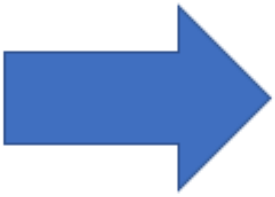
Repetitive Refrains	
Theme 1-Strategy	Theme 2-Organization
Process	Network
Impact	People
Change	Partner
Resonant Metaphors	
Suit & Tie=Powerful, changing organization	Co-creation=One AFS
Institutional and Cultural Rituals	
Mission	History
Thought Leadership	Board of Directors
Triangulation	
Daniel Interview Annual Reports Office Environment Strategy	 Impact Goals People One AFS Mission History
Revealing Patterns (Divergence/Dissonance)	
Office Furniture/White Board Wall	Noah

Figure 3.1. Coding chart used to outline five methods of portraiture analysis during practice study.

Conclusion

Portraiture is a young methodology that has only recently gained substantial recognition in academic research communities. The methodology blends the artistic with the doctrine of

social science research. A portraitist keeps a commitment to the research subjects and tells stories depicting individuals, events, and environments. Dixson, Chapman, and Hill (2005) describe portraiture as a "blending of qualitative methodologies—life history, naturalist inquiry, and most prominently, that of ethnographic methods" (p. 17).

In many ways, paradox is key to successful portraiture. The process of creating narrative portraits requires a paradoxical approach to empirical description and aesthetic expression, as well as a cautious use of voice. Portraiture is both a rigorous process and a creative one. The data must be carefully reviewed and analyzed to find the story, or stories, to tell. Yet, what the portraitist determines should be left out can be as important as what is included. It is the silences that can add shape to the story as well. Interpreting what is seen and experienced rather than only what is said can add value and meaning to a well-told story.

> For the portraitist, then, there is a crucial dynamic between documenting and creating the narrative, between receiving *and* shaping, reflecting, *and* imposing, mirroring *and* improvising . . . a string of paradoxes. The effort to reach coherence must both flow organically from the data *and* from the interpretive witness of the portraitist. (Lawrence-Lightfoot, 2005, p. 10)

The final portrait (the product) is perceived as unified and whole, just as the methodology of portraiture (the process) is conducted as a unified undertaking. Virtually seamless in the end, the process is made up of various parts including the surrounding context, expressed by voice, informed by relationships, and organized into themes that come together to create the aesthetic whole.

In this chapter, I have described the portraiture research approach I used for my dissertation. The chapter has examined the research design, process for data collection, and data

analysis procedures. Chapter III also reviewed my reasons for selecting portraiture as my research methodology, in addition to the principles and attributes of portraiture. Chapter IV of this dissertation presents the data and findings from my research, including all interviews, integrated into portraits. Finally, Chapter V will discuss the implications of the results and suggestions for further research and inquiry.

Chapter IV: Findings and Portraits

In Chapter IV I: 1) describe the process used to generate the data and the methods used for keeping track of the data, 2) present the individual portraits of each nonprofit CEO interviewed, and 3) discuss the recurring themes and patterns found throughout the portraits.

The seven CEOs of iconic nonprofit organizations that I had the privilege of interviewing for this research have all made a choice to have a career that creates a better world for the people who live in it. Every day they make decisions that contribute to the legacy of those who came before them to fight disease, protect birds, educate the public, respond to disasters, build youth skills, and much more. Their dedication to the mission they represent and to the stakeholders who implement the mission is without bounds, as they plow forward to renew the relevance of the behemoth organizations under their watch.

Lisa Sherman, my first interview participant, is the President and CEO of The Ad Council. Sherman has spent her career leading, transforming, and growing brands and businesses in the media and marketing sectors. In addition to her work at The Ad Council, she is on several boards and is engaged at the intersection of business and social good throughout her personal and professional life. My second interview was with Stacey Stewart, President and CEO of March of Dimes. Stewart only recently came to the organization from United Way Worldwide where the served as the President of the United Way in the United States. She is also a veteran of the private sector and held many leadership positions at Fannie Mae, including President and CEO for the Fannie Mae Foundation. Gail McGovern, President and CEO of the American Red Cross, was my third interview participant. The longest serving CEO of the seven, she oversees one of the largest and most well-known nonprofits in the United States. She led the organization through disasters such as Hurricanes Sandy, Harvey, Irma, and Maria. Before she

joined the Red Cross, she was on the faculty of Harvard Business School, was President of Fidelity Personal Investments, and was Executive Vice President at AT&T. My fourth interview participant was John Hewko, General Secretary and CEO of Rotary International and the Rotary Foundation. As a Harvard-trained lawyer, Hewko spent much of his career overseas with law firms before returning to the United States to accept a presidential appointment by George W. Bush to the newly created Millennium Challenge Corporation. He has also been a scholar at the Woodrow Wilson International Center, and an adjunct professor of law at Georgetown University, and a visiting scholar at the Carnegie Endowment for International Peace. My fifth interview participant was Jim Clark, President and CEO of the Boys and Girls Clubs of America. Clark spent 24 years working at the Journal Sentinel in Milwaukee before becoming the President and CEO of the Boys and Girls Club of Milwaukee. Jennifer Sirangelo, President and CEO of the National 4-H Council was my sixth interview participant. Sirangelo came to the National 4-H Council after about six years at the Boys and Girls Clubs of America. She is the only participant promoted into the CEO position from within the national organization, after serving eight years in other leadership roles. My final interview participant was David Yarnold, President and CEO of Audubon. Yarnold spent 27 years of his career as a journalist at the San Jose Mercury News before moving into nonprofit leadership as the ED of the Environmental Defense Fund. In his current role, his transformational leadership of Audubon has been the subject of a Harvard Business School case study.

These seven leaders are all unique individuals, and demographically semi diverse. The group includes four women, three men, one black, six white, one known lesbian, and one known Republican. At the time of the interview, their ages ranged from 48 to 67, and their tenure as CEO ranged from 1.5 to 11 years. These demographics are consistent with those of nonprofit

CEOs in the United States (Cornelius, 2011; Lindsay, 2017; Suarez, 2017). Table 4.1 displays the specific demographics of the seven participants.

Table 4.1

Participant Demographics

Name	**Age**	**Race**	**Sex**	**Tenure**
Lisa Sherman	61	White	Female	2014
Stacey Stewart	55	Black	Female	2017
Jim Clark	58	White	Male	2012
Jennifer Sirangelo	48	White	Female	2014
John Hewko	61	White	Male	2011
David Yarnold	66	White	Male	2010
Gail McGovern	67	White	Female	2008

Yet, while the participants were diverse in their demographics, they also had much in common. They all expressed an intense passion for the mission of their organization. They all were strategic, transformative leaders. And they all were working tirelessly to rebrand and renew their legacy nonprofit into an innovative, relevant organization.

The Process

I used the qualitative method of portraiture to express the difficulty, complexity, and intricacies of rebranding and transforming an iconic, legacy nonprofit. I shaped and defined the portraits of these seven CEOs through dialogue and interaction with each of them, their direct reports, and a variety of articles, websites, and media sources. A pilot interview with Daniel Obst, President and CEO of AFS Intercultural Programs, informed my process and allowed me

to practice interviewing and using the portraiture methodology and technique. As the President and CEO of an iconic, legacy nonprofit, Keep America Beautiful, I brought my own lens to the study as I gathered the data.

My research started by sending hard copy letters to 23 leaders who fit into the criteria of a United States-based nonprofit organization started prior to 1960. I then followed up with an email of the same letter, along with consent form information. Of these, nine responded and agreed to an introductory phone call. After the calls, and over time, I scheduled eight interviews. Out of the eight CEOs who cancelled the interviews, seven rescheduled. Despite being very intentional about getting a racially diverse sample, I was only able to secure one racially non-white diverse participant. My original list of 23 included eight racially diverse leaders, many of whom I reached out to several times. In a final effort, one of my dissertation committee members offered two more suggestions of racially diverse nonprofit CEOs who fit my criteria. Using my network, I tried to connect with both, and neither responded.

Travelling to New York City, Chicago, Washington, D.C., and Atlanta, I video- and audio-recorded the CEO interviews in their office or on Zoom, or, in one case, just audio-recorded on the phone. Upon completion of the CEO interviews, I audio-recorded interviews of at least one of their direct reports in person, on Zoom, or by phone. A professional transcribed the CEO interviews and I sent the draft transcriptions to each CEO for their review and edits to ensure it reflected what they intended to say. Ottr.com transcribed the staff interviews and I carefully reviewed the recordings to ensure accuracy. I read and re-read all interviews to find recurring and emergent themes. "The development of emergent themes reflects the portraitist's first efforts to bring interpretive insight, analytic scrutiny, and aesthetic order to the collection of data" (Lawrence-Lightfoot & Davis, 1997, p. 185). While each portrait is unique and stands

alone, the recurring, emergent themes reveal best practices and leadership traits across the spectrum of participants.

By reviewing the written transcripts, listening to the audio recordings, and watching the video recordings, the participant interviews revealed resonant metaphors, institutional and cultural rituals, and sometimes dissonance, in addition to the themes. The voices of these seven nonprofit CEOs revealed the major repetitive themes to be communication, organizational culture, management and decision-making, people, and vision and mission, with history and legacy being an important theme but only recurring in two interviews. Table 4.2 reflects the repetitive themes of each interview.

Table 4.2

Repetitive Themes in Participant Interviews

Name	Communication	Organizational Culture	Management Decision-making	People	Vision Mission	History Legacy
Sherman	X	X		X		
Stewart	X	X	X			
Clark	X	X			X	
Sirangelo	X			X	X	
Hewko		X	X			X
Yarnold	X		X		X	
McGovern	X			X		X
TOTAL	6	4	3	3	3	2

"The emergent themes grew out of data gathering and synthesis, accompanied by generative reflection and interpretive insights" (Lawrence Lightfoot & Davis, 1997, p. 188). By coding each interview, I was able find the best practices and dimensions each of these leaders uniquely applied and bring the data together to find the universal dimensions of rebranding an

iconic nonprofit. "The scientist and the artist are both claiming that in the particular resides the general" (Lawrence Lightfoot & Davis, 1997, p. 14).

Effective leaders embody knowledge, intelligence, skills, and experience. As these seven portraits reflect, equally important is self-knowledge, humility, and the willingness to sacrifice for the mission of the organization. Nonprofit CEOs must constantly question assumptions, challenge the status quo, and take risks to renew the relevance and rebrand in a way that reflects innovation and renewal.

Jim Clark—Boys and Girls Clubs of America

I think the notion that changes take place and then things go back to some level of normalcy, or that we're at this new plateau and that's where we stay and stabilize, those days are gone. Change is a constant.

—Jim Clark, President and CEO, Boys and Girls Clubs of America, August 22, 2019

Please see supplemental video file "Jim Clark."

It is a beautiful, sunny day in Atlanta. I decide to walk the one mile from my hotel to the headquarters building of the Boys and Girls Clubs of America (BGCA) where I am to meet and interview Jim Clark, the President and CEO. The Boys and Girls Clubs of America is in a prominent location in Atlanta, across the street from the Woodruff Arts Center, where the Atlanta Symphony Orchestra, the Alliance Theater and the High Museum of Art are based. As I walk by the Center, a young black man is sitting at a piano outside the building playing a beautiful song. The piano is under the portico, painted to appear like green marble. The man is wearing a backpack and appears to have stopped by to play just for a few minutes as he passed. I stopped and listened to his music for a while before heading across the street to meet Clark. In front of the BGCA building there are several life-size statues of children reading and plaques

marking years of service of persons who had passed away, some of them showed as many as 50 years in service to the mission of the BGCA.

The lobby of the organization is brightly colored, and photos of prominent BGCA alumni cover every inch of the walls, floor to ceiling. The small area displays hundreds of politicians, military officers, professional athletes, actors, musicians, judges, and more. I think to myself that they are going to need a larger lobby soon. On a small table next to me are two plastic frames. A card printed with the organizational vision, mission, and core promise is in one of the frames, and a card printed with a statement of values is in the other. The listed values are integrity, collaboration, accountability, respect, and excellence. These are the values of the BGCA national staff. Their website adds, "BGCA's values can be summed up" up in two words, "I care" (Boys & Girls Clubs of America, n.d., para 1).

Clark's assistant comes to meet me and escorts me to his office. Clark is wearing a dress shirt and tie, without a suit jacket, frameless glasses, and a warm smile. His hair is strawberry-blonde and cut short. His eyes and tone are friendly, and his demeanor conveys a leader with no time to waste. So, we sit down and get straight to the questions.

According to Clark's LinkedIn page (Clark, n.d.), he began working at the Milwaukee Journal Sentinel the same year he entered the University of Wisconsin-Milwaukee. Twenty-four years later, Clark left the Sentinel to become CEO of the Boys and Girls Club of Milwaukee. Clark says,

> The short story is when I was in the for-profit business world, I got involved with Boys and Girls Clubs through the simple notion that our future workforce was sitting right in front of us. And it was, in this case, urban Milwaukee. And my thought was basic in the sense that if we could make sure or ensure these youth were prepared for the future— and

> this was such a great pool of young people—that we would have a great viable workforce. That was the notion of how I got involved as a volunteer to begin with." Clark says he rapidly noticed the "transformational power of the Boys and Girls Clubs and the impact they have on kids, their families, their extended families, neighborhoods, communities, and how important this was to the fabric of any community.

Clark started with the Boys and Girls Club of Milwaukee as a volunteer. He volunteered for about nine years until there was a transition in the CEO role. Clark tells me the story about how several members of the board, who he knew, reached out to him and said, "We need some help. This transition would be special for you and the opportunity to marry your passion with your profession, truly a once in a lifetime opportunity." Clark knew they were right. He became the Milwaukee CEO in 2004 and the BGCA President and CEO in 2012. Clark tells me, "Then one thing led to another and a call came from Boys & Girls Clubs of America, and so here I am."

The beginning of BGCA was in 1860 with three women in Hartford, Connecticut: Mary Goodwin, Alice Goodwin, and Elizabeth Hammersley. The three women believed that "boys who roamed the streets should have a positive alternative" (Boys and Girls Clubs of America, n.d.-b, para. 5). The three women organized the first club and worked to capture boys' interests, improve their behavior, develop their character, and increase their personal expectations and goals. Many years later, in 1906, several of the Boys Clubs decided to affiliate. "The Federated Boys Clubs in Boston was formed with 53 member organizations—this marked the start of a nationwide Movement" (Boys and Girls Clubs of America, n.d.-b, para. 6) and marks the founding of the national organization. In 1990, the organization changed its name to include girls, and became the Boys and Girls Club of America (Boys and Girls Clubs of America, n.d.-b, para. 8). Today the mission of the organization is, "To enable all young people, especially those

who need us most, to reach their full potential as productive, caring, responsible citizens" (Boys and Girls Clubs of America, n.d.-a., para. 2).

Clark begins our conversation by explaining how he believes change happens today:

> I think change agility and change management and leading change is what society is today. I think the notion that changes take place and then things go back to some level of normalcy, or that we're at this new plateau and that's where we stay and stabilize, those days are gone. Change is a constant is what I'm leading into here. Recognizing that is important. Then I think the whole process of change takes on different life forms. It could be very rigorous in some forms when it comes to project management type approaches. Which is one of the things we installed here to look at the tactical side of initiatives when it comes to change, which I think was important. From the project charter to executive sponsors to the work team that was going to implement [the changes]. To deal with [the implementation and tactics], we formed a planning and operations council here, which we didn't have before, to focus on some of the initiatives inside of the agenda.

In 2015, Clark began to lead the BGCA through the creation of a new 10-year strategic plan. Clark believes much of change leadership and rebranding is focusing on the strategic plan. "As you think about strategic plans, too many times they get developed and put on a shelf and they sit there and business goes on or things happen as they were, and really, there's no change. I take strategic plans seriously." When Clark began to look at rebranding and innovating at BGCA, he asked the simple question, "Is our organization aligned to deliver on our strategic plan?" The Board of Directors, the senior team, and Clark agreed that they were not aligned, and they needed "to do some things differently if we're going to be able to deliver on this vision and

direction of this strategy." Clark is adamant about aligning his team and the work of the organization with the strategic plan that outlines how their rebranding will occur. He starts every staff meeting by breaking down the goals of the strategic plan. He explains his process by saying,

> We break it down by, not just the big goals, but what do we need to do to make sure we're supporting those goals and resourcing those goals or those pillars. Then each week, how are we doing against that? What do we need to do differently? Can we see the measurable results here or not? Then what do we need to change?

Decisiveness is one of the leadership traits Clark mentions as important to his rebranding efforts.

> I think we get caught up in complex, sophisticated enterprises. It has tentacles all over the place. You're not going to be perfect, but you've got to make decisions. The worst thing is being indecisive because everybody gets paralyzed and it trickles down. I try not to linger. Now, bigger decisions, of course, you want to be as informed as possible, but many things, you need to tell yourself—'Let's just move. Let's go and move out on this.'

When I had the opportunity to speak with one of the members of the executive team, she confirms this about him, "When he makes a decision, he doesn't waver. He has the ability to manage through ambiguity. And he's one of those leaders that, you know, he gets just the right amount of information, and he can easily make a decision. He doesn't linger in that space." Her description of him fascinates me as she describes his ability "to see around corners." She says, "It is actually amazing to work with him because he can see around corners. Not many people can do that. But the people that can make great things happen."

As Clark and I continue to talk he describes the extent of the changes he has led at BGCA: “We changed so much in terms of how we operate and how we go to market and what we do. There's the internal piece and then we have a huge affiliate network of 1,100 affiliates across the country. So, this wasn't just a national Boys & Girls Club of America plan, this is a movement-wide, enterprise-wide plan. The plan was the creation of a national planning commission and then a few years of vetting and feedback from the field. This communication track or internalization ownership is equally significant outside of the national organization. That takes time and repetition. A lot of repetition and communication.”

Clark tells me that the planning piece was first but there was much to do to implement and ensure success: “It was this notion of casting the vision of what we want to look like, a lot of communication, and then dealing with the change itself. Because too many times the organization is very good at leading up to the change and executing the change, and then it stops” and, “If you look up some of the basic steps of change management, that's certainly what we did. But I would say the big pivot, at least, in this organization was aligning our service and our support, if you will, to the tentacles or priorities of the plan. I think that's probably the number one big shift that took place. Then, again, the rest is how we went about it.”

The focus on communication came up several times while Clark and I spoke. When I asked him about his leadership traits, he said, “Transparency, I think, is another important component that I focus on. Not easy because there are certain things that you just really can't talk about. But to a large degree, most you can, and trying to be focused on extreme transparency, and then communication. You can't communicate enough. Once you think you've communicated, do it again and again. Yet, in today's technology world, I think we are inundated with too much so you've got to be really acute and pinpointed. It's not one form. It's being

present, visible in front of staff, or whatever your constituent group is. So, whole active engaged communication, I think, has been something important to me as I go forward."

So much of what Clark focuses on is people, and he has many stakeholders about which he must be concerned. Both he and his colleague describe his leadership using many of the same words. For example, they both say he would not ask anyone to do something he would not do himself. He uses a "lead with the heart approach" and tries "to be the servant leader." Using an adage, he believes he must lead by example. He says, "I think too many times leaders lose sight of those things. If you look at it, the principles, or whatever you want to call it, competencies, they're no different than what they've been over time. I think, we just get twisted up sometimes on them and lose sight of what that is."

The culture of any legacy nonprofit is rooted in history. For Clark, cultural change at BGCA means honoring the history of the organization while focusing on where he wants the mission to go. He knows cultural change does not happen quickly. He emphasizes, "It takes years and years to do." However, he has instituted many cultural shifts in the organization through his rebranding efforts.

> An example here that I brought in was the creation of our values and then how this shapes what our behaviors are and how we go about our work around these values so that our culture evolves to where we want it to be. I didn't create the values. We assembled a team of 50-some people together to do this. And they're called 'I care.'

He points out the framed version that is sitting next to me in his office. And tells me there is a similar version in every meeting room. These values are their beliefs and he is leading the organization towards living them.

Clark says more about the cultural importance of the values and emphasizes to me, “It's a journey, and it takes time…this is something that we all live by. It tests us sometimes, as you can imagine, but that's a good thing. That's a good thing. That's just one of the examples.”

Another example is the importance of understanding the subcultures that exist within the bigger organization. As Clark describes,

> There's always multiple parts of culture in our space. There's separate cultures because in an affiliated network, there's a culture in every one of those affiliates. Then there's the enterprise culture and then there's this national organization culture and then you have the volunteers, you have a board, so you have a board culture. You have multiple pieces to this. I think the key is recognizing your audience, and obviously, the culture of that is really important.

As my time with Clark comes to an end, I ask him if there is anything more he wants me to know. He focuses on summing up our conversation with three points: communication, mission, and culture. First about communication he says,

> This is all about bringing people along with you. At times, you're in lockstep and at times, you're not. But the better you can get at bringing people along, the better off you are. Whether that's through communication or interaction or behaviors or symbols or whatever, I think it's really, really important.

Second, when he refers back to the importance of the mission, he says,

> Take time to really explain the ‘why’ because if you missed that, it doubles the execution phase. The clearer everybody is on why we need to do this, the better off. It's easier in nonprofits, by the way. Mission-based are much easier [and] quicker to get there.

Finally, he alludes to the importance of cultural change, stating,

> I think, whatever the shifts are, working and focusing to keep people updated as you go [is important]. I think, as I said earlier, too many times we do a good job getting there and executing, and then we don't reflect and critique. So, revisiting and having time to reflect, celebrate and/or change, and, if we have to, repurpose.

As Clark describes BGCA's rebranding and his transformative leadership, I can see a person whose passion for the mission does not allow for him to waiver. I believe the urgency he feels translates into everything he does at BGCA. His colleague described him continually asking if they can move up their timeframes because he knows kids do not have years to wait for their programs and interventions. The unwavering urgency he exhibits shows up in how he leads the organization every day.

His colleague describes it well when she tells me, "We all have this great level of respect for who he is as a leader. He's a driver. I mean, don't get me wrong, he is a driver. But it's easy to show up and work hard when you have a great deal of respect for somebody that's not afraid to show emotion, somebody that you know, frankly, loves this mission."

So much of what Clark says is almost textbook change leadership. He's got it all right and should probably plan to teach or write a book at some point in his life. He offers me a small peak into some of his personal philosophy, too.

> "To me, it's pretty simple that in life, I believe there's only two ways to go no matter what the topic is … it's either up or down. And I'm just not interested in down. Nor are the kids and teens that are served at Boys & Girls Clubs. Because down means something worse than what they have today and that's not what we're all about. So, I think and talk a great deal about reinforcing that.

"Leadership is a privilege. It's an honor, certainly in this enterprise to lead a movement, a mission like this. It is very special and I take it very seriously. I think, first and foremost, whether it's a trait or just a conscientious part of what I believe in, is I take leadership seriously. I understand the responsibility and the accountability that comes with this," states Clark.

As I leave Clark's office, I think how intentional he is about being a great leader and making a real difference in the lives of so many children. It is so clear to me he works every day and every minute to be the leader that he has described he is. I get on the elevator to go down and see the doors in front of me read, "Whatever it takes to build great futures." There is no doubt Clark is taking that to heart and doing whatever it takes to lead the Boys and Girls Clubs of America to a great future.

John Hewko-Rotary International and The Rotary Foundation

My philosophy has always been if you want to change the organization, go forward with something that's a ten, knowing you're going to get an eight. Because if you go in with eight, you're going to get six. If you go in with six, you're going to get four. It's the nature of politics in a multifaceted organization.

—John Hewko, General Secretary and CEO, Rotary International and The Rotary Foundation, August 21, 2019

Please see supplemental video file "John Hewko."

Flying into Chicago's O'Hare International Airport always seems to be a gamble. In my experience, flights are delayed or canceled due to the weather, and luggage gets lost due to the incredible amount of air traffic coming in and out of the airport. And, as it would happen, my flight was delayed for 12 hours and my luggage was lost when I flew into Chicago to interview Rotary International's General Secretary and CEO, John Hewko, at his office in Evanston, Illinois.

Fortunately for me, Evanston is a lovely part of the North Shore of Chicago with a convenient Target superstore where I could buy everything I needed to get through the afternoon's meeting. Situated directly on the lake, north of Chicago, Evanston is known for its architecture and lakefront homes. The city's government website states, "Evanston continues to prosper and refuses to be overshadowed by Chicago" (City of Evanston, n.d., para 5). It is also home to the large buildings housing the offices of both Rotary International and the Rotary Foundation.

I walked to the building from my hotel wearing my newly purchased Target clothing. It was a sunny August day and three flags flew in front of the building displayed in the wind. The flags of the United States, Illinois, and Rotary fly above the statue of a man sitting on some packing crates, holding a baby to whom he is giving a polio vaccine. Two children, a black boy and an Asian girl, stand next to him watching. The man in the statue "represents one of the thousands of Rotarians throughout the world who have donated time and money in an effort to protect children in developing countries from the crippling disease" (Lucadamo, 1991, para 3). A red brick walkway led me to the front doors of Rotary. Beds of red flowers and trees decorated the front from end to end.

Once inside the lobby, a security guard asked me to wait, and I began to look around at the exhibit on Rotary's role ending polio around the world. Multiple panels describe the programs and process Rotary has used since 1979 in its fight against polio, resulting in the immunization of 2.5 billion children and a 99.9% reduction in cases of polio since 1988. In addition to this exhibit, the lobby of the Rotary building is striking with large wood paneled walls and marble floors. For a variety of reasons, it reminded me of some law firms I have visited.

Hewko came down to the lobby to greet me and escort me to his office. A Harvard-trained lawyer himself, he fits in well with the surroundings. He is tall and fit, with brown hair slightly highlighted with some grey on the sides. Others may disagree, but I think he looks like Mitt Romney. For the past eight years, he has ridden his bike in the Ride to End Polio, a 100-mile, seven-day event that raises millions of dollars matched by the Bill and Melinda Gates Foundation. Hewko's office is on the top floor of the building and the corner windows overlook Lake Michigan. He begins by telling me how his career led him to Rotary.

> Sort of going back, I'm a lawyer by training and after graduating from law school, I went to Latin America for two years and practiced for a year in Argentina and a year in Brazil with local law firms and then came back to Washington and joined the DC office for a large Los Angeles firm. Then I had heard that Baker & McKenzie, which is another large national law firm, was looking for someone to join the team that was going out to open the firm's office in Moscow. And so, in 1989, I left Gibson Dunn and joined Baker McKenzie. It was interesting because my wife is from Argentina and we got married in December of '89 and literally two weeks later, moved to Moscow. She's probably the first and last Argentine that ever did a honeymoon in the former Soviet Union

As he describes his wife's honeymoon, I exclaim what incredible culture shock that must have been for her.

Hewko spent a few years in Moscow, and then moved to Ukraine, and five years later to Prague. After six years in Prague, Hewko decided it was time to move back to the United States in 2001. "Our daughter had never lived in the States. We wanted her to feel American. And I wanted to give back. I wanted to do government service. I had done well financially as a partner of Baker Mackenzie," he tells me. He got his opportunity for government service when the

George W. Bush presidential administration asked him to take on the role of Vice President for Operations at the Millennium Challenge Corporation (MCC), a new government agency just being set up. Hewko describes his time at MCC saying,

> That was a phenomenal experience to be able to stand up a federal agency and be in charge of building an idea I was very passionate about. Particularly, the new way of delivering foreign systems, and the trending private sector principles in the aid space. I was a political appointee. So, Obama won, and he asked me to stay on for about six months during the transition in July of '09.

A short while after he exited MCC, his father, a highly active Rotarian, was reading the Rotary magazine and saw an advertisement about Rotary searching for a new General Secretary and CEO. He tore it out of the magazine and wrote, in half Ukrainian and half English, "John, you may want to check this out. It seems like you have the qualifications." Today, he has the torn article from his father framed in his office. He commonly tells this story, saying, "Two important lessons you learn from this experience is; one, always listen to your dad. The second is great things happen when you read the Rotarian magazine."

Paul Harris started Rotary in 1905. A Chicago attorney, Harris formed the Rotary Club of Chicago to bring together men for friendship and fellowship. Soon after, Harris realized the club needed a bigger purpose. He led the group to begin humanitarian work by building toilets in Chicago (Rotary, 2019a). Today, Rotary is a worldwide network of 1.2 million Rotarians. Seventy percent are outside of the United States. About 36,000 clubs work to fulfill the mission of providing service to others, promoting integrity, and advancing world understanding, goodwill, and peace. Projects cut across the world's most pressing issues such as promoting

peace, fighting disease, supplying clean water, sanitation, and hygiene, saving mothers and children, supporting education, and growing local economies (Rotary, 2019b).

The complexity of Rotary is not lost on me. It is a massive, global machine. Hewko explains the details to me, saying, "We have two separate legal entities. We have the Rotary Foundation, which is our (c)(3), and that's the vehicle we use to raise money. Our foundation raises around $400 million a year for polio, and for all the activities that Rotary Clubs do. That's sort of our fundraising wing. Then we have a (c)(4), which is Rotary International, which is the umbrella for our 36,000 clubs. Both entities are housed here in this building in Evanston."

Hewko goes on to explain how both the Rotary Foundation and Rotary International have their own boards of directors, and because they are a membership organization, the board positions rotate every two years at Rotary International and every four years at the Rotary Foundation. Upon arriving at Rotary he had to break down the existing silos and brought the brought the two organizations together to provide a better service to the Rotarians in the field. His colleague confirms and adds, "I believe there probably was also a cost reduction as a result of that, too."

The leadership of these boards, as well as all of those in the clubs and districts, changes every year. Hewko offers an explanation by saying,

> It's not like you're the CEO of McDonald's and you have 36,000 franchisees and you say, 'Okay, next Tuesday, our arches are going to be pink to commemorate whatever,' and all the arches change to pink. You have 36,000 clubs that are autonomous, in a way, and you just can't dictate to them: 'You must do this. You must do that.' Plus, given that we're global, the cultural differences and approaches—it's like running the U.N. In fact, this is like the training to be the Secretary General of the UN. I got the wrong passport.

I laugh and tell him that will be his next job.

The constantly changing governance structure of Rotary makes driving any kind of change exceedingly difficult. He says,

> To extent the change takes several years to implement, you're going to have, by year three, a completely different cast of people at the board level, and certainly, you'll have had three presidents by then and so the continuity piece is challenging… The challenge in terms of anything that takes five, ten years to implement is that by year ten, you've got nobody who even remembers what it was like earlier.

Rotary's demographics are also changing. Membership is declining in countries where the middle class is mature, and membership is increasing in emerging market countries.

After supplying me with the background information of Rotary and the governance structure, Hewko tells me how he has worked to effectively drive change and rebrand in such a complex organization. He says,

> A lot of patience. As a practical governance matter, I need to begin any sort of change by identifying Rotarian volunteer leaders within the structure. Bring them on board as ambassadors for the idea and then turn it into their idea and then have them drive it through the process … But it's a massive complicated chess game to kind of frame things in a way that's appealing to a constituency that's really broad and really different across the board. There's no magic to it other than framing the issue and then politically and mechanically strategizing within this complicated framework as to what the best way to move this thing forward. You realize that it's really about getting to 'yes.' You can't be dogmatic. You can't be, 'it's my way or the highway.' You really have to be a politician.

> Whether it's an idea coming from staff or whether it's an idea coming from volunteer leadership, the art of compromise is absolutely critical here.

When I had the opportunity to speak with Hewko's colleague, he confirmed that the rate of change at Rotary is much slower than Hewko's tolerance for it. He added that he deeply admired Hewko's willingness to take things on. Like any massive organization, change does not happen quickly. Hewko compares it to an aircraft carrier versus a series of PT boats. He is positive because Rotary has an appetite for change, and he believes "people are realizing we need to rethink our organization pretty significantly in a positive way."

In 2013, Hewko wrote a short article for the Harvard Business Review about Rotary's success eradicating polio. In the article, he refers to three lessons for large-scale managerial undertakings: "(1) Don't be intimidated by sheer magnitude—break the job down. (2) Make sure the goal matches your mission and make it personal for your people. (3) Recognize that you can't go it alone" (Hewko, 2013, para 2).

Like so many other leaders, Hewko focuses on communication as a priority, and tells me,

> I think a lot of it is, whenever you're trying to move some change, it's communicating openly, effectively and transparently in terms of what you're trying to achieve, why you're trying to achieve it, when it's going to happen and how does it impact you personally. Because for most people, change is fear of the unknown. What's this going to mean for me? My job is lost. Does it mean that my job is now becoming less or more interesting for this rebranding? Does it mean we're now ditching our values and our traditions?" He goes on and adds, "Because the values of Rotary are very deep in this organization. The values of ethics, the values of giving back, the values of fellowship, what they call fellowship, the interpersonal connections between Rotarians. There was a

> concern, does this mean we're throwing all that out the window? We're abandoning this deep tradition? Rotarians, rightfully so, are extraordinarily proud of the tradition and accomplishments of the organization. So, I think it's as simple as a communications exercise. It's trying to identify what the people's fears are going to be and to address those fears head on.

Hewko's practice is to explain the philosophy behind any change decision, and why the organization needs to change and rebrand. He works to be open and explain things rationally. But, at the end of the day, he tells me he will never get 100% agreement in an organization as complex as Rotary. So, he works to compromise.

Throughout our interview, Hewko's experience from MCC comes through several times. He tells me,

> I think for nonprofits to be successful, you need to incorporate private sector principles. I know historically, there's always been this us-versus-them concept. I know when I was at MCC, I always felt the private sector is not the enemy. They're like the solution. Firstly, they've got all the money. Secondly, in the MCC context or the international development context, when you get a serious multinational, say, coming into a country with foreign direct investment, that's development.

After fifteen years with the Peace Corps, I am not completely convinced, but he goes on to say,

> [The] private sector, I think, plays a huge role…and needs to play a huge role in making [development] happen. Our partnerships have to play a huge role in making [development] happen. Look at polio; we couldn't go it alone, WHO [World Health Organization] couldn't do it alone. Gates joined the effort about ten years ago and has

> been a phenomenal additional partner. Partnership is absolutely critical. Any NGO [nongovernmental organization] who really wants to make big scalable impact, you've got to partner. You've got to partner.

Point made; I think to myself.

Another point Hewko makes is about the importance of monitoring and evaluation. His opinion is extremely valid for iconic nonprofits that confuse an impactful story with measurement and results. Hewko tells me, "It's all about also measurable results and metrics. First of all, donors are expecting that. It's a huge competition out there for funding." Hewko tells me donors want nonprofits to prove a return on their investment. "I think most nonprofits now will need to be incorporating private sector principles into their activities. Measuring their results, measuring their impact, measuring the M&E [monitoring and evaluation] piece is going to be huge," he insists.

At Rotary, he has implemented these same fundamental changes into the way the foundation gives grants to the clubs. While Rotary will fund in six broad areas, they insist the project must be sustainable. Measuring the results and reporting the impact are required for the grantee. The foundation also now requires a needs assessment with every community project. Hewko explains,

> You have to have done a needs assessment with the community. You're doing a water well, you've got to say you've done the needs assessment. You have the right technology. Are they going to be able to maintain it afterwards? Where will they get spare parts? Is there going to be expertise to fix it, even if you had spare parts? All the kind of standard stuff.

As we get to the end of our interview, I ask him for some closing thoughts and he again focuses on the need for nonprofits to become more like a business with measurable results and impact. He emphasizes,

> I think those are the trends that all of us in the nonprofit space are going to have to really move to: partnership, closer collaboration with the private sector, and adopting private sector concepts and principles into how we operate. Because donors are asking quite frankly. It's a huge competition. Those that demonstrate greater value for money are going to get the funding.

When I spoke to Hewko's colleague and asked him about some of the biggest changes that have taken place at Rotary, he was very insistent that Hewko had done more for the relationship between the board and the staff than any previous leader. He said,

> He has elevated the status of the professional staff in the eyes of the board. Without a question he has been relentless. And in some instances [he has been] ruthless in terms of his lack of tolerance for letting the volunteer leadership position us as if we're to be looked down on. And I'm not saying that was a prevalent position, but it was present enough to where having it addressed really has made a big shift in the kind of relationship here. I don't think, quite frankly, I don't think he gives himself nearly enough credit for that.

When speaking to Hewko's colleague, I noted that Hewko had not ever mentioned this to me when we spoke about his leadership and changes at Rotary. He quickly responded saying,

> He's an idiot for not recognizing that and giving himself credit because it's huge. But it could be, you know, that he's put all that energy into it, and it doesn't necessarily impact him directly. But it impacts everybody else underneath him in a huge way.

As I leave Hewko's office, I walk past an exhibit on my way to the elevators. One wall of the exhibit has photos of the Rotary boards of directors from each year starting in 1905. Across the 115 photos, there are slight changes such as a female or person of color beginning in the 1990s. Rotary was forced to begin accepting women after a Supreme Court case ruled "that the Constitution does not protect sex discrimination by most all-male private clubs, in particular those that are often used for business purposes or by nonmembers" (Taylor, 1987, para 2). In glass cases, next to the wall of photos are mementos of historical moments in the history of Rotary around the world. I walk towards the elevators to leave the floor and notice the more than 200 flags from every country where Rotary has clubs. I think about Hewko saying,

> It's an aircraft carrier. It's not that easy to change it. But once you change it, man, you can't stop it. Look at polio. Once they got on to polio, boom! It's unstoppable. That's the beauty of our organization. It's big, it's unwieldy, it's complicated, but man, once you get it going, it's hard to stop.

Gail McGovern-American Red Cross

In nonprofits, it's all about leading from the heart, as well as the head, and it's all about the power of your ideas.

—Gail McGovern, President and CEO, American Red Cross, August 21, 2019

Gail McGovern is an icon in the world of nonprofit leadership. As President and CEO of the American Red Cross, she leads one of the most well-known organizational brands, and one of the largest nonprofit organizations in the world. With the number of natural disasters increasing, I cannot imagine the documents on top of her desk, the trips in her calendar, and the letters in her email inbox. For these reasons, I was surprised when Gail herself wrote a note back to me, only two days after I sent her a request to take part in my research. After a bit of back and

forth with her scheduler, we found a date, several months later, for an interview on the phone. On the date, at the exact time we had scheduled, my phone rang, and McGovern began to tell me the story of leading rebranding and innovation at the American Red Cross.

McGovern graduated from Johns Hopkins University in the first class that was coed. She was one of 90 first-year female students who entered the university in September 1970 with 1,900 men, breaking a 94-year tradition (Johns Hopkins University, n.d.). McGovern tells me this piece of her education "sort of got me ready for a lot of different things that I encountered during my career." Her career started at AT&T as a computer programmer. She describes it to me as "programming and languages that were relevant when the dinosaurs roamed the earth." After 24 years with AT&T, she was a senior officer running the $26 billion long-distance business. "I loved every minute of it. It was an amazing ride" she says. But, feeling like she had many more years to work, and reporting directly to a brand-new CEO, she decided to answer calls from search firms.

She got a call from Fidelity Investments and thought, "This is going to breathe new life into me." The area of financial services was not a field in which she had any experience. She tells me she did not really understand it. But she made the leap anyway and was at Fidelity for four years as the president of their personal investments business. Then the world began to shift, and McGovern explains,

> Then all of a sudden, newspapers were littered with stories about Enron and WorldCom and all this corporate malfeasance and I started getting itchy to do something more relevant. I got in my head that if I could touch tomorrow's leaders, that maybe I could have an impact on what was happening.

Once again, she shifted her career. This time to academia and where she taught marketing for six years at the Harvard Business School. She comments,

> Honestly, I think those students taught me more than I taught them. They were really smart and scary so. I loved it. I learned a lot. I've always been intellectually curious, but I was learning a lot of things. I had marketing roles in my career, but this was the leading-edge stuff at the time. So, I learned a lot more about marketing. I probably would still be there today if I didn't get a call from a search firm.

Around this time, she was "getting itchy to actually run something again," but not in the corporate world.

> I was enjoying Harvard, but this little itch, this siren song, was kind of getting louder and louder. When I got the call, I thought, 'Oh my gosh, if I can have the privilege to be part of this iconic organization that does so much good in the world, it would be such a blessing and a great capstone to my career.' So, I said, 'yes,' and they said 'yes,' and I've been [at the American Red Cross] for 11 years.

After hearing this comment, I point out to McGovern her statement sounds like she got married. She responds,

> You know what, I never thought of it that way, but it is more true than you can imagine. As an aside, I used to give speeches on work-life balance because I had really figured it out. I raised a child while I was an officer at AT&T. I really was good at this. Then when I joined the Red Cross, it all went out the window. It was a bit of a marriage.

She adds,

> If I were perfectly honest with myself, I am in love with this organization and work feels like life. And I'm blessed because I am married to a man who is so supportive. He had

> monster jobs and a huge career himself, and he's now retired and he just loves that I love what I'm doing. No kids at home so there's not that to give me work-life balance. So, I'll just keep doing it until I stop loving it.

Clara Barton founded the American Red Cross in 1881 with the mission to serve people in need. In 1900, the organization received its first congressional charter. Today they continue to supply services to members of the military and their families, as well as work on disaster preparedness and response in the United States and in other parts of the world. Most Americans have had some experience with the Red Cross: taking a first aid or swimming class, giving or receiving donated blood, or receiving assistance before or after a disaster. The Red Cross has been working beside the U.S. military, organizing blood drives, and offering training courses since the early 1900s. Today, they are still running these same programs, albeit with updated methods and strategies (American Red Cross, 2019a). The mission of the Red Cross today is to prevent and alleviate human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors (American Red Cross, 2019b).

It is easy for me to tell McGovern was once a university professor. Even through the phone, I felt like I was learning from her and was eager to hear more of what she had to teach me.

> I've always believed that organizations really can learn to embrace change. I've always believed that. Where people start flipping out is that there's too much uncertainty. I feel like if you communicate the change and why you're making that change that people will follow. But if you come out and say today, 'Tada, here's my new work structure,' or 'Tada, here's our new strategy,' and people didn't feel a part of it or get to kick the tires or roll around in it a little bit, then change management becomes a challenge

she begins to tell me with excitement.

> To tell you the truth, when I walked into the Red Cross, we were facing some pretty severe financial challenges. I had never experienced a turnaround that big. I've had big jobs, but I pride myself on picking up something that is running fairly smoothly and getting more out of it. I didn't have the luxury of that [at the Red Cross].

When I spoke to McGovern's direct report, she spoke about the enormous challenges that existed at the Red Cross when McGovern joined the organization. She explained McGovern's process in this way,

> She just started tackling all of it all at once. I wouldn't say in a scattershot way…She had a much broader view than I think many CEOs might have had. She wasn't just saying, 'Oh, we've got a broken financial system, I need to focus on that. And I'm going to ignore everything else until it's fixed.' She really saw it as a need to invest in fundraising and invest in our brand, so that when we do wake up out of this financial crisis, there's something there that matters to people and our mission is strong, and our programs are strong. And so, she really tackled it all at the same time. That's kind of her approach. Still, I would say that nothing is off limits, because she just sees how these things connect. And she knows that they're all building to a bigger something. So that's one attribute she has that mastered better than anyone else. She does not get distracted by things that might not be as relevant to the task at hand. It sounds like I'm saying she does everything all the time. But she's very focused on the things that are going to really move the needle. And she really focuses on those things. But it's always a lot of things. And the Red Cross is a very complex place. It's a very unwieldy place sometimes. But that doesn't scare her. It kind of energizes her. So, she's able to really make changes in a lot of

> ways. And at first, I think that the board was scared. And I think the employees were scared that she was biting off too much. And there have been a couple of times where she's had to wind it back just because people weren't ready for it. And it was just a little too much at the same time. But it wasn't because she was scared or limited.

McGovern has made changes in how she approaches leadership from her days in the private sector. She has adjusted to the nonprofit sector by learning to "lead from the heart." She explains it to me this way,

> What I learned, which I believe is very characteristic for nonprofits, not-fo-profits, is everybody is there for the mission. If you can explain what you're doing, but also why you you're doing it, and if the why is always through the lens of the mission—at least speaking on behalf of Red Crossers, they will do just about anything to make sure that we can fulfill our mission. Change management at a nonprofit, if it is done through the lens of the mission, you can galvanize whole groups of staff and volunteers. But it has to be through that lens. In corporate, you can put down a business case and say, 'This is why we have to make the change,' and people go, 'Yeah, that makes sense.' You're appealing to their head, not to their heart. In nonprofits, it's all about leading from the heart, as well as the head, and it's all about the power of your ideas. We have 372,000 volunteers and 20,000 staff. Those 372,000 volunteers, you can't say to them, 'Hey look, I'll give you a bonus if you do this,' or 'I'll cut your salary if you don't.' They are there just because of their hearts.

McGovern has so many stories of leading innovation, change, and rebranding after eleven years at the helm of the American Red Cross. She tells me,

I think a defining event happened—it was like a personal transformation. We were going to make sweeping changes to our governance. We had 720 chapters and each chapter exec reported to their local board. We acted like a federated nonprofit, even though we're one 501(c)(3). These chapters did what they wanted to do. The local boards were the ones providing oversight, but really, the fiduciary responsibility of the organization was the Board of Governors. On paper, the local boards reported to the Board of Governors, but there wasn't a single governor that had met with any of these local chapter boards. So, they were almost like franchises. If that makes sense. Because of that, there was no consistency on what the mission was, or on mission delivery. There was no yardstick for who was delivering the mission well, or who wasn't, and we had a big operating deficit. There was just tons of duplication because every CEO in those chapters had a CFO, and they had a fundraising team, and they had somebody who responded to disasters. It was just so much overhead duplication that was unnecessary. They all had their own email systems, their own websites, their own bank accounts. Honestly, I could sit down and do a back of an envelope and close the entire operating deficit we had, which was over $200 million. It was incredible. It was $200 million. Because we were running in a deficit, we were taking out loans, and we had a huge amount of loans. We tapped out all our lines of credit. That's what it was like when I walked in. When you think about it, there's 720 people who are kind of the masters of their own fate and they had no desire to change that, coupled with the fact that they figured that if there was a deficit, it was probably a headquarters issue. Because it looked to them like they were breaking even, even though they weren't. Because we kept a lot their expenses at headquarters. I was going to have

to convince them that they wanted to do this. Because even though I could do the math on the envelope, just saying, 'Okay, so here's what we're going to go do,' was risky.

McGovern adds,

By the way, one defining moment is when I came into the board with my estimates and said, 'See, we can close this thing in two years.' I said, 'So I need approval for this.' It was basically gutting these chapters and getting rid of the duplication and bringing it all together in one group and headquarters and doing it once instead of 720 times. The board said, 'Gail, they're going to eat you alive. You just can't do stuff like this.' I came back out of that meeting, thinking, 'Okay, I kind of have to ignore the whole change management thing. I've got to go out there and sell this or else we're going to lose people, lose good people.' Because, a pleasant surprise when I joined the Red Cross is how smart everybody was, and I didn't want to lose this team.

She continues the story with what she refers to as a defining moment:

We brought together thirty chapter execs. The way to solve this thing was pretty obvious. It wasn't rocket science, but we gave them flip charts and magic markers and said, 'There are six rooms out there. Form six different breakouts. Pick whoever you want to work with and come back in a day and a half and present to us how we're going to save the Red Cross.' They came back, all six of them, with very similar solutions. Then we brought in another 50 [chapter execs]. They kicked the tires and they came back with even a better set of solutions, and we fine-tuned it. Then the defining moment was, now we're going to bring 160 of the largest chapters together and…

As McGovern seems to be getting to the climax of the story, she says, "No, wait, I skipped a big step." McGovern tells me she sent out an email to the organization's approximately

300,000 volunteers from her address. She recalls her thinking on this decision, “Since my whole experience is in the for-profit world, [I thought] people would skim it and delete it because they would think it's a foregone conclusion. But I got 10,000 responses.” The data from these responses was prepared in charts and graphs for McGovern to present to the 160 chapter executives. Then the story continues as McGovern decided how to best communicate with this group:

> The night before, there was a reception. I could tell that this group of 160 people, even though a ton of them had put their fingerprints on it, were very unsure of [our proposal for changes]. They didn't know if they trusted me. I didn't seem like one of them. I came from this for-profit world. I realized that I had to talk to them in a different way than I thought I was going to. That night, I went on a whole bunch of their websites, because there were a lot of them and I got up and I just spoke from the heart. It was an out of body experience for me because all I kept thinking is, ‘Gail, you sound so cheesy. You just don't sound like yourself.’ But at the end, I got a standing ovation.

After telling me more details about what she said that day, she finished the story by saying, “That was my defining moment; the meeting in San Jose, where I got up and I think I demonstrated that like them, I had the mission in my heart.”

McGovern’s story displays the importance she places on people and communication in leading change. Her direct report also emphasized these themes when I asked about the tools McGovern used to lead change:

> Communicate, communicate, communicate, and communicate smart. When we are sick of communicating, we just do it again. We tell them what we know. We tell them what we're doing, when we're going to know more, and we tell them when we know more. It's

> constant. So overcommunication is a tool she uses. And the open inbox is a signature of Gail. Everyone is open to contacting her about anything. And that sends a message that she's approachable. She cares about you. And you know, for a volunteer organization, that means a lot.

When I ask McGovern what "leading change" looks like when she is in the act, she at once begins to speak about her team.

> If you came into my office and we were all sitting around a conference room, you would see the most extraordinary chemistry. Lots of arguing because there's incredible diversity of thought. Attacking ideas, but not each other. Tons of humor. This is the funniest group. Tensions are diffused by humor. No one feels personally attacked, but they feel like their ideas and their thoughts have changed. They treat me like an equal because so many of them know me or have watched me over the last 11 years and they know there really is no boundary and push back. The thing that scares me is when you're leading, and no one says, 'That's the dumbest idea I've ever heard,' because they are all sycophants. That's the worst position a leader can be in.

I agree with her and she continues with another story about admitting she was wrong in raising the price of first aid training. At the end of her story, she sums it up, saying:

> If you were in my office, you would see a group that will dare to try something new and admit when it was dumb and debate everything and there's always a lot of laughter. And the other thing is because they like each other, they come into the room and they deliberately bring unfinished business. It's a wacky chemistry and one that I have never had the privilege of being a part of before. It's no hidden agendas, I should say, and a team that supports itself.

At a later point in the call, McGovern goes back to telling me about her team, saying:

> When you're a leader, you really only have two levers. One is making sure the organization is doing right, reputationally, and staffing. If you asked me what has been a success factor for me, and by the way, I've made a zillion mistakes. Raising the price of our training is just one example. You make a mistake, you course correct, that's kind of been what I do. But the one thing I am like a maniac about is staffing. I leave a vacancy open forever until I get the right candidate.

In rebranding the American Red Cross, McGovern says the organization has learned a lot by moving more into social media and information technology:

> [Social media] has become a tool, not only to appeal to broader generations, but it's also become a force for good. When we have a large disaster, we have a disaster operation center which becomes kind of the heartbeat of everything we do. We now have technology that uses geospatial satellite platforms to be able to see exactly what's happening on the ground. We overlay on that where our feeding trucks are, we overlay on that where our shelters are, we overlay on that where we should be distributing bulk supplies. This thing is a gamechanger. We've been using it for about two years.

She continues:

> Lately, we have embedded our social media team in the disaster operation center whenever there's a disaster. Because the other thing we started overlaying on that view is hot spots where we're getting lots of social media. When I say we, not just our feeds, but we use these outside vendors that can track sentiment and show us where there's anxiety and overlay green, yellow, red on top of our maps…Usually social gets so snarky and the trolls come out and it's like you can't stamp out the fires fast enough. We've gotten to the

> point where during these big storms, we're 96% positive or neutral on our Twitter feed, which is kind of remarkable, given how wacky it is out there. I think that social has been a huge tool for relevance.

Offering more real examples of how the Red Cross has rebranded, she says:

> Using local media and local online presence has really elevated the awareness of some of the things that we do with our mission. It's a combination of traditional media, social media, and attracting youth to volunteer as well as join the Red Cross. We now have a college campus program. We have a leadership development program where we're taking young people and teaching them leadership. I would say that, and plus we have a celebrity cabinet that can appeal to you. Just keeping our message real is a big tool.

The brand of the American Red Cross has always been neutral and nonpartisan. This aspect of their work is of immense importance to McGovern, as well as the staff with whom I spoke. McGovern says:

> Embracing neutrality is hard to do when the country feels divisive, but I take great comfort in knowing that our country is generous and resilient. I see people in our shelters that bounce back, which is a miracle in and of itself. I'm actually glad I'm in this position from that perspective and a whole bunch of others.

Following on this point, McGovern's direct report said:

> Our brand is a very big piece of our story. And [McGovern] is a humanitarian at her core, she embraces the principles of the Red Cross movement, which is very much neutrality, and you know, we're not political, we can't get into anything controversial or political, because we have to be able to deliver our mission to everyone. She really takes those principles to heart, and she's able to really focus on that, it always comes back to the

> mission and what the Red Cross should be doing. And, I feel lucky that she found the Red Cross, and the Red Cross found her. And I think that's echoed by anyone who interacts with [the organization]. They just all know that she's not just another CEO.

As I did my research on McGovern, her impact on society and the world is all over the internet. There are a multitude of interviews, articles, media, and press about her leadership lessons and stories. She tells me:

> Honestly, if I could go back in time, I probably would have [led more from the heart] in the for-profit world. I was always a kind boss, at least I think I was, but I never tried leading from the heart. I worked for two iconic companies that were making a difference in the world. One was connecting people to the people they love and the information that they need and the other was making people's financial dreams come true, putting kids through college, helping people retire, but I never really approached work that way.

At the end of the hour, I let McGovern know we are out of time. She finishes our call by saying, "When it comes to revitalizing a brand, there's also protecting that brand and making sure every one of your actions is true to the brand. There is my HBS lecture for today, I guess," and then she asks me to get in touch for coffee the next time I am in Washington, D.C.

Lisa Sherman-The Ad Council

It's a journey. We're still on the journey.

—Lisa Sherman, President and CEO, The Ad Council, July 16, 2019

Please see supplemental video file "Lisa Sherman."

The Ad Council's offices are in an unassuming building close to Grand Central Station in New York City. Coming into the city on the train from my home in Connecticut, the awe of the city never ceases. It makes sense to me the Ad Council's headquarters would be in New York

City. However, you never know the organization is there until you get off the elevator on their floor and experience being in the Ad Council world. In the entry, floor to ceiling, hang Smokey Bear hats in a rainbow of colors. The receptionist encouraged me to put one on and take a photo, to post on my social media account. Cultural and manifesto statements cover the walls, doors, and elevators, telling visitors 'Together we make progress,' 'Where creativity and causes converge,' and 'Where media meets message.' There is no question that you have found the right place stepping off the elevator.

The receptionist asked me to sit in the waiting area where I watched a milieu of Ad Council PSAs projected onto the wall beside me. Other than these powerful images, the room is stark, bare, and industrial, forcing your eyes to stay on the reel of messaging meant to create awareness and change behavior. No one in the United States who grew up watching television can claim not being influenced by at least one advertisement created by the Ad Council. From McGruff, the crime dog, teaching us about crime prevention, and the crash test dummies, encouraging the use of seat belts, to Iron Eyes Cody, shedding a single tear about pollution, and Smokey Bear, warning that, "Only you can prevent forest fires," Americans have learned to adopt new social norms through the public service advertising of the Ad Council.

At the appointed time, an Ad Council employee invites me into a comfortable conference room with puffy chairs and couches, where I meet Lisa Sherman, President and CEO of the Ad Council. At 61, Lisa looks much younger than she is. She has a beautiful, warm smile that goes along with the comfortable feeling you get from being in her presence. On the day we meet, she wears a white denim jacket with a casual, blue summer dress. As seen in all the photos I found, her blonde hair is worn down and framed her face. She sits across a coffee table from me at the

end of a couch. She asks about how my research is going before we begin the interview about her leadership and the Ad Council.

"Sherman's career trajectory began behind the register of her dad's Philadelphia shoe store, where, as a teenager, she pinch-hit on Saturday afternoons, watching her father chat with customers and quickly put them at ease" (Bitts-Jackson, 2018, para 3). When I met Lisa, she told me, "My dad always said, the harder you work, the luckier you get." She attended Dickinson College in Carlisle, Pennsylvania, studying psychology and economics while playing basketball and lacrosse. A teammate's father pointed her to a job at Bell of Pennsylvania (Bitts-Jackson, 2018). Lisa describes her career before the Ad Council as "30-plus years in media, marketing, and advertising on all sides of that business. I ran brand management at the company we now know as Verizon. I was there for a number of years, many years." She went on to work at Viacom, "where I was hired to launch one of their new cable networks." The channel was LOGO TV, aimed at an LGBT audience.

Lisa recalls:

> I loved the field of communications generally, broadly, but I've always sort of been passionate and purpose driven around just making the world a better place. And so, I found ways to do that in my career through projects I could work on within the companies I worked with, or outside. I was on a number of nonprofit boards and sort of scratched that itch in many different ways but always was very involved. I like to say that my DNA was wired with this purpose-driven approach to life.

Lisa Sherman is the fifth President and CEO of the Ad Council since its founding in 1941. In November 2014, she succeeded Peggy Conlon, who retired after fifteen years in the

role. When she received the call from the Ad Council recruiter, she "felt like lightning went through [her] body." She describes her decision as being:

> The next thing that I have to do because it really would allow me to take all of my experience in the communications field and put it to use to make the world a better place as my day job, not just my side job.

Lisa tells me she is "lucky" to have gotten the job. "I knew I needed to have it, and I got it, and I've loved every day since. I can honestly say that."

Today, the Ad Council is the "largest producer of public service advertising" (Ad Council, n.d., para. 1). The mission of the nonprofit organization "is to identify a select number of significant public issues and stimulate action on those issues through communications programs that make a measurable difference in our society. To that end, the Ad Council marshals volunteer talent from the advertising and communications industries, the facilities of the media, and the resources of the business and nonprofit communities to create awareness, foster understanding and motivate action" (Ad Council, n.d., para. 2).

Sherman's mandate from the search committee and the board was "to think about how to take the incredible legacy of this organization and ensure that it will continue to be both relevant and drive impact into the future." When she began to think about how best to do that, she realized she first must understand what was already in place and stay grounded in the organization's mission. She explains:

> I went on a major listening tour, talking to lots of people here that are on the team, talking to board members, talking to our partners, and our sponsors. I had a few preconceived notions, but I really didn't want to assume anything.

Lisa's colleagues describe her listening tours as a significant part of how she makes decisions. As I spoke to them, they described the idea of a listening tour in this way:

> Lisa knows a million people. And if she doesn't know that person, she will find a way to get to know that person. She is incredibly curious. She will reach out to somebody to say, who do I need to know if this is the problem that I'm trying to solve? And then she'll set up her list. She will make sure she's adding new people to that conversation. So, it's collecting all of that information before she makes a decision. And she does that with the staff, too. She has an enormous amount of belief, trust, and respect for the folks on her team. And she really likes nothing more than when you're telling her something she doesn't know, completely opposite from a lot of leaders. And she loves to say, 'Tell me more.' And she's a people person. I think she really enjoys going out and talking and meeting people, you know, really spending the time. I think it requires a huge commitment. You know, everybody would love to be able to spend more time at home. But sometimes you have to really be on the road and put yourself out there and go visit someone where they are to truly grasp and understand where they're coming from, connecting versus being on the phone. And then she'll come back and share that information and say, 'Hey, you should really know Bob. Bob would be really helpful with X, Y, or Z.' And then she'll introduce us and then we develop that relationship with Bob.

Another of Lisa's team members added:

> That's been a great opportunity for us, and our colleagues. To get to know people we wouldn't have had a chance to get to know before, and really get a peek into how they're running their businesses and bring a lot of that back to the council.

Sherman is a leader who guides and empowers others to make their own decisions, represent the Ad Council and her, and trusts those on her team to be leaders in their own departments. She describes wanting her team to “spread their wings to their full capacity to tap their own strengths.”

Sherman inherited "an organization that was in such a strong fiscal shape" and "didn't have to start in triage mode." She points this out because she wanted to take some time and "really try and understand what's going on" and then formulate her ideas about how to move forward. Since that time, Sherman has not stopped leading change, innovation, and rebranding.

> In September 2018, the Ad Council announced a significant rebrand including:
>
> An evolution in how it works with corporate brands to address the country's most pressing social issues, an expansion of its content creation model, leveraging technological innovations that advance communications for social causes, as well as a new brand platform and visual identity (including a new logo). (Ad Council, 2018, para 1)

And, in July 2019, a few days after I visited their offices, the Ad Council launched its new strategic consultancy: Ad Council Edge. The new arm of the organization's business will "advise foundations, nonprofits, and companies on ways to inspire and engage the public around social change" (Ad Council, 2019, para 1).

The efforts around the rebranding of the Ad Council took 18 months before it was launched with a formal announcement in September 2018. Sherman’s colleagues describe her as “very strategic about who she brings into a project to make sure that it's successful moving forward.” In the planning and process for the Ad Council rebrand, the board was a key element in making it successful. Lisa and her team kept the board chair, executive committee, and a

designated subcommittee informed and brought them into the decision-making at every step of the way. The Ad Council's board of directors has 125 voting members in addition to two subgroups of past board members who have made significant contributions to the organization. Therefore, Lisa and her team had some of the greatest branding and advertising minds in the United States to call on for advice.

Everyone I spoke with at the Ad Council said there were naysayers in the rebranding process. Lisa used her effective communication and leadership skills to continue to move forward.

> We are in an industry that has gone through massive transformational changes and tons of disruption and it felt to me that we were still operating with a model that had been relatively unchanged. It wouldn't be fair to say it had been never changed. You can challenge me, but I think it was relatively the same as it had always been. We weren't leveraging, I don't think, the many tools that were now available to us by tapping into new digital and social platforms and influencers and new ways of creating content. We just needed to broaden our process. Because I think that while there is tons of disruption, I think it's been great for the Ad Council because we have more partners, more people that want to help us, more platforms to deliver messages to the right people at the right place at the right time and we needed to figure out how to harness that.

Later, she says, "It felt like it had gotten a little bit tired." She held true to her beliefs that "a brand's relevance is completely and directly connected to culture and cultural Zeitgeist. When you can connect those two, it becomes a place where people want to be."

As a strong and successful change leader, Sherman's collaborative style comes through many times over. One member of her team told me:

> I would say she is incredibly collaborative. It's not that she necessarily has the answer. I think she really invites people into the conversation very early, and is very interested in diverse perspectives, but also has a great vision, brings you along and helps to shape it by collaborating with her team.

Sherman confirms what her staff describe by saying:

> I also think that I am the kind of leader that—I think when you're about to do something like we were about to do, you sort of have to create the case for change. Like why would I do this? What's the motivation to change? I felt like I worked hard to try and continually reinforce the case for why we had to do this and what was in it for people. Because I believe that if I couldn't get people to buy into the why, I was never going to be successful at bringing enough people along so that it became our transformation, just not my transformation. It could never be my transformation. That's just the way I approach everything.

Additionally, she adds, "I'm very big on people taking personal responsibility and accountability," and I heard that point in my conversations with her team members. Breaking down the hierarchy and empowering her colleagues is a large part of how she leads.

"Culture, culture, culture, culture all day long" says Sherman when describing her own change leadership style.

> I think it's really paying attention to culture. Knowing that your team is the most important thing you have. If you don't have your team with you, you got nothing. You really don't. It's understanding how you engage them and take care of them.

Sherman believes that culture and team are essential to any change in any organization.

> I also knew, going in, having worked at a number of other organizations, that in order to drive change, which we definitely needed to drive, that you can't drive change without thinking about culture and how we evolve the culture of the organization. You might want to do things differently, but if you don't evolve the culture that is supporting the way you're working, it's never going to be effective.

The idea of values within a changing culture was a primary focus for Sherman early on in her tenure at the Ad Council. Sherman says:

> The very first thing we did was talk about coming up with a common set of values that we could all feel great about. Like what is the modus operandi of the Ad Council? What are the things we're going to stand for? How do we want to operate with each other? We did a whole set of things around values. We did a whole set of things around collaboration and teamwork, which were part of those values. As you start to unpack the values, it created more opportunities to really start to sort of try them on and start to live them.

She emphasizes the importance of culture in terms of the rebranding process: “I think a brand's relevance is completely and directly connected to culture and cultural Zeitgeist. When you can connect those two, it becomes a place where people want to be.” Her focus on rebranding was never just about a new logo. “If you just put out a new logo but nothing else changes and no one experiences you differently, you just wasted a ton of money and time.”

I believe Sherman leads from the organization’s values and models them constantly.

> You just have to be honest. You just have to be fully authentic. Whether you know the answer or it's a hard answer and you know it's not what anybody wants to hear, people want to know the truth and I think that really helps build the trust.

In a 2019 interview with Fortune Magazine, she reports hiding her sexuality from her coworkers for the first 17 years of her career while being out in all other parts of her life. She came out to the CEO as she was leaving the Verizon's employment resulting in the CEO making major changes for the LGBT colleagues she left behind. She describes the lesson being a mandate to speak your truth (Moore, 2019). It is her ability to lead from a place of transparency and honesty that has made her accomplishments at the Ad Council so successful. Moving "at the speed of trust" is a critical part of her decisions.

The most emphasized aspect of Sherman's change leadership and management is communication, being two-way, listening and speaking. Her colleagues spoke several times of Sherman being "such a good listener, and then being super clear on her communications." In our interview, Sherman mentioned the importance of communication multiple times, saying, "I think I'm a very good listener and I really want to hear what people have to say" and:

> I feel very strongly about the importance of communications and letting people understand … the reason why. This is where I think we should be going, and constantly communicating about that so people feel like they understand where we are in the process, even if we don't know exactly where we're going. Being okay to say, 'I'm not exactly sure. I directionally know this is correct, but we're going to figure it out together.'

Again, to make the point of how important this aspect of her leadership is, she said, "So a lot of communications. A lot of painting a big picture of a vision to get people excited. A lot of

listening, as I already talked about." There is no doubt in my mind that Lisa is open about what's on her mind and makes herself available to hear questions and concerns as they arise.

Towards the end of our interview, Sherman mentions the visual representation of change in the physical space they occupy in New York City. "As you know, so many things have changed I can't even begin to—like this office looks completely different." She asks me if I had ever been to the office previously and then goes on to describe how and why redecorating was important.

> We opened it up. It's consistent with our new culture. Coming at it from the brand side of marketing, everything a brand does has to communicate what the brand is. The minute there are in consistencies, no one believes the brand is for real. And so, if we're talking about being open and transparent, then your office has to be open and transparent.

I can hear in her voice this is important and understand from my own perspective that the visual identity of an office and the location of a nonprofit comes with challenges and questions. The way she explains her reasons for the investment is clear.

> We wanted to honor the legacy of the past, but make it feel fun and modern for today, and going forward. So, the branding around the office does that. Every conference room has an image and a word from one of our campaigns. Our Smokey hats there in the lobby, that is such an homage to the iconic campaign. The longest-ever-running public service campaign in history. It's amazing. You see those hats and people come by, they take pictures in front of it and they push it all over social and put the hats on. It's done exactly what we wanted to do, which is honor the legacy, but make it feel modern and contemporary.

Many times in our conversation, Sherman referred to being on journey. She is clear in her own mind that it has only just begun at the Ad Council and I have no doubt there will be much more innovation and renewal from her in the future. She says, "It takes a long time. The thing with this journey is it's never done. I think we feel great about what we've accomplished."

Jennifer Sirangelo-National 4-H Council

You have to be willing to take the risks because there will be risks. Making change, if it was easy, would have already been done.

—Jennifer Sirangelo, President and CEO, National 4-H Council, August 24, 2019

Please see supplemental video file "Jennifer Sirangelo."

The National 4-H Youth Conference Center looks like a boarding school to me. The multiple red brick buildings are on a large campus in the Washington D.C. metro area. Guest rooms, meeting rooms, and conference rooms used to host groups visiting the area fill many of the buildings. In the middle of the campus at the top of a circle drive is a large central building with four two-story white columns supporting a portico. At the very top of the portico, above the letters "NATIONAL 4-H CONFERENCE CENTER" is a beautiful, blue stained-glass window. At the center of the window is a four-leaf clover, each leaf holding a capital letter H, the logo of the organization.

I enter a large, greige, minimally decorated lobby. At the registration desk, I ask for the National 4-H Council staff person who has coordinated my visit. As I wait in the cavernous lobby, my eyes focus on an intricate, colorful mural that covers most of one wall at the end of the room. The painting is by artist Dean Fausett and commemorates the contributions of Mr. James Cash Penny to the organization with depictions of him and 4-H youth (Jefferson County Washington 4-H, 2009). On the left side of the mural are young people growing corn and

canning tomatoes, the center of the mural reflects 4-H as the program diversified in urban areas, and the right side reflects young people taking part in photography and playing guitar in the 1970s when the mural was created (National 4-H History Preservation Team, n.d.-b).

Off the lobby are two open rooms. One is a small shop selling goods branded with the four-leaf clover. The other is a small museum of 4-H history. Surprisingly, I choose to educate myself rather than go shopping. On one wall of the museum room hangs a timeline of 4-H starting in 1902 with "corn clubs" and ending on the other end more recently with science, engineering, and technology. Above the display is a quote saying, "dreams can become reality if many people work together and toward a common goal" from Kathleen Flom, a lifelong 4-H member and supporter (National 4-H History Preservation Team, n.d.-a). There are many other historical keepsakes that fill the room and remind me of my own years as a 4-H member growing up on a cattle ranch in central Texas.

Sirangelo's colleague comes to greet me and we go together into a large conference room where the interview will take place. She is careful to ensure the background for the taping is perfect with a U.S. and a 4-H flag behind the chair where Jennifer will sit for the interview. When Jennifer arrives with another colleague, she is exuding positivity through her bright eyes and friendly smile. She is wearing jeans with a black t-shirt and blazer. Silver beads are in the shape of the 4-H clover logo on the front of her t-shirt. She explains to me that this is one of her "uniforms" and later in the day she will change into her county fair uniform that includes boots. Sirangelo hands me a 4-H bag filled with branded gifts and asks her staff to find a silk scarf for my mother when I say she also is a 4-H alum. After her colleague takes care to ensure Sirangelo's blonde hair is in place and she correctly positions the flags behind her, we begin the interview.

Jennifer Sirangelo became President and CEO of the National 4-H Council in 2014 after working as the Chief Development Officer and then the Chief Operating Officer for eight years. She is an example of a rare nonprofit CEO who worked her way into the top job, promoted from within the organization. Sirangelo is the first female to lead the National 4-H Council. She grew up in Raytown, Missouri. In a 2015 interview she said:

> I am the oldest of four sisters, and I helped my mom take care of my siblings. Hard work is at the core of who I am. I was doing volunteer work in college when I discovered the nonprofit sector. I soon learned that I loved making good things happen for others and bringing opportunities to youth. (Tevis, 2015, para 3)

Sirangelo went on to receive her Bachelor of Arts degree in communications and political science from William Jewell College, a Master of Public Administration degree from Syracuse University, and attended St. Peter's College at Oxford University. Sirangelo told me that her passion for "58 million school-age children in America" led her to work in youth development organizations such as the Boys and Girls Clubs prior to coming to the National 4-H Council.

The birth of 4-H in the United States happened in 1902 when A. B. Graham started a youth program in Clark County, Ohio. The first club was "the Tomato Club" or the "Corn Growing Club." In 1910, with the development of the clover pin with an H on each leaf, the clubs became known as 4-H. Today the organization serves six million young people through school and community clubs, in-school and after-school programs, and 4-H camps. 4-H'ers participate in hands-on science, health, agriculture, and civic engagement projects. They can focus on a single area or try a variety of different programs while taking part in 4-H (National 4-H Council, n.d.).

Sirangelo explains to me how she is part of a three-part leadership group that leads 4-H into the future including the United States Department of Agriculture (USDA), America's Cooperative Extension System within 110 public universities, and the National 4-H Council. She is the CEO of the private, nonprofit National 4-H Council, a partner to the U.S. 4-H movement.

I begin by asking Sirangelo about her experience leading change and what stands out in her mind. She says:

> First, I believe you have to have a vision of what you see the future could be for whatever [organization] you're leading… Once that vision is in place, you've really got that, the next thing you need are allies. The first thing I do is work with the allies, including my board… When you work at the national level, we really don't serve the kids directly. We help and serve the people who serve the young people, at least, in our mission. Those allies are critical. So, ensuring that you're not alone, a lone ranger, but you start sharing and selling that vision to allies so it's a shared vision.

Sirangelo goes on explaining her process by saying:

> "Then once that first step is complete, the next one to me is really staying focused. It's very easy when you're a leader to have everyone bring you great ideas…. After the vision becomes shared, I then focus on maintaining that focus, which is not easy to do. Sometimes it means cutting other things out and making hard choices, which I've had to do, too." Later she tells me, "You really have to stay focused and know what your values are as a leader and for your organization. I find that being CEO, I am called on for [values] every day more than almost anything else. Small decisions, large decisions, big change management. So you have to set the values of the organization: how you value

> your customers, how you value your partners, how you value your employees, what you stand for, what you can let go. One of the traits is kind of having a compass, I guess, I would say, that you use and then you have to be able to articulate that so your team can stay with you on it.
>
> Her third point is to emphasize the need to take risks. She says:
>
> Making change, if it was easy, would have already been done. If it wasn't controversial, somebody else would have already tried it. But at least for me, it's required risk. Whether it's financial, whether it's your own reputation, whether this better work or we're all jumping off the cliff together, which I've had that feeling before, too.

In her experience leading change those are her three big steps and her experience leading the rebranding at the National 4-H Council outlines how she has followed her own advice. In her first step toward having a vision, she started with listening to the board and the affiliate leadership. Sirangelo says:

> It was our corporate board members that threw out big numbers and asked 'Why aren't we growing? Why don't we have a growth goal?' We had just finished our 10-year longitudinal study and showed amazing impact on young people. Our board was like, 'But we're only serving 6 million of the 58 million kids that are school-age in America. We should be doing more. We are large. We have infrastructure. We need to be serving more kids.'

Sirangelo knew that without the support of the affiliates in the field, the vision of serving more kids would not happen. So, she met with many of their visionary, local leaders and she asked, "Do you want to grow?" She explains:

> The answer they gave us was yes. So, we shocked and awed them with the census data about what today's kindergarten class in the United States looks like, its ethnic diversity,

> and its primary language. We realized that three years post that conversation, [those kindergartners] will be ready for 4-H. Were we ready for them when we looked at the changing demographics in our country?

It was this meeting that was a wake-up call for the organization. The group realized they wanted to grow but, as Sirangelo explains:

> We have to look different and act different into the future because our rural female Caucasian volunteers are not necessarily going to be the ones that are going to be able to relevantly serve over 50% of the young people in this kindergarten class that will be in 4-H in three years who are non-white. They may not be the right volunteers to recruit them, engage their parents with trust and things like that." Sirangelo believed she had her "marching orders" after that meeting. She describes the affiliate leaders asking, "Can you help us with the playbook? How have other states done it? What did that look like? What were the institutional supports? What were the things that happened?

They wanted the tools to make them successful in this effort.

This meeting led to a shared goal across the 4-H system. Sirangelo says:

> About four years ago, we made a bold statement that we wanted to reach 10 million young people by 2025 that reflect the diversity of America. Today we serve 6 million. We know we have a responsibility and that's a shared goal. Today, you will hear USDA say that. You will hear all the local affiliates talk about that. We have the kind of demographic plan of what that has to look like. We have a lot of work to do, but we have a shared vision.

Sirangelo goes on to tell me:

> That's how it worked. It was collaborative, is what I would say. At least for me, it's not like a single charismatic leader, a pied piper leading the way. My style is more to collaborate and to make it a shared vision, and it really works here in the 4-H structure."
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> She adds, "When you're the leader and the head, everyone wants to look to you for all the decisions and kind of default to you and I just don't let that happen. If that's what it is, it will rise and fall with me and that's not what I want.
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> When describing her day-to-day leadership style, Sirangelo says:
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> If you watch me, I'm with people. I don't make the change, the people that work here, the people in our local level, make the change. I spend all my time during the day with people. I learned that from some great leaders, too. So, whether it's out walking around, or most of the time, it's more focused in targeted meetings that are advancing what we need to do together and where they can get my mind share and focus on a few things…. For me, meetings are a means to an end and that is to achieve the goals of the organization and to invest in the people around the organization that are making that happen.

Sirangelo focuses on the executive team she has hired to ensure they have what they need to be successful. She describes them as extraordinary and spends most of her time with them and their direct reports. One of her direct reports, whom I spoke to later, described Sirangelo as "continually engaged and asking questions … challenging the status quo."

Sirangelo says the journey of building a new organizational culture is challenging. She describes it to me as "an organization that was kind of run as a family unit and I just run things a little more like a business. So yes, we will have a written strategic plan and everyone will have a performance agreement and we will have ratings of your performances and things like that. Not

everybody likes that." She talks about the progress watching some of her staff growing professionally and succeeding in the more structured environment she has built. But I sense the frustration in her voice when she says:

> It's been kind of interesting for me to learn how to manage and lead a cohesive organization. One of the ways we've done that is by really making sure we take time to focus on our mission, not just our work. Every year, we stop and we take a whole day, we pay everyone for the day. We have an in-service that we call Youth at Heart, where we keep youth at heart. We bring in young people from around the country that we've touched through our grant programs and some of our programs here on the campus, and we hear from them. We hear from the young people. They tell us what 4-H means to them. The impact it's had on their life with the programs that we've either funded or created. How they've changed their lives for the better. It's a highlight of the year for our staff. It really unifies all our staff from the housekeepers to the executive team. It's a very unifying day. That's one of the things we've done to build that culture and keep everyone focused on the young people. But it's a challenge. There's no doubt it's a challenge.

As Sirangelo and I come close to the end of our time together, I am impressed with her unbridled passion for changing the lives of the people involved in 4-H, millions of them, and her extreme focus on growing to impact even more. She emphasizes two strategies she believes have been extremely effective in rebranding 4-H: effective communications and a strong executive team. She tells me:

> I maintain a cohesive executive team. We ensure we are on the same page so there's no confusion. That's true both with our board, ensuring that our board and our executive team are on the same page and there's no disagreement there, and with our executive team

for staff and that there's no confusion there. Then that helps cascade down to our affiliates. An example of that would be staying really focused on our growth initiative. Our board really wanted that, made sure it was clear they really wanted to -- and we knew that we needed to increase our relevance in our marketing…. We knew that the number one thing from our market research, from our field studies, our field feedback and listening, that the number one thing was we needed to be seen as more relevant for today's kids, parents and investors. To do that, we had to tell our story in a new way. We knew that the fastest way to do that was to engage our alumni because they're the ones that understand and know and can see beyond maybe just what the local newspaper shows you with the picture of the cow and the kid at the fair, but our alumni understand the youth development that's happening. That those are just activities. Any of those things we do, whether it's a robot or photography or sewing or what your mom did, that's just activity. What we're really doing is positive youth development, and our alumni know that.

Sirangelo's firm resolve on this is clear as she continues:

[The alumni] have been amazing. That decision to use that kind of trajectory, so knowing that we wanted to serve more kids, that we would need more resources to do it, we'd have to be more relevant to do that, and our alumni being the fastest pathway to that relevance, both through their own stories, through their celebrity status, through their opening doors at their company, that's been the best decision that we've made. So, I would say that staying focused on that. Sometimes our board forgets. They're asking, 'Why are we doing…?' and I'm like, 'No, no, no, this is what we're doing.' Keeping

everybody on the same page has been really important. So that alignment is really critical.

Sirangelo then goes on to discuss her second strategy, communication. "Then I would say intentional communication, overcommunicate and then overcommunicate again" she says. One of the examples of this intentional communication style is the development of the growth strategy and vision. She tells me more, "Another thing we've executed in the last few years has been a board reorganization, which is not easy to do. In fact, we should write a case study on it because it went so shockingly well. It was pretty amazing."

> We had a board of 35, of which ten members worked in the field—the university system. They weren't really revenue-generating board members, they provided important input. And we knew that when we started our new strategic plan, we brought our board together and said, 'How do you want to support this strategic plan?' They looked at it and they said, 'There's one thing we need to do. We need to raise money. This plan is great and we can trust the program to our local affiliates, but they don't need our help with that. What they need is resources. How are we going to do that? We're going to have to have the right people on our team.' We had a retreat where I thought there would be a multistep process. That was not the case. There were four young people on the board in addition to eight or 10 people from our local programs. They voluntarily raised their hands at me and said, 'We think it's time that we go off this board or we find another way to be engaged. We need this board to have the people of influence and means that can support 4-H.' That was the catalyst, which I didn't expect to happen so quickly. But I think we'd build some trust and things like that she tells me.

She continues:

> Then we went through a process of—once we had that mandate, we were very careful not to seize the day and look like we were pushing away the important stakeholders of our local affiliates and the youth. We spent a year. We had a year-long communication plan and then a six-month transition plan. We walked through it with -- I did a lot of face time, not on the phone, literal face time, traveling across the country to be in the meetings to describe what was happening, the reason why, and to have opportunities for their feedback. I got great feedback, which we built into a new governance model that we then took back out in the second half of the year. We tested that model with these parts of the governance model: will these address your concerns? The answer was yes. It was all kind of centered around how our alignment between National 4-H Council and our affiliates could stay relevant and authentic when it wasn't just driven by personality; how could we build in the policies and the practices to make that happen. So, we built that in. Then there was a vote and voluntarily, the folks walked off the board. Our board is now down to 21 and their giving has increased by, I think, it's 10 times. Smaller board, ten times the resources.
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> Sirangelo's team member confirms her points when I speak to him, saying:
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> I think one of the other things that has been really important with Jennifer is that she has vision, but she also knows how to get there. Right? She understands that part of getting the right people around her. She's done a great job over the last several years, in terms of her time bringing a great team around her, hiring professionals and letting them do their jobs. And giving them good direction.

He also refers to the changes in the board, telling me:

> [There's been] a significant transformation of our board, from more of a governance type of advisory-level board to a corporate fundraising and marketing board. That's allowed us to really amp up our efforts in terms of focusing on what we bring to the table. As a national council organization, she's helped us to bring new board members on to change the board structure, to have a level of commitment from the board in terms of driving growth in the organization. And she's been a change agent. She's been key. That's why we're recruiting the type of board members that we have today.

Sirangelo has made many significant changes at the National 4-H Council. She has a lot of which to be proud in her time as CEO, and before. In closing our interview, she highlights:

> I was really proud that a year and a half later, last week, I was at a meeting with our affiliates and one of them used the example of the [strategy and vision] process and the communication process as how really great that was and could we repeat that for some other things that we're working on? Could we do that again?

Then, as if to be sure she does not leave it out, she adds, "[I believe in] giving time for the change to resonate, for people to have input into it so it's not a top-down, but there's ownership. And then sharing the success with them when it works."

Stacey Stewart-March of Dimes

It's a little bit of a poetic thing … that you have all these things happening right outside your window, but it's … a microcosm of all the issues that we really have to deal with.

—Stacey Stewart, President and CEO, March of Dimes, August 20, 2019

Please see supplemental video file "Stacey Stewart."

Finding the Washington, D.C. headquarters of the March of Dimes was tougher than I thought it would be. The building was under construction and the scaffolding made it difficult to

understand where I was. Fortunately, the staff member I coordinated my visit with had been explicit about crossing the temporary wooden bridge to find the front doors of the building. Once I made my way up the elevator, the March of Dimes lobby could not have been more modern, sunny, and beautiful. Video screens showed photos of women with babies, and a series of glass cases highlighted the long history of the March of Dimes from programs such as the Tuskegee Institute Polio Center to the PREEMIE (Prematurity Research Expansion and Education for Mothers who deliver Infants Early) Act, and many more. On one side of the glass cases was a large, gorgeous painting of a black woman encircled by butterflies and on the other side was a multidimensional, interactive display of historical photos and documents. In this brand-new office, the decorations highlighted everything in the traditional March of Dimes' color purple.

A colleague of Stewart's greeted me in the lobby and asked me to follow her to get set up for the interview. As we approached Stewart's office, we noticed she was with her makeup artist and paused outside of the office door. I was at once both grateful and impressed with the preparation and care she gave to the videotaped interview. In all the photos you find of Stewart, you can sense her attention to detail. She often wears bright colors and discreet, tasteful jewelry. Her black hair is short and cut close to her head emphasizing the beauty of her face. When Stewart enters the room and greets me, she is warm and composed, ready to tell me how she is rebranding the March of Dimes.

Before we started taping, I shared with Stewart my own personal March of Dimes story. My father, born in 1926, had suffered from polio as a child. During the Great Depression years, medical care for him was difficult for my farming and ranching grandparents. They turned to the March of Dimes for help. My father always recognized the March of Dimes may have saved his

life and worked to pay it back in his later years. Being at the March of Dimes headquarters that day, it occurred to me that I may not have been born if it were not for the organization's impactful work.

Stacey Stewart became the first Black American and the fifth President and CEO of the March of Dimes in January 2017. Stewart came to the March of Dimes from another legacy organization, the United Way. She describes her path to the role as nontraditional because she started her career in finance and banking. With every intent on going to Wall Street, she studied economics at Georgetown University, then received her MBA before ending up working on Wall Street in the late 1980s. She tells me:

> Hearing about this area of Wall Street called public finance, which is essentially doing a lot of same things to raise capital for companies but doing it for government. When I found out about that, I thought, 'That's perfect.' Raising money to build roads and bridges and do good. I had this real sense of that even though I was interested in finance and banking, that I wanted it to be towards public good. That theme is consistent throughout my career.

After a brief period at Merrill Lynch, a recruiter contacted her about a role at Fannie Mae, then known as a private company with a public mission. The mission of Fannie Mae to supply resources and capital for people to buy homes or rent affordable housing attracted Stewart and she worked there for 17 years, half of that time with the company and half as president of the Fannie Mae Foundation. She left Fannie Mae to lead United Way's global impact efforts across 41 countries, then went on to become the United Way's United States President with more than 1,000 local United Way organizations across the country. After more than seven years at the United Way, the March of Dimes recruited her for the top job.

> I thought this was such a great opportunity to come to an organization that has done so much in the country. March of Dimes is one of the only organizations on the health front that has actually tackled a really big public health crisis and solved it. Your story around polio, your father's story around polio, the fact that we have people whose lives have been saved, or we've eliminated an entire disease, not only from this country, but essentially from the world, but for access to the vaccine, it would be virtually all eliminated around the world. I thought it's such a great opportunity to lead an organization that has that kind of legacy. Now working on other important issues that I really care about in health, especially around maternal and infant health.

describes Stewart about her decision to take on the role.

Franklin Delano Roosevelt founded the National Foundation for Infantile Paralysis (NFIP) in 1938 as polio was on the rise. Eventually renamed the March of Dimes, after the fundraising efforts, the Foundation shifted its mission from polio to the prevention of birth defects in 1958. "This choice was in keeping with a continued focus on disabilities and disorders appearing in infancy and childhood" (Rose, 2010, para 4). Shifting again in the 1970s, the organization's mission began to integrate the problems of premature birth and low birthrate, too. In 2005, the March of Dimes formally added prematurity to its mission statement (Rose, 2010). Today, the mission of the organization is to fight for the health of all mothers and babies.

The March of Dimes is organizationally unique because all of their chapters are under one 501(c)3 umbrella. From Stacey's vantage point and comparing it to the federated model of the United Way, it makes things easier. She explains:

> It's still not easy to create change across a pretty broad national organization, but it's less complicated if you can sort of set strategy, get everybody on board, everybody then has

> responsibility to execute, and we can all come together as one team. Federated systems have a lot more power. At the local level, there's a lot more empowerment, which is really good. But it doesn't necessarily mean that there will be more alignment, which makes things challenging.

She goes on to explain the challenges of the federated model of nonprofits:

> I think, especially, when you're trying to move and become more nimble and react to change in a changing environment, when you've got to go through a lot of extra hoops to get buy-in and to get people online around the same direction, it can be really hard. And you'll never get everyone. So, you're always trying to figure out what's that tipping point of how many people can I get, and still kind of move things forward. I loved that challenge. It wasn't something that I was frustrated with or upset about. It was just a different structure. You require a different kind of leadership skill.

When Stewart recalls coming to the March of Dimes, she describes the need for fixing the financial house and renewing the relevance of the organization.

> I think what I found when I came to the organization, and it was pretty obvious from, one, looking at the financial statements and then, two, sort of observing the organization from the outside looking in, it was pretty clear the organization had kind of lost its ground in terms of people's public awareness, people's understanding of the organization, relevance in kind of the world of philanthropy and nonprofit. I think a lot of people were unclear about the role of March of Dimes and even what we were doing, what our work is all about.

Like other legacy nonprofits in the United States, the March of Dimes is well-known by older generations and defined by what they were many years ago. Most young Americans only

study about polio in history books, and do not see the relevance of the organization to their lives today. In addition to the financial challenges, Stewart had to:

> Really think about what are the steps that we're going to need to take to actually grow and build the organization. Not just in terms of revenue, which is really important, but also in terms of impact and relevance and really making a difference for moms and babies.

Stewart found herself leading an organization that was inward facing and not assessing the external factors influencing their impact. She offers several examples saying:

> We weren't looking at really taking in and responding to demographic trends and demographic changes in the country. We weren't thinking about technology and the use of technology and social media and smartphones, and how that is influencing how people want to be engaged and give. We weren't thinking about even how we were entering a world in which a lot of young people do want to be very involved in changing their world and their environment, and how do we show us as a cause that people can really get their arms around?

Stewart thinks back and describes how it has been a process. She has encouraged her team to think in terms of iterative improvement over time, rather than taking longer to ensure completion and perfection before implementation.

Upon arrival at the March of Dimes, Stewart had about 45 days to cut $30 million in spending from the budget. In doing this exercise, she asked herself, “How do you do that with creating the minimal impact on people and also the minimal impact on things that were going to produce the most value for moms and babies?” She took the opportunity to find inefficiencies within the organization’s operations. Recalling the process, she says, “I can remember looking at things like all of the repetitive and duplicative processes,” and “If we just stopped doing these

things and do them very differently pretty quickly, we can probably cut out a lot of just inefficiently spent resources and begin to get the organization more streamlined around still doing effective work, but doing it better."

In describing the changes and rebranding at the March of Dimes, Stewart says they are "really remaking the organization." She has led the organization to restructure some of the inner workings of the organization, relook at the logo and brand positioning, as well as their strategy. She describes the road ahead, saying:

> The reality now is this organization was really started very differently than what we're trying to become. In many ways, what we're doing now is really remaking the organization to be the organization that we really think we need to drive better outcomes for moms and babies.

Stewart's staff confirm her belief that no area of the organization is sacred. According to one of her direct reports, Stewart believes that just because the organization has been doing something a certain way for many years, does not mean it is the best way to do it in the future.

Stewart's rebranding leadership started with the question "Why?" She was "gifted" Simon Sinek to work with the organization on their process. Stewart tells me:

> The idea was, before we rebrand ourselves, let's understand who we are and why we matter. Why do we exist? Why should people care about us? Why do we care about us? What is it about what we're doing that matters? So we wrote this 'why' story that really started to—even before strategy, even before rebranding, reminding ourselves, even before we kind of settled on a vision statement and mission, we kind of said, 'Why do we matter? Why does our work matter?'

The answers to these questions helped her build the frame, and then focus on the mission of the organization, fighting for the health of moms and babies.

However, her biggest rebrand challenge may be balancing how to continue to engage and embrace the supporters that came from the days of the original polio mission with newer, younger audiences. She says:

> When we looked at our rebranding, we had to consider all these different things that the world has changed. Most of the babies born today are babies of color. The March of Dimes may not have always been seen as being in relationship with many communities of color, but in order for us to be effective in our work, we have to be seen as a trusted organization in all those communities. We have to be able to maintain sort of a multigenerational approach to our work and look at all those audiences and have them all see us as an organization that is meaningful to them.

Stewart quickly gathered a new executive team around her. She says:

> One of the most important decisions that I had to make was picking a really great leadership team. Everyone on the executive leadership team here is new, as of the last year, year and a half. Everyone that's reporting to me now is new to the organization, with the exception of two people who've been here a long time, but they're in different roles reporting to me now. I think the most important [leadership] trait is being able to identify the talent that we need for the direction that I felt like we wanted to go in so that I could have enough people around me to do the things that need to get done. I think that was the first thing.

Continuing to describe her leadership traits that make her reform efforts successful, she says:

> The second is that, and I say this because people say this to me all the time, that I have the ability to talk about a future direction in ways that get people excited and make people believe that yeah, this is right. This is what we need to do. I don't know how I do that, or I don't even know if that's true. I just know that people tell me that. I think that being able to create a vision and set a direction, and being able to not only articulate a vision but also make people feel like they're a part of it and they get really excited about, I think is really super important. Because I think if it's just me and my own will trying to do all these things, it's never going to work. It's got to be pulling people into it so that people feel like this is a place they want to be a part of. Then they'll be excited about being part of a team and the direction of the organization.

Thirdly, Stewart describes the need for a leader to be a decision-maker. She says:

> I think a lot of times when organizations get sort of stuck or they're in a problem and it's hard to see their way out, sometimes people might know where they need to go, but they're not willing to make the decision. In other words, they look at making a decision, going in a certain direction that might be different from where they've been, as a huge risk and a risk that they're not willing to take or they're too afraid of the repercussions or the ramifications of it, they're not sure it's going to work. So, they kind of spin in this indecision and indecisiveness.

It does not surprise me Stewart is a decisive leader and can be frustrated with indecision. She talks about how a culture of indecision can affect an organization for several minutes during our interview saying:

> I think one of the things that I have helped to bring, at least, I hope so, to the organization is just being more decisive. And giving people the opportunity to say, let's make a

> decision and try it. If it's not right, we can try something else. But I think what people don't also bring into that calculation is there is a cost of doing nothing. Sometimes a really big cost of doing nothing. So, if you just sit in this place of not making a decision to move in a certain direction, understand that that comes at a cost as well compared to the perceived cost that the new direction might create. I think just that ability to make a decision, be decisive, and kind of cut through.

Stewart imagines the highly democratized culture at the March of Dimes may have originated with Franklin Delano Roosevelt, painting a picture for me of fifty people in a room trying to come to consensus. To summarize, she says:

> I think the reality is that that's not how organizations move forward. That's not how things get done. At the end of the day, somebody is accountable. Somebody's got to listen and observe and take in all the information of what they need to know to make an informed decision, but then somebody has got to make the call at some point. Sometimes that's me. Sometimes that's somebody else. But being clear on where those lines are and where those places are has been important." One of Stacey's direct reports confirms for me Stewart's "ability to quickly assess a situation, including all related data, and make a decision.

Finally, Stewart highlights the importance of communication. Stewart emphasizes that during this period of change, she has needed to lead with both vision and execution, and elevated levels of communication.

> I think the other part of it is leading this kind of change really has meant that I have to constantly communicate, and not assume that anyone has heard what I said a month ago or two months ago or even understood it. Even if I said it to people five times, it may be

> only the sixth time when they actually understand what I mean. Sometimes I'd say things over and over again to the point where I'm tired of hearing myself say it. Then I say it the sixth time, and people's eyes light up like, 'Oh, I get what you're saying.' I'm like, 'Yup!' And they will hear it as if it's the first time I've ever said it." And, she continues, "The last thing I'll just say about that, too, is that when change happens, when you're in the midst of it, you're looking at what happened today and you're fully aware of what was happening a year ago or two years ago. But when people are not in it every day, the way you are, people haven't seen that movie. So sometimes you have to replay the movie for them. I think a lot of times we underestimate the power and the value of communication and repetitive communication when it's important, and keeping things simple.

Later in our interview, Stewart comes back to the importance of transparency, honesty, and communication saying, "I think that constant communication was a part of building the trust and people feeling like, 'Well, I may not like it, but at least you're telling me what the deal is.' That's pretty much all you can ask for. Just tell me the truth. I think that's what people really want. Most of the people want that today, especially." One of her team members tells me that Stewart's skill in "being consistently honest (even when the answer isn't clear) and transparent, in particular during periods of change" has been key to her rebranding success.

In my research prior to visiting the March of Dimes headquarters in Washington, D.C., I became aware of the fact that the board of directors made the decision to sell their building and move the entire organization from White Plains, New York, where they had been for three decades (Matsuda, 2017). Stewart described the move as an vital component to the rebranding process:

> The decision to move here wasn't about money, it was about how do we build a new culture, how do we attract new talent to the organization, how do we set a new chorus and communicate a new vision and a new direction for the organization. It was all wrapped up in one decision of moving our headquarters and selling that building [in White Plains]. That has been a key part of our transformation, I think, at every level in the organization.

In Stewart's mind, organizational culture and the office are intricately linked. She explains:

> Being in that office felt very much like we were tucked away from the world and we were nestled in this building that was sort of stuck in the past. What I also found was that it was almost inextricably tied to this culture that was very much stuck in the way things had always been.

As a leader who started her career on Wall Street in the for-profit world, Stewart is well-informed when she says:

> I think a lot of people on the outside who see us as a nonprofit organization see it as an organization that functions very differently from any organization in the for-profit world. I think that's the biggest misunderstanding that a lot of people have of what it means to lead and manage a nonprofit organization. The job that I have is exactly like a lot of jobs that other CEOs have. It's just that I have a different tax status. That's all it means.

David Yarnold-Audubon

What else would I recommend? Don't behave like a nonprofit. Be businesslike. Be clear about your strategy. Tell people what the outcomes are going to be. And then hold people to high expectations. Good people want to do good work and they're not afraid of working hard.

—David Yarnold, President and CEO, Audubon, August 29, 2019

Please see supplemental video file “David Yarnold.”

The national headquarters of Audubon are in the West Village of New York City. It strikes me as funny that the nonprofit organization set up to protect birds is in the city where the pigeon is king. From where I park my car, the walk to the building allows me to pass the largest murals in the city. My description will not do it justice. Painted on the side of a public school, artists Magda Love and Eduardo Kobra worked with high school students to complete the colorful, enormous, fantastic works of art. The murals are both full of bright colors typical of the two artists. Love’s piece displays a powerful woman with dark skin and three eyes surrounded by flora and fauna. Kobra’s piece displays the images of five immigrant faces and pays tribute to Ellis Island. Across the street from the school is a public pool where Audubon staff can see children swimming on summer days from their offices. Rounding one more street corner, I arrive at the building on Varick Street and make my way up to the 7th floor. It is October and decorations with cobwebs that have little stuffed bird toys inserted throughout cover a wall of the waiting area. In the same room hang large, beautiful photographs of birds and groups of staff are sitting in open space tables conducting their work meetings. On either side of the lobby desk, framed pages of Audubon’s famous magazine cover the walls displaying the beauty of the printed pages. And in a glass case is a copy of John James Audubon’s *Birds of America.* “Printed between 1827 and 1838, it contains 435 life-size watercolors of North America birds, all reproduced from hand-engraved plates, and is considered to be the archetype of wildlife illustration” (Audubon, n.d., para. 1).

Audubon’s roots go back to 1885 when George Bird Grinnell formed a society to protect wild birds from hunting for their meat or harvesting for their plumes. He named the organization after John James Audubon, famous ornithologist and artist. After Grinnell disbanded the

organization in 1889, Harriet Hemenway and Minna B. Hall set up the Massachusetts Audubon Society in 1896. By 1898, state-level Audubon Societies had been set up in Washington, D.C. and fifteen more states. In 1905, 25 independent Audubon societies joined together to form the National Association.

Today, Audubon's mission is to protect birds and the places they need, today and tomorrow (Audubon, n.d.). The nonprofit has 23 state offices, 41 nature centers, and 23 wildlife sanctuaries. It also works with 463 local chapters, each of which is an independent nonprofit. Audubon's state offices have a presence at statehouses, implement statewide programs, and provide leadership for the chapters and centers. They also enlist the advice of a volunteer board. The nature centers house exhibits and annually educate more than a million visitors on conservation, environmentalism, and preservation of birds. The volunteer-led local chapters drive the on-the-ground conservation work. Among the many activities they initiate are the flagship Audubon programs, the Christmas Bird Count and the Great Backyard Bird Count (Rangan, 2017).

David Yarnold became the President and CEO of Audubon in 2010. His path to the organization was unlikely, by his own description. During our short conversation, he tells me how his career led him to Audubon. After more than 30 years in journalism, he moved into the nonprofit environmental world, and has been there for fifteen years. He says:

> I went to the Environmental Defense Fund before I came to Audubon. When I was editor of the San Jose Mercury News, I had met a headhunter who encouraged me to think about running a nonprofit. She came back to me after I had five and a half years at Environmental Defense Fund and she said, 'Have I got a job for you! It's a great brand, and it's completely broken. You've got about a 50% chance of succeeding.' I think the

> skillset that I acquired as a journalist, everything from communications to strategy to HR and being able to balance a budget and work on deadlines, I think, all of that prepared me for a CEO in the nonprofit sector.

Yarnold is a legend in the world of nonprofit rebranding and renewal. I first read of his work when one of the nonprofit state leaders I work with sent me the Harvard Business School's case study about Yarnold's work at Audubon. The case study, written by V. Kasturi Rangan (2017), is appropriately titled *Audubon in 2017: The Turnaround.* In the article, Rangan reports that Yarnold had come to Audubon and balanced the budget, increased revenues more than $100 million, built an operating surplus of about $5 million and increased membership to more than one million. He did this through a rebranding effort that returned the focus of the organization back to birds and their flyways, in addition to replacing 10 of 12 key national leaders in the first 18 months.

When I speak with Yarnold he describes the challenges he saw when he arrived at Audubon:

> I cannot understate how broken Audubon was. It had no central vision and so there was almost nothing that was shared by 23 state offices and 41 nature centers and 463 chapters. There was no glue. My job was to find the glue, the overarching story, that could animate this distributed network and help it live up to its potential. As the Harvard Business School case outlines, the idea of finding the flyways was not just a vision that inspired people who know birds, but it served a really important organizational function, which is that it helped me both glue together all those parts, and it helped me break down the silos that had grown up around Audubon.

It is important to know the structure of Audubon to fully understand how difficult the organizational change was for Audubon. The state offices and the centers report up to Yarnold and are employees of the Audubon national headquarters. The chapters are independent 501(c)(3) nonprofit organizations. Yarnold tells me, "The state offices, while they are our employees, did not seem to know that when I took over in 2010. They all acted like that. We had 23 volunteer state boards that all thought they ran Audubon." Like so many legacy nonprofit organizations, the biggest challenge for rebranding is changing the internal organizational culture.

Yarnold's mission to rebrand and renew Audubon required him to be a flexible leader, attacking the challenges and problems in a multipronged manner. He tells me:

> It's been constant change. It was change from day one and I knew it. All of my life, going back to high school, I attacked the status quo and I'm compulsively creative, which makes me really ill-suited for some organizations and well-suited for others.
>
> Months before I interviewed Yarnold I was curious to understand more about his leadership attributes and why he has been so successful. He describes his leadership traits as: Being able to inspire people with a clear vision, so communication skills are top of the list. You can call it storytelling. It's about creating a vision that people can sign on to. And determination, perseverance. When I was an editor, I remember seeing a panel of three publishers, all of them are Pulitzer Prize winners. These were all guys that I just had huge respect for. And all of them were asked, 'What would you have done differently in your first year as a publisher?' It was a rare thing for journalists to become publishers. Usually, it's the ad guys, the ad people, who become publishers. All three of these editors, who I just really look up to, said, 'I would have been more decisive in my

> first year.' I resolved right then that if I ever had that opportunity, that there were a lot of mistakes I can make in my first year, but not being decisive enough was not going to be one of them. So, perseverance and decisiveness.
>
> When asked about his leadership traits, Yarnold's staff member tells me:
>
> His ambition has made him successful. He's extremely ambitious. And his intellect. He's a very smart person. Very, very, very smart. I also think his training as a journalist, you know, his communication skills, and particularly his journalism background." She then goes on to emphasize, "His intellectual curiosity is enormous. And his training as a journalist has provided him with a vehicle to act on that enormous intellectual curiosity. Those are the top things that I think of when I think of him.

By most accounts, Yarnold is an incredible communicator and noticeably clear in where he wants to go. He tells me:

> I also really believe in leading from the front. I think that people expect leaders to have visions—not hallucinations, but visions—and that they expect people to be able to articulate them … We started from this hypothesis around the flyways, rather than starting with a whiteboard. I think that there's a time for a bottoms-up approach and to build consensus, and there's a time to lead from the front, and most of the time is the time to lead from the front.

As an intellectual, Yarnold likes others to challenge him, and he also likes to do the challenging. When I ask him about his day-to-day leadership style, he says:

> You'd see somebody who asks lots of really hard questions, doesn't dance around the periphery. For example, we have a standing policy that I don't get presented to with a PowerPoint. That PowerPoint gets sent to me 36 hours in advance, and the assumption is

> that I will have looked at them and then we'll go into a meeting and we'll look at the relevant—the most important of those slides, and then get right down to the questions and decisions that need to be made. You'll see kind of a 'no nonsense' approach. It's very much about getting to the point.
>
> Yarnold goes on to say:
>
> You'd see somebody who really doesn't care who has the best idea. This is my journalism background. At the end of the day, I only care about what gets done, I don't care who owns the idea. I don't believe that I will have the best ideas, but I can guarantee you that I'll have an idea if nobody else does. I have a mentor who has said to me, 'Eighty percent of a CEO's job is just making decisions, and 80% of the decisions that you make really don't matter all that much.' There's a lot of truth in that…. Organizations can almost always change more dramatically and faster than they think they can. Audubon's proof of that. That's what the Audubon case ends up being about. I didn't know that when I started, but that's what it ends up being about. The corollary to that is that the cost of inaction is usually much greater than the cost of risk.

From my own experience, I completely agree with Yarnold on this point. As I listen to him speak, it reminds me that "change" does not ever end. I mention to him that there are many people that want the "change" to end so they can go back to their old way of working. His response is both hopeful and disparaging at the same time. He says:

> It's never done. In fact, in some ways, it just gets harder. But the difference is it gets harder with better people around you…. If you're doing things right, you're going to be constantly improving and you're going to have better people and you're going to have more complex, better problems to solve. The problems that we had to solve when I

> started were like how do we just get an answer to what the finances look like? Now we're looking at three-year rolling averages and fine-tuning those on an initiative-by-initiative basis. In the finance sphere, it's a totally different set of questions. The idea that change is done is wrong, 100% wrong.

As Yarnold and I are talking, I think about the enormous cultural and organizational change that has happened during his time at Audubon. In my mind, I think how difficult it must have been to lead organizational change in a culture with such large variety of stakeholders. The stakeholders of Audubon range from volunteer state board members and staff to donors and members. Yarnold tells me the staff was eager to come back to a bird-focused mission. He goes on to say:

They knew that Audubon was wandering in the wilderness and they welcomed that. State volunteer leaders had mixed feelings at best and, in some cases, really liked the fact that it felt like they ran Audubon. They weren't longing for somebody to walk into the executive office and say, 'Hey, we've got a vision that's going to glue the whole thing together and point us all in the same direction and maximize our impact.' They weren't sitting around waiting for that. As a result, when that started to happen, a number of them said, 'Hey, that's a really exciting vision. We'd love to be a part of that,' and some of them said, 'We kind of like it the way it is.' But that's how change goes—early adopters and not-so-early adopters.

Yarnold's colleague adds to this point when I speak to her:

> They came to the organization and became strong state leaders with strong state boards. And while at the end of the day, we want strong state leaders and state programs, it's essential for birds that we're a national organization, and we're protecting birds hemispherically. So, there was a very difficult period of time when leadership didn't

> benefit from a strong national view. Most of the leaders in place when we got here had never worked in decentralized organization.

Yarnold tells me there were a lot of people and donors who had written Audubon off as a major force for change. He describes some early conversations with potential donors saying:

> I had the exact same conversation with a program officer at the Packard Foundation and at the Hewlett Foundation one month apart. I actually have never asked them whether they got together on this, but I couldn't have been in my role more than six months, and each of them said to me—and they both knew Audubon and they had granted money to Audubon over time and they knew about our grassroots network—and they said, 'Look, if you can mobilize Audubon, you will have awakened the sleeping giant of conservation.' There were plenty of stakeholders who were hungry for Audubon to bring a bipartisan grassroots base to bear on some of the toughest environmental problems in America.

And in many ways, this is what Yarnold has done. The proof is not only in the data and results they are seeing in their impact, but also that many of those previously paused donors are now funding Audubon to the tune of millions of dollars, because they see their ability to produce results.

As a journalist, the focus on communications was an obvious one for Yarnold. I point out to Yarnold that our time is coming to a close and wonder if there is anything else he wants me to know. He is sure to add:

> One other thing is that for most organizations, communications is an underfunded afterthought. Because most people who run nonprofits come from the program side . . . Audubon is an example of the opposite of that, where we led with communications and

> we established ourselves through communications initiatives and state of the art—if you look at our website, you can see the difference. We did a publication a few months ago, where we did a midway report on our strategic plan. It's called Midflight and the cover illustration is a bunch of birds on an airplane. It's funny and people loved it. You get attention all the time. You can get attention all the time and mind share all the time, if you communicate well. Most NGOs don't understand that their communications competition is world class. We're competing for mind share against every cool website there is. Most organizations produce boring, institutional, jargon-laden stuff that makes them all feel great but isn't really designed to maximize impact. Not surprisingly, I bring that perspective because of my background.

Of course, he is right about the need for increased emphasis on communications, but for nonprofit organizations, challenges abound in terms of shifting funding at the expense of programs. I point out to Yarnold that most nonprofits believe they are measured by what they are doing in their program area and their impact in the field. I think his response is perfect:

> At the end of the day, people fund results. I don't disagree with that at all, but what most nonprofits don't do is they don't recognize that telling the story of those results is key to being measured properly. And so it's a little bit of a false distinction to think that there's the work in the field and then there's communications. If you're not communicating about the work in the field, the work in the field is of less value.

Yarnold's colleague speaks plainly when she summarily describes his leadership:

> I think the first thing is, like all successful CEOs, he is a completely unreasonable person. And, he sets a personal pace for himself, and for everybody around him, that's completely unreasonable. And I particularly think it is super important at nonprofits to just shake

> people out of their sleepiness. And I think, as an environmentalist, when we see that the window is closing for the opportunity to solve climate, being relentlessly ambitious is really important. And he is that. The second thing that I think he's particularly talented at is differentiating between what's important and what's essential. So, he plays sort of this very highly skilled game of chess and has the ability to easily move between strategy, tactics, and execution.

She then emphasizes her belief that few people can do that well. Her thought is that other leaders tend to build their skills around a single area rather than distancing themselves and keeping their point of view at the 50,000-foot level as Yarnold does.

She continues:

> So he's particularly gifted at working on multiple levels. And I think the other thing that I always admire about him, is [his belief] that everything is important … I think he really does believe that … And I think coming to an organization like Audubon that had been under financial stress for 10 years, and poorly managed. I think that was actually incredibly insightful of him.

During our conversation, Yarnold sums it up succinctly, saying, "I'm going to come back to that point about leading from the front. Start with a hypothesis. Be leaderly. Start with your point of view about what needs to be done and then be really flexible. Take responsibility for your vision, drive change, insist on urgency, set tight deadlines, and make decisions. Then move on."

Repetitive Refrains

Communication. Six of the seven CEOs interviewed repeatedly mentioned the importance of communication going through a rebranding process, or any organizational change.

While Hewko of Rotary was the only CEO not to repeatedly mention communication, he did mention its importance once during our interview. Most of the CEOs I interviewed have extremely complex structures including some type of federated organizations, boards, staff, and volunteers. The complexity of these organizations requires overcommunication to ensure all stakeholders received the information and understood what it means to their work in the field. Additionally, many of the CEOs also focused on being open to communication going in both directions. In one instance, McGovern of the Red Cross sent out an email requesting feedback. To her astonishment, she received about 10,000 messages with opinions and thoughts on her direction and strategy. Sherman of the Ad Council referred to conducting "listening tours" before making decisions on any changes. The Presidential speechwriter James Humes once said, "The art of communication is the language of leadership" (Paymar, 2012, para. 7). The interviews conducted in this research study reflect that most nonprofit CEOs rebranding their organization believe communication to be a major factor in leading change.

Organizational culture. Organizational culture was a recurring theme in four of seven CEO interviews. Sirangelo of the National 4-H Council also mentioned its importance while focusing on communication. Other CEOs tied culture to the brand and history of the organization. Clark of the Boys and Girls Clubs of America spoke of the importance of organizational culture tied to the development of the organization's new value statements and behaviors. Stewart of March of Dimes reflected on the organizational culture being tied to the mission and changing because of a new executive team. Jaskyte's research suggests:

> That it is critical that nonprofit managers understand the cultures of their organization and seek to develop values and practices that are supportive of innovation. There are a number of ways in which organizational culture can be influenced: through the beliefs

> and experiences of its members, through beliefs and values of leaders, and through organizational practices. (Jaskyte, 2004, p. 164)

The interviews conducted in this research reflect the importance of culture to most iconic nonprofit CEOs, and the tie to values, leadership, and people.

Management and decision-making. Three of the seven CEOs interviewed focused on the theme of management and decision-making, while Clark of Boys and Girls Club of America implied its importance through the strict adherence to the strategic plan. Yarnold of Audubon focused heavily during the interview on the importance of leading from the front and making prompt decisions despite taking on some risk. Stewart of March of Dimes focused on the accountability of management and using data to make good decisions for the organization. Both Yarnold of Audubon and Hewko of Rotary emphasized the importance of using private-sector principals and being more businesslike in rebranding a nonprofit. In their research on nonprofit leadership, Stid and Bradach (2009) found that nonprofit leaders believe visionary leadership drives fundraising and volunteer recruitment. However, the same nonprofit leaders are unable to deliver strong long-term results because of a lack of management and decision-making (Stid & Bradach, 2009). This research also suggests that nonprofit CEOs should find a balance between being both strongly led and managed. Interestingly, in the sample of seven CEOs in this research, only one, Sirangelo of National 4-H Council, has not spent considerable time as a leader in the private sector.

People. Three of the seven CEOs interviewed repeatedly focused on the theme of people during their interview, while others mentioned it under the themes of culture and communication. Those who focused on the theme of people spoke significantly about the leadership teams who report to them, as well as their boards of directors and affiliate

organization leaders. McGovern of the Red Cross, Sherman of the Ad Council, and Sirangelo of the National 4-H Council all emphasized the importance of a talented, experienced leadership team to implement rebranding strategies across the various parts of the organization. Stewart of March of Dimes also emphasized her leadership team when she spoke of organizational culture. In his monograph *Why Business Thinking is Not the Answer: Good to Great and the Social Sectors,* Jim Collins (2005) writes that "a finding from our research is instructive: the key variable is not how (or how much) you pay, but *who* you have on the bus" (p. 15). Many of the nonprofit leaders interviewed for this research understood this importance of the people around them and getting the right people on the bus.

Vision and mission. Three CEOs repeatedly spoke of the importance of the vision and mission of the organization, with several specifically referring to the significance of getting to the "why" of the mission. As if he had just seen the Ted Talk by Simon Sinek (2009), Clark of Boys and Girls Clubs of America talked about getting to the "why" within the organization's vision and strategy. Sirangelo of the National 4-H Council spoke extensively of finding a specific focus and goal for your vision. In the case of 4-H, their vision is increasing the number of youths they affect through their programs. This is singular focus of the National 4-H Council, or their "why," and everything they do leads to achieving that singular goal. Yarnold at Audubon spoke of changing the vision for the organization back to birds when he arrived as CEO. The organization had become too distracted by other issues and was in disarray because of a lack of focus. Yarnold shifted the vision back to birds and the programming of the organization centered around the flyways of birds rather than the geographic lines set up by their own regional offices. This strategic change broke down silos and created incentives for

everyone to collaboratively to protect birds in the world they live in, rather than the world humans have created for them.

History and legacy. All seven of the CEOs interviewed for this research spoke of the importance of the history and legacy of their organizations. However, only two CEOs focused on it as a repetitive refrain during our interview. Hewko of Rotary spoke extensively of the history of the organization to describe the challenges in structure and culture that exist today. And McGovern of the Red Cross explained the legacy of the mission of the organization not changing throughout the organization's history of more than 100 years. Interesting to me, the American Red Cross, started in 1881, and Rotary International, started in 1905, are two of the oldest nonprofits in the United States that still have their original mission and focus. It seems logical that McGovern and Hewko would focus on the importance of the history as they work to renew relevance and rebrand the organization.

Summary

In Chapter Four, I provided a description of the process used to generate the data and the methods used for tracking the findings collected in the interviews; written portraits of seven CEOs of iconic, legacy nonprofits based on interviews with them, their staff, and other collected sources of information such as media, journals, videos, websites, and newspapers; and I briefly discussed the recurring themes and repetitive refrains and patterns found throughout the portraits. Finally, Chapter Five discusses the implications of the research findings in practice for nonprofit leaders, and recommendations for further research and action. Additionally, Chapter Five will include closing reflections on the process.

Chapter V: Interpretations and Conclusions

In Chapter V I will 1) supply a brief overview of how and why I completed the study; 2) interpret the findings and link to relevant theory, research, and literature discussed in Chapter II and methodology discussed in Chapter III; 3) highlight the potential of the work to inform and have the potential for changing and improving the practice of nonprofit rebranding, and; 4) offer recommendations for further study.

Why Study Iconic Nonprofit Leaders

Nonprofit, nongovernmental, and charity organizations make up the social sector in the United States. The sector contributes to the development of American society by focusing on social good rather than the desire to make profit. For decades, the sector has functioned as the social conscience of our society. The social conscience is the collective consciousness of a society reflected in a collective identity, self-awareness, and unified goals. However, many iconic, legacy nonprofits have struggled to keep their relevance in today's world. In many cases, the organization's creation links to a past societal problem, and their mission and brand are no longer germane to today's generations.

There is an increasing importance in the role nonprofit organizations play in our global society today. When we worry about the deterioration of our environment, homelessness, and hunger, we often cite the need for social programs nonprofits deliver. Yet, most nonprofit organizations struggle to make ends meet and achieve their goals.

Nonprofits founded prior to 1960 in the United States, still striving to meet an unmet need in an increasingly needy country, have not only survived but also thrived because of their ability to be flexible and adapt to the decades through which they have traveled. They have survived because of their ability to change, innovate, and reform. In this decade and future

decades nonprofits continue to ignite the social change needed at any given moment in time. When a nonprofit organization stops adapting, it fails and is no longer relevant to the generation at hand.

As the top-level leader of a nonprofit organization, the CEO or ED defines the direction and the path for the organization's stakeholders. She or he determines the interpretation of the mission and is a part of the organizational brand. Considering the incredible responsibility of the CEO, it is imperative that nonprofit leaders understand how to create relevance, innovate, and rebrand to build a thriving social sector in a world that depends on its success. To be relevant, a nonprofit organization must be able to supply up-to-date, significant, and demonstrable services, resources, and information that satisfy the needs of the organization's stakeholders. In some cases, particularly with older nonprofits, rebranding is part of the effort to increase relevance.

Through this dissertation research, I have shaped a new view of nonprofit leadership, iconic organizations, and their successes in branding for renewed relevance. Usually, nonprofits measure their success by a number or count such as the amount of food distributed, or number of felons enrolled in Bible study. By contrast, my research supplies first-hand accounts of how CEOs of iconic nonprofit organizations view rebranding and implement change, what it means to the CEO, and what role history, culture, and ritual play in strategy and decision-making.

I believe that my research bridges the gap between the academic and the practitioner with both rigor and relevance, while generating usable knowledge. By offering research that creates an understanding of how leaders of legacy nonprofit organizations have leveraged change and rebranding for renewed relevance, we have the opportunity to activate existing and new

resources across the social sector with an aspiration of truly addressing global problems at increased scale.

With the results of this research, I expect to provide nonprofit leaders with some inspiration, best practices, and ingredients in leading their own nonprofits to not only surviving, but also to growing and thriving. The United States, and the world, needs a strong social sector now more than ever before. Increasingly, the government no longer can or will supply the needed services. Today and in the future, the social sector and their dedicated leaders must respond to the needs of a growing group of stakeholders and constituents.

The Process

To complete the research, I used the qualitative method of portraiture to express the difficulty, complexity, and intricacies of rebranding and transforming an iconic, legacy nonprofit. I shaped and defined the portraits of seven CEOs through dialogue and interaction with each of them, their direct reports, and a variety of articles, websites, and media sources.

My research began by sending hard copy letters to 23 leaders who fit into the criteria of a United States-based nonprofit organization started prior to 1960. I then followed this with an email of the same letter, along with consent form information. Of these, nine responded and agreed to an introductory phone call. After the calls, and over time, I scheduled eight interviews. Out of the eight CEOs who cancelled the interviews, seven rescheduled. Despite being very intentional about getting a racially diverse sample, I was only able to secure one racially diverse participant. My original list of 23 included eight racially diverse leaders, many of whom I reached out to several times. In a final effort, one of my dissertation committee members offered two more suggestions of racially diverse nonprofit CEOs who fit my criteria. Using my network, I tried to connect with both, and neither responded.

Travelling to New York City, Chicago, Washington, D.C., and Atlanta, I video- and audio-recorded the CEO interviews in their office or on Zoom, or, in one case, just audio-recorded on the phone. Upon completion of the CEO interviews, I audio-recorded interviews of at least one of their direct reports in person, on Zoom, or by phone. A professional transcribed the CEO interviews and I sent the draft transcriptions to each CEO for their review and edits to ensure it reflected what they intended to say. Ottr.com transcribed the staff interviews and I carefully reviewed the recordings to ensure accuracy. I read and reread all interviews to find recurring and emergent themes. While each portrait is unique and stands alone, the recurring, emergent themes reveal best practices and leadership traits across the spectrum of participants.

By reviewing the written transcripts, listening to the audio recordings, and watching the video recordings, the participant interviews revealed resonant metaphors, institutional and cultural rituals, and sometimes dissonance, in addition to the themes. The voices of these seven nonprofit CEOs revealed the major repetitive themes to be communication, organizational culture, management and decision-making, people, and vision and mission, with history and legacy being an important theme but only recurring in two interviews. By coding each interview, I was able find the best practices and dimensions each of these leaders uniquely applied and bring the data together to find the universal dimensions of rebranding an iconic nonprofit.

Effective leaders embody knowledge, intelligence, skills, and experience. As these seven portraits reflect, equally important is self-knowledge, humility, and the willingness to sacrifice for the mission of the organization. Nonprofit CEOs must constantly question assumptions, challenge the status quo, and take risks to renew the relevance and rebrand in a way that reflects innovation and renewal.

Interpretation of the Findings

The CEO portraits reflected many repetitive refrains that may seem obvious to academics or practitioners who have a high level of knowledge about leadership and change. However, I believe there are many other nonprofit leaders who may be able to gain from the best practices that seem obvious to experts. On the other hand, in some of the portraits, there is dissonance and divergence from the overall group of CEOs. Nonprofit leaders can gain valuable learning in understanding these different tools and practices.

High-quality and regular communication is one of the practices used more often by nonprofit leaders during a rebranding process. Six of the seven CEOs interviewed repeatedly mentioned the importance of communication going through a rebranding process, or any organizational change. Most of the CEOs I interviewed have extremely complex structures including some type of federated organizations, boards, staff, and volunteers. The complexity of these organizations requires overcommunication to ensure all stakeholders receive the information and understand what it means to their work in the field. Additionally, many of the CEOs also focused on being open to communication going in both directions. The interviews conducted in this research study reflect that most nonprofit CEOs rebranding their organizations believe communication to be a major factor in leading change. While it may seem obvious, regular, high-quality communication from the CEO to an organization's stakeholders is key to any nonprofit rebranding success. More important may be how a CEO tailors those communications to varying stakeholder groups.

Organizational culture was also a recurring theme in four of seven CEO interviews. CEOs mentioned its importance while focusing on organizational communication, brand, history, mission, values, and behaviors. Not surprisingly to me, because of my own experience as a

nonprofit leader, CEOs linked leadership changes on the executive team to changes in organizational culture, too. I have seen organizational cultures shift and adapt with new executive-level leaders who bring cultural traits with them from former organizations. The interviews conducted in this research reflect the importance of culture to most iconic nonprofit CEOs, and the tie to values, leadership, and people. The nonprofit CEO needs to set up a strongly held organizational culture to implement rebranding and renewing relevance. At times, that means removing the old culture and replacing it with new values, mission, logo, and most importantly, people and leadership who can integrate into the new organizational culture. A CEO should know when to reaffirm existing culture or when to replace it based on the reactions of donors, members, and followers, as well as how the organization is impacting the communities and people being served by its mission.

Three of the seven CEOs interviewed focused on the theme of management and decision-making and implied its importance through strict adherence to their strategic plan. The leaders interviewed focused on the importance of leading from the front and making prompt decisions despite taking on some risk. They emphasized the accountability of management and using data to make good decisions for the organization. Some of the CEOs highlighted the importance of using private-sector principals and being more business-like in rebranding a nonprofit. This research also suggests that nonprofit CEOs should find a balance between being both strong leaders and efficient managers. Nonprofit CEOs should be leaders who can make tough and prompt decisions based on data and established strategy.

Three of the seven CEOs interviewed repeatedly focused on the theme of people during their interview, while others mentioned it under the themes of culture and communication. Those who focused on the theme of people spoke significantly about the leadership teams who

report to them, as well as their boards of directors and affiliate organization leaders. A talented, experienced leadership team to implement rebranding strategies across the various parts of the organization is essential to the success of rebranding a nonprofit. Those leaders must also believe and live the organizational culture. Many of the nonprofit leaders interviewed for this research understood this importance of the people around them and getting the right people on the bus.

In the interviews, three CEOs repeatedly spoke of the importance of the vision and mission of the organization, with several specifically referring to the significance of getting to the organization's "why." A singular focus for the organization that all stakeholders can get behind and believe in is key to any nonprofit rebranding efforts. Nonprofit CEOs must be clear about this single vision and not confuse it with the tactics employed to reach it. Nonprofit organizations tend to "follow the money" to survive at the peril of their singular vision. Often this approach is due to pressure from the boards of directors and can lead to organizational disarray reflected through the brand. The importance of a singular vision allows for a clear understanding of any nonprofit brand.

Together, the seven nonprofit organizations studied for this research have more than 750 years of continually working in the name of their mission. All seven of the CEOs interviewed for this research spoke of the importance of the history and legacy of their organizations. Throughout these 750 years, these organizations have adapted, rebranded, and changed to the respond to the needs of present day. However, they have not forgotten about or dismissed those who came before them. The importance of rebranding is important for many reasons. Nonprofit leaders do not want stakeholders and the public to define the organization only by its past. A nonprofit leader must find the balance between respecting the history of the nonprofit while, at

the same time, renewing the relevance and brand to assure the survival of the organization for many years to come.

Dissonance and Divergence in the Findings

The research findings reflected divergence and dissonance unique only to individual CEOs. Stacey Stewart, a black female, emphasized the need for her organization to serve racial and ethnic minority mothers and pregnant women at the March of Dimes. She underscored data on the racial inequities on problems in pregnancy and birthrates. While the CEOs I interviewed have similar data to apply to their mission, Stewart was the only one to highlight it during our interview. On the other hand, Lisa Sherman is a lesbian female. In our interview, she never mentioned this about her identity, or tied this to her work at Ad Council in any way. However, she has mentioned being part of a same-sex couple in other interviews I read, and the tie to who she is as a leader and changemaker is an important aspect of her success (Moore, 2019).

Six of the seven CEOs interviewed for this research had considerable experience in the private sector prior to becoming nonprofit leaders. Only one, Jennifer Sirangelo of the 4-H Council, has risen-up through the ranks of nonprofit organizations. Interestingly, Sirangelo is overseeing a profitable hotel business as part of her CEO role at 4-H. The 4-H Council owns and runs the National 4-H Conference Center in the Washington, D.C. metro area with beds for more than 800 guests. I imagine running a hotel and conference center to be an enormous undertaking. However, during our interview, Sirangelo focused on the singular vision of changing more children's lives. She mentioned the hotel as an aside and sees it as a tactic to reach the vision she is working to achieve.

Both Lisa Sherman and John Hewko, of the Ad Council and Rotary respectively, spoke about the influence their fathers had on their careers and decision to move into the nonprofit

sector. They both tell a story in which their fathers play an important and influential role. Gail McGovern of Red Cross mentioned the importance of her husband's support in her success. Others did not make a connection between their families and their work, choosing to keep their personal lives out of the professional nature of the interview.

The female CEOs whom I videotaped were conscious of their appearance and their preparation, while the males spoke more spontaneously and did not seem to have dressed or primped for the taping. In the case of Stewart, she had her makeup artist apply her makeup and groom her hair before we videotaped the interview. Her communications staff had prepared notes for her to review about me and my research. Sirangelo wore a shirt with a large 4-H logo on the front. Her communications staff met me early to set up for the taping with the 4-H flag behind her and ensured her hair was neatly set. Her team had also briefed her about me and my research prior to our meeting. Sherman asked if she and her surroundings looked good before we started taping. Additionally, all three female CEOs had at least one member of their staff in the room while we conducted the videotaped interviews. None of the male CEOs had anyone else join us and none of them expressed any concern with their appearance or the background where we videotaped the interviews.

Most of the CEOs spoke about the complexity of their organizational structure, and the barriers and challenges these structures present to change. The enormous challenge of bringing along hundreds of affiliate organizations and millions of volunteers and participants in a change process of any kind is unlike any leadership challenge imaginable. Nonprofit CEOs who oversee federated structures, whether they are separate organizations or a part of the headquarters organization, must find methods of being inclusive and respectful of these local and regional leaders, and their stakeholders. They must respect that stakeholder loyalty to their local and

regional affiliate organizations is deeper and closer to home. And, to show real, scalable impact, a top-level nonprofit CEO needs to convince all levels of the organization that their way is the right way.

Finally, none of the CEOs interviewed mentioned the divisive nature of politics today and the impact politics has on the nonprofit sector. All the CEOs respect that the mission of their organization is to serve where needed. In a search on political donations, I found that John Hewko has given money to Republicans, and Stacey Stewart, Lisa Sherman, and Gail McGovern have given money to Democrats. Jim Clark, Jennifer Sirangelo, and David Yarnold do not appear to have donated to any political candidates or parties (Federal Election Commission, n.d.). The importance of this varying data point lies simply in the fact that political leanings make no difference in how a CEO leads rebranding and change in a nonprofit. The importance lies in being a leader who understands political persuasion cannot be a factor in supporting the social needs of our country.

Nonprofit leaders can gain valuable insight through the understanding of the rebranding best practices practiced by the CEOs of iconic nonprofit organizations. There is also much to gain by recognizing the unique and different data points found through the portraits of the seven participants. Sometimes, it is the outliers who hold the secrets to success by going creatively against the grain.

Critical Analysis and Synthesis

Returning full circle to the beginning of this process, I will compare and link the findings in my research with the relevant theory, research, practice, and literature review in Chapter II and to the methodology in Chapter III. The question is whether the findings and portraits presented in my research link to past literature. I chose to study this subject because I could not find any

earlier research on the CEOs of iconic, legacy U.S.-based nonprofits using the portraiture methodology. However, there are links in the literature to the results shown in my research.

In the abstract of this document, I presented the intent of this study to examine top-level—CEO and ED—leaders of iconic, legacy nonprofit organizations who have worked to implement reform and change through rebranding for renewed relevance. The research plan was to look at these principal areas: (1) What drove the leader to innovate and rebrand their organization and what does it mean to them personally and professionally? (2) What leadership practices has the CEO incorporated to allow the changes and reforms to be successful and why does the CEO believe they worked?

My first step was to review the literature to find relevant material about top-level nonprofit leadership. The findings were minimal. Most of the literature on leadership speaks to the issues of for-profit leadership and management, leaving nonprofits to adapt the findings to their situation.

Expanding my research, I reviewed the existing literature on iconic nonprofits, nonprofit leaders, nonprofit change overall, and nonprofit rebranding specifically. Through this process I affirmed how case study research (up-close, in-depth study of a person, place, or organization) on top-level leaders of iconic, legacy nonprofits rebranding for renewed relevance sits within the larger domain of prior research. One, there is little to no case study research on nonprofit leaders of any type and I could find none specifically on top-level leaders of legacy nonprofits. And, two, while the literature does support the need for rebranding in the case of older nonprofits, it does not refer to the CEOs and EDs who lead the initiative to rebrand and how they move through the changes.

The literature review affirmed my quest for a series of portraits which told the story of CEOs in iconic nonprofits rebranding to achieve renewed relevance. Understanding the process these iconic nonprofit leaders go through to create change and to rebrand is extremely valuable to other leaders in similar roles. We can learn many valuable insights from case study research in this subject area. And we can gain from the valuable stories documented through portraiture methodology outlined in Chapter III.

As shown in Table 4.2, my research found six recurring themes considered best practices used by CEOs of the iconic nonprofits interviewed about rebranding for renewed relevance. The first, communication, links to earlier literature. Specifically, Kearns et al. (2015) "suggest that a rich and diverse set of interpersonal and conceptual skills may underlie many of the formal leadership roles and functions of nonprofit CEOs, especially skills involving communication, mediation, and trust building" (p. 724). McLeod Grant (2013b) confirms, "Leadership at all levels of the system is important, as is constant communication and engagement" (para 7). Several other studies reiterate building a strong brand through communication reflected in the organization's name, logo, slogans, taglines, social media, and other visual representations (Aaker, 1997; Naddaff, 2004; Smith et al., 2006).

Organizational culture was the second recurring theme found in my research. In her 2004 study, Jaskyte conducted an exploratory study of transformational leadership, organizational culture, and organizational innovativeness. Her findings suggest that examining the link between leadership and organizational culture is important for understanding how leadership and innovation are related, and supplies empirical support for the links between leadership, organizational culture, and innovativeness. Additionally, Keller et al. (2010) write, "Future

studies should include the effects of deeply imbedded organizational cultures and management structure on brand development and the acceptance of brand management" (p. 118).

The third repetitive refrain was about the CEOs' management and decision-making skills. This theme often repeats in the literature. In a typical nonprofit, the CEO role is one of singular importance (Heimovics & Herman, 1989; Menefee, 1997; Phipps & Burbach, 2010; Drucker, 1990). Particularly in small- to medium-sized nonprofits, the CEO is involved in practically every decision made in the organization including, but not limited to, strategic planning, personnel, programming, training, and fundraising (Riggio & Orr, 2004; Dargie, 1998). In other words, nonprofit CEOs and EDs hold within their hands an enormous responsibility and extraordinary authority for insuring success of the organization (Herman & Heimovics, 1990). Maxwell (2007) confirms change and implementing progressive decisions is one of the most vital responsibilities of a nonprofit CEO.

The CEOs interviewed also repeated the theme of people. Specifically, they spoke of having the right people in the right leadership roles. While it is an often-repeated management rule that any CEO needs to get the "right people on the bus in the right seats" (Collins, 2005), this did not often surface in my review of the literature. The only link to my literature review was the Kylander and Stone (2012) research in which they write, "Increasingly, branding is a matter for the entire nonprofit executive team" (p. 38). However, in my review of the literature, there were not strong findings on research about the importance of people who make up a nonprofit leadership team. The study of the significance of a nonprofit executive leadership team could be in area for future research to fill this gap.

The fifth recurring theme in my study was vision and mission. Higgs and Rowland (2000) define a change leadership as leadership with the ability to influence and excite others

through personal advocacy, vision and drive, and access to resources to build a solid platform for change. Jiang (2008) reiterates that because of the maturation of the sector, a nonprofit leader needs to be businessminded and technical, in addition to having the traditional qualities of vision, strategy, and dedication to the mission. In attempting to determine leadership behaviors, characteristics, or effects that are most conducive to success in a nonprofit environment, Tayloret al. (2014) found:

> That visionary leadership has a positive effect on perceived organizational effectiveness in the nonprofit setting…. Participation and openness, innovation and adaptation, commitment and moral, external support and growth, and direction and clarity are each positively correlated with a leader's visionary actions. (p. 576)

McLeod Grant (2013b) emphasizes that iconic, legacy nonprofits find a new vision and strategy for impact. Her research finds many nonprofits still have a north star within them, but the light has diminished over time, covered over by layers of lower-impact activities.

Finally, the last recurrent theme in my research is the importance of history and legacy in the rebranding of a nonprofit. McLeod Grant (2013d) writes that iconic organizations are "too valuable and hard-won not to be leveraged for greater social impact" (para 3). She goes on to underscore that legacy nonprofits need to both reconnect with historic purpose and reimagine the organization potential in the current era (McLeod Grant, 2013d). In the literature, Salipante and Golden-Biddle (1995) describe their belief that organizational decline rather than success is likely to be the result of a nonprofit moving away from its traditional core competencies and restructuring, due to reliable performance and established accountability procedures being eroded. They also emphasize that nonprofit leaders should consider tradition, history, and continuity in any change.

Implications for Practice

The significance of this study as outlined in Chapter I underscored the increasing importance in the role nonprofit organizations play in our global society today. When we worry about the deterioration of our environment, lack of intercultural understanding, homelessness, and hunger, we often cite the need for social programs nonprofits deliver. Yet, most nonprofit organizations struggle to make ends meet and achieve their goals.

The findings in this research have implications in practice for nonprofit leaders. The findings reveal a new view of nonprofit leadership, iconic organizations, and their successes in branding for renewed relevance. The portraits found in this research show firsthand, real accounts of leading nonprofit rebranding and change. The portraits tell the unique story of each individual CEO and their perspective and best practices for rebranding for renewed relevance in some of the United States' most iconic, oldest nonprofits. Their stories are real and reveal what works and what does not work in the slog of bringing a legacy nonprofit back to life and renewing its relevance for a sustainable future.

Unfortunately, the nonprofit sector and nonprofit leadership are not the subject of enough research (Bielefeld, 2006; Phipps & Burbach, 2010; Kearns et al., 2014). The lack of research on the social sector leaves nonprofit leaders with the option of translating general leadership research to fit the nonprofit sector, or to simply move forward in an experimental manner not necessarily knowing what would work in their particular setting. Thus, it seems clear there is a need in the field for more research around nonprofit leadership, repositioning and rebranding:

> The nonprofit sector needs to develop its own research agenda and distribute findings to nonprofit managers. This process is in its infancy. Whereas research on the nonprofit sector has been vigorous over the last few decades, most of it has focused on giving and

> volunteering or on discovering and delineating the basic dimensions of the sector and (more recently) its relations with the other sectors. It is vitally important that management practices in the nonprofit sector be based on sound, useful research on nonprofit organizations. (Bielefeld, 2006, p. 397–398)

Therefore, it was imperative my dissertation measure "actual events or outcomes versus the potentialities to produce these events or outcomes," and to highlight "concepts that are descriptive versus those that are more evaluative" (Bielefeld, 2006, p. 403). By studying the stories of CEOs, I offer nonprofit leaders several best practices successfully used by these seven CEOs.

When I think back to the practical implications surfaced from this research, there are solid recommendations that we can find for any nonprofit leader, and especially for those working to rebrand in iconic, legacy nonprofit organizations. The recommendations I would offer from this research, and those I will use in my own nonprofit rebranding practice, are important and used by the leaders who took part in this research. In simple terms, recommendations and take-aways for nonprofit CEOs are summarized in Table 5.1.

Table 5.1

Recommendations for Practice

Theme	**Recommendations**
Communication	• Maintain an environment of transparency and openness in decision-making and response. • Communicate to all stakeholders in the manner and style that works best for any one of your specific stakeholder communities. • Communicate as much and as often as possible.
Organizational Culture	• Take the time to adjust and change the organizational culture before implementing a major rebranding effort • Real, sustainable organizational culture change takes time. Give it the time it needs to have long-term success

People	• Get the best possible people on the leadership team • Only with people passionate about the organizational mission, increasing impact, and following the lead of the CEO, can an organization be successful both in the short and long-term • Show those unwilling to work hard and embrace change to the door
Management and decision-making	• Make decisions, even risky ones • Strongly and competently manage the organization • Be a leader and understand everyone will not like you all the time • Explain your decisions and communicate the reasons behind them
Vision and mission	• Do not lose sight of why your organization exists, what or who it exists to serve, and focus any rebrand around the importance of the organization's mission and impact on society • Find the organization's reason for being, and rally any rebrand behind that singular goal rather than the tactics used to achieve the goal
History and legacy	• Celebrate and respect the history and legacy of the iconic nonprofit, and those who led the iconic nonprofit to the successful place it has arrived so far • Build on their successes to innovate and rebrand for renewed relevance • Respect and acknowledge the past

As the leader of an iconic nonprofit, I have already put most of these best practices in place and recognize their value, having a clear understanding of their worth in rebranding and change at KAB. Applying the findings in this research to my own nonprofit CEO practice, I have become keenly aware of the importance of communication, both internal and external, as KAB looks to rebrand. The importance of the many years of history of KAB has never been far from my mind as the CEO of an organization with more than 600 affiliate organizations and millions of volunteers working every day to end litter, improve recycling, and beautify their communities. The research findings confirm the value of the executive team with whom I work every day. Their insight, advice, and support make the rebranding of Keep America Beautiful possible, as I could not do it on my own, nor could any other nonprofit CEO. The findings in

this research also encourage me to make swifter, clearer decisions despite taking on some risk, and confirm my practice of using data and adhering to the strategic plan as a best practice in other nonprofits. Finally, in my own practice, I understand and agree with the research findings that reflect the value and importance of organizational culture along with mission and values. For Keep America Beautiful these two findings complement each other in many ways. The organizational culture cannot change without new and embraced values. Using myself and Keep America Beautiful as a case-in-practice, I am confident nonprofit leaders can apply the findings of this research to their own practice of nonprofit leadership and rebranding.

The choice of portraiture for this study also offers a new way for nonprofit leaders to gain from the research findings. Reading the personal accounts of how these seven CEOs are rebranding their organizations allows other nonprofit leaders to understand on a personal level and see themselves reflected in the stories of the seven CEOs in this research. Nonprofit CEOs are more likely to use the findings in this research if they can personally relate to their stories. We can find the value and importance of a story in the practical application of the research findings. Nonprofit leaders, like me, will use the research findings to change and improve their own practice if they can relate to the story told in the portraits. These seven portraits are personal and offer an authoritative way of making meaning and connection. Through the stories told by the seven CEOs, others can learn from their experiences and can transform into stronger, more confident nonprofit leaders.

Lastly, the findings in this research will add to the body of knowledge about successful leaders of iconic nonprofit organizations and the best practices for achieving renewed relevance through nonprofit rebranding. It is my hope that these research findings promote a greater awareness of the success and challenges of nonprofit leaders and increase the interest of potential

organizational stakeholders in the future. Many nonprofit stakeholders, especially donors, do not have a true understanding of the complexity and challenge of leading a nonprofit. And they have little to no knowledge of what it takes to rebrand, innovate, and renew the relevance of an iconic, legacy organization. Nonprofit leaders could use the portraits and findings in this research to offer real-world examples to their stakeholders and donors when seeking their support on rebranding decisions and direction.

Recommendations for Further Study

This research study could expand in a variety of ways to increase the academic and practical knowledge of nonprofit leadership. First, the sample could be larger and more diverse. More iconic nonprofit CEOs from a larger sample of legacy organizations could be studied to further confirm the findings in this study. In this study, I interviewed only one or two of the CEOs' direct reports about their leadership and change processes. In future research, I would recommend interviewing more staff at varying levels within the organization. And, despite this study's sample of participants reflecting the demographic diversity of today's nonprofit leadership, I would recommend expanding the sample to include more racial and ethnic diversity.

My research studies iconic nonprofits primarily working and headquartered in the United States. This criterion allowed for the similarity of national culture to not be an added factor in the research results. Supplemental research could focus on international nonprofits running programs and supplying services in other countries. By researching CEOs rebranding in other countries, we could find cultural nuances in leadership not found in this study.

Portraiture is one method of presenting interview data, allowing the researcher to tell a story of the data-gathering process. For me, and for the way I wanted to present the research,

portraiture was the right methodology. In future research, I would recommend considering the possibility of a mixed methods approach. Through the addition of nonprofit staff surveys and focus groups, the research would reflect more robust and verified results.

Finally, this research led to the collection of 16 hours of audio- and video-recorded interviews with other data not used in this final dissertation. The portraits I wrote and developed for this final document highlight the interview points I believed most important and relevant for understanding the change leadership of these nonprofits. However, I could expand and lengthen the portraits by including the data not used for this final dissertation.

Closing Reflections on the Process

I imagine I have become a better, stronger, more confident nonprofit CEO because of this research. In my own role as President and CEO of the iconic nonprofit, Keep America Beautiful, I regularly refer to the stories and methods used by the CEOs who shared their rebranding experience through this research and reflected in the portraits in Chapter IV. The results of this research have supported my own nonprofit's rebranding process and encouraged me to lead Keep America Beautiful in ways supported through the findings of this study. Because of my professional application, I am convinced other nonprofit CEOs will also be able to apply these findings to their organizational situation. Through this research I learned there are a lot of amazing, wonderful leaders in the social sector working tirelessly to meet the needs of their stakeholders and create positive social change. Their knowledge and skills will help other nonprofit leaders through the results of this study.

Personally, I discovered a variety of things about myself through the process of researching and writing this dissertation. I learned that doing my own research is much more fun than reading someone else's results. But even my best efforts at the perfect research plan had to

be flexible and often adjusted. Patience has not always been one of my strong suits. Throughout this process, there were many things I simply could not control in scheduling and conducting interviews. Many other people's schedules had to come before mine.

I also realized that I can be the expert in this one small area, but I cannot be the expert in all areas. Finishing this research and my degree became the priority rather than expanding the study into more areas. The future will wait for expanding this research. Looking back over the time I took for my research, I know striving for a PhD while leading the rebrand of an iconic nonprofit may have been the most insane decision and the best decision I have ever made. Conducting this research required a lot of my time and energy and took me away from leading Keep America Beautiful. However, I am an improved change leader and CEO for Keep America Beautiful overall because of this study.

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Appendices

Appendix A-Letter to CEOs and EDs

To: *CEO/ED Interview Participant*

From: Helen Lowman

Subject: Request to Participate in Study

Date: _____

Dear: _____

My name is Helen Lowman, and I am a Ph.D. candidate at Antioch University's School of Leadership and Change. I am also the President & CEO of Keep America Beautiful, the 65-year old nonprofit organization building sustainable communities through ending litter, improving recycling, and beautifying communities.

For my degree, I am researching top-level, CEOs and Executive Directors, leaders of iconic, legacy nonprofit organizations who have worked to implement reform and change through rebranding for renewed relevance. I am particularly interested in these main areas: (1) What drove you to innovate and rebrand your organization and what does it mean to you personally and professionally? (2) What leadership and management steps, practices, and methods have you have incorporated to allow the changes and reforms to be successful and why do you believe they worked?

This research will add to the body of knowledge about successful leaders of iconic nonprofit organizations and the best practices for achieving renewed relevance through nonprofit rebranding. This research could potentially assist with a greater awareness of the success and challenges of nonprofit leaders and increase the interest of potential organizational stakeholders in the future.

Thank you for your willingness to consider participating in the interview. Your participation is completely voluntary. Should you agree to be a part of this study, our interview will be both audio and video recorded for the purposes of gathering qualitative data and to maintain the essence of your words for the research. Additionally, I will request the names and contact information of 2-3 of your direct reports whom you recommend I ask to interview about your style and methods for change leadership. The entire interview will take approximately one to one and a half hours at the time and location of your choosing. You may request to see or hear the information I collect at any time. Excerpts and video clips from the interview may be included in the final dissertation report, presentations, or other papers and publications.

I have attached a consent form that I will ask you to sign before the interview. Please review the document and let me know if you have any questions or concerns. I will reach out to you by phone within 3-5 business days to follow up. In the meantime, feel free to call ([redacted]) or write [redacted]) to me at your convenience.

Sincerely,

Helen A. Lowman

Appendix B-CEO and ED Consent Form

This informed consent form is for CEOs and Executive Directors of iconic, legacy nonprofit organizations based in the United States who we are inviting to participate in a research project titled "Nonprofit Leadership: How Top-level Leaders of Iconic Nonprofit Organizations Rebrand for Renewed Relevance."

Name of Principle Investigator: Helen Lowman

Name of Organization: Antioch University, PhD in Leadership and Change Program

Name of Project: Nonprofit Leadership: How Top-level Leaders of Iconic Nonprofit Organizations Rebrand for Renewed Relevance

You will be given a copy of the full Informed Consent Form

Introduction

I am Helen Lowman, a PhD candidate for Leadership and Change at Antioch University. As part of this degree, I am completing a project to better understand how CEOs and Executive Directors of iconic, legacy nonprofit organizations go about rebranding for renewed relevance. I am going to give you information about the study and invite you to be part of this research. You may talk to anyone you feel comfortable talking with about the research, and take time to reflect on whether you want to participate or not. You may ask questions at any time.

Purpose of the research

The purpose of this project is to better understand how CEOs and Executive Directors of iconic, legacy nonprofit organizations go about rebranding for renewed relevance. This information may help us to better understand successful leaders of iconic nonprofit organizations and the best practices for achieving renewed relevance through nonprofit rebranding. This research could

potentially assist with a greater awareness of the success and challenges of nonprofit leaders and increase the interest of potential organizational stakeholders in the future.

Type of Research Intervention

This research will involve your participation in an audio/video interview, looking particularly in these main areas: (1) What drove you to innovate and rebrand your organization and what does it mean to you personally and professionally? (2) What leadership and management steps, practices, and methods have you have incorporated to allow the changes and reforms to be successful and why do you believe they worked? The interview will be audio and video recorded for research purposes. The participants' contributions will be not be de-identified prior to publication or the sharing of the research results.

Participant Selection

You are being invited to take part in this research because you currently are, or have been in the past, the CEO or Executive Director of an iconic, legacy nonprofit organization. You should not consider participation in this research if you are not able to share your experience in rebranding your nonprofit organization openly and honestly, and with full understanding that your name and identity will be used throughout the research study.

Voluntary Participation

Your participation in this study is completely voluntary. You may choose not to participate. You will not be penalized for your decision not to participate or for anything of your contributions during the study. Your position will not be affected by this decision or your participation. You may withdraw from this study at any time. If an interview has already taken place, the information you provided will not be used in the research study.

Risks

No study is completely risk free. However, I do not anticipate that you will be harmed or distressed during this study. You may stop being in the study at any time if you become uncomfortable or if you experience any discomfort as a result of your participation.

Benefits

There will be no direct benefit to you, but your participation may help others in the future. Additionally, I will share the results of the entire research study with you in an executive summary.

Reimbursements

You will not be provided any monetary incentive to take part in this research project.

Confidentiality

Your name and the name of your organization will be used in the report and any subsequent publications or presentations. As a subject of the study your responses will not remain anonymous and will be used along with other nonprofit leaders. Other participants in the study asked to speak about your leadership will remain anonymous to the extent their names will not be used in the final project.

Limits of Privacy Confidentiality

Generally speaking, I can assure you that I will keep everything you tell me or do for the study only. Yet there are times where I am required to report information I have learned through my research. Any researcher must take steps outside of the study when:

- The researcher finds out that a child or vulnerable adult has been abused

- The researcher finds out that that a person plans to hurt him or herself, such as commit suicide
- The researcher finds out that a person plans to hurt someone else

There are laws that require many professionals to take action if they think a person is at risk for self- harm or are self-harming, harming another or if a child or adult is being abused. In addition, there are guidelines that researchers must follow to make sure all people are treated with respect and kept safe. In most states, there is a government agency that must be told if someone is being abused or plans to self-harm or harm another person. Please ask any questions you may have about this issue before agreeing to be in the study. It is important that you do not feel betrayed if it turns out that the researcher cannot keep some things private.

Future Publication

The primary researcher, Helen Lowman reserves the right to include any results of this study in future scholarly presentations and/or publications.

Right to Refuse or Withdraw

You do not have to take part in this research if you do not wish to do so, and you may withdraw from the study at any time without being affected.

Who to Contact

If you have any questions, you may ask them now or later. If you have questions later, you may contact Helen Lowman, [redacted].

If you have any ethical concerns about this study, contact Lisa Kreeger, Chair, Institutional Review Board, Antioch University Ph.D. in Leadership and Change, Email: [redacted].

This proposal has been reviewed and approved by the Antioch Institutional Review Board (IRB), which is a committee whose task it is to make sure that research participants are protected. If you wish to find out more about the IRB, contact Dr. Lisa Kreeger.

DO YOU WISH TO BE IN THIS STUDY?

I have read the foregoing information, or it has been read to me. I have had the opportunity to ask questions about it and any questions I have been asked have been answered to my satisfaction. I consent voluntarily to be a participant in this study.

Print Name of Participant_____

Signature of Participant _____

Date _____ Day/month/year

DO YOU WISH TO BE AUDIOTAPED and VIDEOTAPED IN THIS STUDY?

I voluntarily agree to let the researcher video and audiotape me for this study. I agree to allow the use of my recordings as described in this form.

Print Name of Participant_____

Signature of Participant _____

Date _____ Day/month/year

To be filled out by the researcher or the person taking consent:

I confirm that the participant was given an opportunity to ask questions about the study, and all the questions asked by the participant have been answered correctly and to the best of my ability. I confirm that the individual has not been coerced into giving consent, and the consent has been given freely and voluntarily.

A copy of this Informed Consent Form has been provided to the participant. Print Name of Researcher/person taking the consent_____

Signature of Researcher /person taking the consent_____

Date _____ Day/month/year

Appendix C-Letter to Employees

To: *Staff Interview Participant*

From: Helen Lowman

Subject: Request to Participate in Study

Date: _____

Dear: _____

My name is Helen Lowman, and I am a Ph.D. candidate at Antioch University's School of Leadership and Change. I am also the President & CEO of Keep America Beautiful, the 65-year old nonprofit organization building sustainable communities through ending litter, improving recycling, and beautifying communities. Your name and contact information were given to me by (*CEO or ED name)* as someone whom I could request to interview about their style and methods for change leadership.

For my degree, I am researching top-level, CEO and Executive Director, leaders of iconic, legacy nonprofit organizations who have worked to implement reform and change through rebranding for renewed relevance. I am particularly interested in these main areas: (1) What drove the leader to innovate and rebrand the organization and what does it mean to them personally and professionally? (2) What leadership and management steps, practices, and methods have you seen or experienced to allow the changes and reforms to be successful and why do you believe they worked?

This research will add to the body of knowledge about successful leaders of iconic nonprofit organizations and the best practices for achieving renewed relevance through nonprofit rebranding. This research could potentially assist with a greater awareness of the success and

challenges of nonprofit leaders and increase the interest of potential organizational stakeholders in the future.

Thank you for your willingness to consider participating in the interview. Please understand your participation is completely voluntary. Should you agree to be a part of this study, our interview will be both audio and video recorded for the purposes of gathering qualitative data and to maintain the essence of your words for the research. While I cannot guarantee your identity will not be discovered, your name will not be used in any part of the final dissertation report, presentations, or other papers and publications. The entire interview will take approximately one to one and a half hours at the time and location of your choosing. You may request to see or hear the information I collect at any time.

I have attached a consent form that I will ask you to sign before the interview. Please review the document and let me know if you have any questions or concerns. I will reach out to you by phone within 3-5 business days to follow up. In the meantime, feel free to call ([redacted]) or write ([redacted]) to me at your convenience.

Sincerely,

Helen A. Lowman

Appendix D-Employee Consent Form

This informed consent form is for employees and staff of iconic, legacy nonprofit organizations based in the United States who we are inviting to participate in a research project titled "Nonprofit Leadership: How Top-level Leaders of Iconic Nonprofit Organizations Rebrand for Renewed Relevance."

Name of Principle Investigator: Helen Lowman

Name of Organization: Antioch University, PhD in Leadership and Change Program

Name of Project: Nonprofit Leadership: How Top-level Leaders of Iconic Nonprofit Organizations Rebrand for Renewed Relevance

You will be given a copy of the full Informed Consent Form

Introduction

I am Helen Lowman, a PhD candidate for Leadership and Change at Antioch University. As part of this degree, I am completing a project to better understand how CEOs and Executive Directors of iconic, legacy nonprofit organizations go about rebranding for renewed relevance. I am going to give you information about the study and invite you to be part of this research. You may talk to anyone you feel comfortable talking with about the research and take time to reflect on whether you want to participate or not. You may ask questions at any time.

Purpose of the research

The purpose of this project is to better understand how CEOs and Executive Directors of iconic, legacy nonprofit organizations go about rebranding for renewed relevance. This information may help us to better understand successful leaders of iconic nonprofit organizations and the best practices for achieving renewed relevance through nonprofit rebranding. This research could

potentially assist with a greater awareness of the success and challenges of nonprofit leaders and increase the interest of potential organizational stakeholders in the future.

Type of Research Intervention

This research will involve your participation in an audio/video interview, looking particularly in these main areas: (1) What drove your CEO/ED to innovate and rebrand your organization and what does it mean to them personally and professionally? (2) What leadership and management steps, practices, and methods has s/he incorporated to allow the changes and reforms to be successful and why do you believe they worked? The interview will be audio and video recorded for research purposes. The staff/employee participants' contributions will be de-identified prior to publication or the sharing of the research results in so far as your name will not be used.

Participant Selection

You are being invited to take part in this research because you currently are, or have been in the past, an employee/staff member working with the CEO or Executive Director of an iconic, legacy nonprofit organization. You should not consider participation in this research if you are not able to share your experience in rebranding your nonprofit organization openly and honestly, and with full understanding that, while your name will not be used, your identity cannot be guaranteed throughout the research study.

Voluntary Participation

Your participation in this study is completely voluntary. You may choose not to participate. You will not be penalized for your decision not to participate or for anything of your contributions during the study. Your position will not be affected by this decision or your

participation. You may withdraw from this study at any time. If an interview has already taken place, the information you provided will not be used in the research study.

Risks

No study is completely risk free. However, I do not anticipate that you will be harmed or distressed during this study. You may stop being in the study at any time if you become uncomfortable or if you experience any discomfort as a result of your participation.

Benefits

There will be no direct benefit to you, but your participation may help others in the future. Additionally, I will share the results of the entire research study with you in an executive summary.

Reimbursements

You will not be provided any monetary incentive to take part in this research project.

Confidentiality

While your name will not be used, the name of your organization and the name of the CEO/ED will be used in the report and any subsequent publications or presentations. Your responses will remain anonymous and will be used along with other staff/employees. All participants in the study asked to speak about the CEO/ED leadership will remain anonymous to the extent their names will not be used in the final project.

Limits of Privacy Confidentiality

Generally speaking, I can assure you that I will keep everything you tell me or do for the study only. Yet there are times where I am required to report information I have learned through my research. Any researcher must take steps outside of the study when:

- The researcher finds out that a child or vulnerable adult has been abused

- The researcher finds out that that a person plans to hurt him or herself, such as commit suicide
- The researcher finds out that a person plans to hurt someone else.

There are laws that require many professionals to take action if they think a person is at risk for self- harm or are self-harming, harming another or if a child or adult is being abused. In addition, there are guidelines that researchers must follow to make sure all people are treated with respect and kept safe. In most states, there is a government agency that must be told if someone is being abused or plans to self-harm or harm another person. Please ask any questions you may have about this issue before agreeing to be in the study. It is important that you do not feel betrayed if it turns out that the researcher cannot keep some things private.

Future Publication

The primary researcher, Helen Lowman reserves the right to include any results of this study in future scholarly presentations and/or publications.

Right to Refuse or Withdraw

You do not have to take part in this research if you do not wish to do so, and you may withdraw from the study at any time without being affected.

Who to Contact

If you have any questions, you may ask them now or later. If you have questions later, you may contact Helen Lowman, [redacted].

If you have any ethical concerns about this study, contact Lisa Kreeger, Chair, Institutional Review Board, Antioch University Ph.D. in Leadership and Change, Email: [redacted].

This proposal has been reviewed and approved by the Antioch Institutional Review Board (IRB), which is a committee whose task it is to make sure that research participants are protected. If you wish to find out more about the IRB, contact Dr. Lisa Kreeger.

DO YOU WISH TO BE IN THIS STUDY?

I have read the foregoing information, or it has been read to me. I have had the opportunity to ask questions about it and any questions I have been asked have been answered to my satisfaction. I consent voluntarily to be a participant in this study.

Print Name of Participant_____

Signature of Participant _____

Date _____ Day/month/year

DO YOU WISH TO BE AUDIOTAPED and VIDEOTAPED IN THIS STUDY?

I voluntarily agree to let the researcher video and audiotape me for this study. I agree to allow the use of my recordings as described in this form.

Print Name of Participant_____

Signature of Participant _____

Date _____ Day/month/year

To be filled out by the researcher or the person taking consent:

I confirm that the participant was given an opportunity to ask questions about the study, and all the questions asked by the participant have been answered correctly and to the best of my ability. I confirm that the individual has not been coerced into giving consent, and the consent has been given freely and voluntarily.

A copy of this Informed Consent Form has been provided to the participant.

Print Name of Researcher/person taking the consent_____

Signature of Researcher /person taking the consent_____

Date _____ Day/month/year

Appendix E-Guidance Questions for CEO Interviews

Thank you for agreeing to participate in this study. My goal is to learn more about nonprofit leaders and their success in leading iconic nonprofit organizations to achieve renewed relevance through rebranding. You have been chosen as a participant because of what you accomplished as the CEO of _____ (name the organization here). My questions are open-ended and meant only to be a guide for our conversation. I am here to listen and know more about you, your leadership practices and the processes you used to drive change in the organization.

As you know from the consent form you previously signed, our conversation will be recorded today. Our conversation will last one hour and I will indicate the close of our time after 55 minutes.

Before we start, could you remind me again:

- How long have you been CEO of _____(name the organization)?
- Did you hold any other positions in this organization prior to becoming CEO?
- Can you tell me briefly about how your career led you to this role?
- What is your age?
- Ethnicity or race?
- Sex?

When you think about your experience leading change, and creating efficiencies and innovation at _____(name of the organization), what stands out in your mind?

- Can you think of a specific experience and describe it to me?
- What were you aware of at the time?
- Is there anything else?

What leadership traits do you believe made your reform efforts successful?

If I was in your office and observed you "leading change," what would I see?

- Could you tell me more about your thinking on that?

Can you talk about how the culture of your stakeholders impacted your rebranding and change decisions?

- Internal stakeholders? Staff? Board of Directors?
- External customers? Clients? Donors? Members?
- Could you tell me more about your feelings on this?

Are there any specific strategies, tools, or methods you used that were highly effective in rebranding for renewed relevance?

- What else?

Is there anything else you wish to add to our conversation today or anything else you would like for me to know for this research?

Thank you so much for your generosity and consideration. I have thoroughly enjoyed our time and am grateful to you for your participation. Please feel free to be in touch with me at any time if you have any questions or wish to discuss the research further.

Appendix F-Guidance Questions for Employee Interviews

Thank you for agreeing to participate in this study. My goal is to learn more about nonprofit leaders and their success in leading iconic nonprofit organizations to achieve renewed relevance through rebranding. You have been chosen as a participant because of what your CEO accomplished while working with you at _____ (name the organization here). My questions are open-ended and meant only to be a guide for our conversation. I am here to listen and know more about [Name of CEO], his/her leadership practices and the processes s/he used to drive change in the organization.

As you know from the consent form you previously signed, our conversation will be recorded today. Our conversation will last one hour and I will indicate the close of our time after 55 minutes.

Before we start, could you remind me again:

- How long have you been an employee of _____(name the organization)?
- What positions have you held in this organization?
- Can you tell me briefly about how your career led you to this role?
- What is your age?
- Ethnicity or race?
- Sex?

When you think about your experience working with [name of CEO/ED] leading change, and creating efficiencies and innovation at _____(name of the organization, what stands out in your mind?

- Can you think of a specific experience and describe it to me?
- What were you aware of at the time?

- Is there anything else?

What leadership traits do you believe made [name of CEO/ED]'s reform efforts successful?

If I was in your office and observed him/her "leading change," what would I see?

- Could you tell me more about your thinking on that?

Can you talk about how the culture of your stakeholders impacted [name of CEO/ED]'s rebranding and change decisions?

- Internal stakeholders? Staff? Board of Directors?
- External customers? Clients? Donors? Members?
- Could you tell me more about your feelings on this?

Are there any specific strategies, tools, or methods [name of CEO/ED] used that were highly effective in rebranding for renewed relevance?

- What else?

Is there anything else you wish to add to our conversation today or anything else you would like for me to know for this research?

Thank you so much for your generosity and consideration. I have thoroughly enjoyed our time and am grateful to you for your participation. Please feel free to be in touch with me at any time if you have any questions or wish to discuss the research further.

Appendix G-Daniel Obst and AFS International Intercultural Programs

As the train traveled to New York City's Grand Central Station from my home in Connecticut, the leaves were beginning to change colors showing off the vibrant reds, browns, and greens before falling to the ground and covering the landscape. Unlike any other city on earth, New York hits you in the face at each turn inciting an adrenaline rush even for the most calloused New Yorker. Skyscrapers tower above the masses of people speaking dozens of languages as they rush to get to the next place they are going. On this crisp, fall day I visited Daniel Obst in the AFS International Intercultural Programs offices on 23rd Street and 6th Avenue. Approximately eight years ago, I left my employment at AFS-USA. My fondness for the people and mission of AFS remains and I had heard wonderful things about Daniel's leadership over his two years at the helm.

When you enter the 6th floor AFS International offices, there are maps of the world and photos of international students covering the walls. Desks are set in corrals rather than in rows implying a level of collaboration between international teammates. My former AFS-USA colleague, Paul, Daniel's assistant, greets me with a huge hug and we catch up quickly while walking towards Daniel's office. Another past collaborator hears my voice and comes out to ask why I am there. I describe my PhD research and why I am interviewing Daniel, their President and CEO.

AFS Intercultural Programs has historical ties back to 1914 and the outbreak of World War I when A. Piatt Andrew, former director of the United States Mint and assistant professor of economics at Harvard University, decided to travel to France to volunteer as a driver at the American Ambulance Hospital. Over time, he negotiated with the French Army to allow some ambulance drivers to work closer to the front lines, establishing the American Ambulance Field

Service. In 1917, when the United States entered the war, the organization shortened its name to the American Field Service (AFS) and was absorbed into the United States military by the end of the same year. In 1939, under the leadership of Director General Stephen Galatti, AFS was reactivated after the start of World War II. By the end of the second war, 2,196 ambulance drivers had carried more than 700,000 wounded.

After witnessing the horrors of both World Wars, the American Field Service (AFS) volunteers founded a secondary school student exchange program in 1946, in order to perpetuate international friendships and create peace. The next year, the initial group of AFS participants arrived in the United States from France, Czechoslovakia, the Netherlands, Norway, England, and Syria. Many years later, in 1970, AFS began to allow students to travel to and from countries other than the United States, beginning the AFS Multinational Program. Subsequently, in 1993, AFS officially created an independent partnership structure based on their "Articles of Partnership" allowing AFS country programs to become distinct legal entities separate from the United States.

This history of AFS Intercultural Programs is important for several reasons. One, understanding that it was born from an American military organization allows me to better appreciate the challenges the organization faces today. Also, I know from my own personal experience working and volunteering at AFS-USA from 2004-2012, the organization honors its history and the volunteer ambulance drivers who started it, seriously and with great veneration.

Today the organization's website states "AFS Intercultural Programs is an international, voluntary, non-governmental, non-profit organization that provides intercultural learning opportunities to help people develop the knowledge, skills and understanding needed to create a more just and peaceful world. By linking our 'learning to live together' philosophy to the

defining global issues of the 21st century, AFS is dedicated to building an inclusive community of global citizens determined to build bridges among cultures" (AFS,n.d., para 2). AFS students who take part in the programs go abroad for several months to a year, staying with host families who open their homes to the exchange students. In 2016, the AFS partner network sent approximately 12,000 students to 94 countries worldwide (2016 Annual Report of AFS Intercultural Programs, p. 2).

In November 2016, AFS Intercultural Programs announced the appointment of Daniel Obst as President, Chief Executive Officer, and member of the AFS Board, describing him as a "creative thinker and collaborator charged with leading a global movement to educate citizens" (Miladinovic, 2016, para 1). The announcement of Daniel's appointment explained his responsibility being the oversight and direction of the future strategy of AFS. The quote attributed to him in the announcement reads, "I am energized and motivated by the history and legacy of AFS. In these times of great uncertainty, the world needs more intercultural engagement—and AFS with its incredibly strong volunteer culture is well positioned for growth and leadership in fostering intercultural competence around the world" (Miladinovic, 2016, para 11).

Born in Berlin, Germany, Daniel initially came to the United States for one year of high school in the 11th grade. His family was extraordinarily diverse, even by today's standards, with his German mother, American father, adopted sister from India and two adopted brothers from Cambodia and Colombia. Even now, I can still see hints of the young German boy behind his present-day square face, blond hair, blue eyes, and everyday formality of suits and ties. Today, Daniel lives in Brooklyn, New York with his husband Matthew.

Prior to becoming the President and CEO of AFS Intercultural Programs two years ago, Daniel was Deputy Vice President for International Partnerships at the Institute of International Education. In that role, he led the launch of Generation Study Abroad, mobilizing 700 international partner organizations with the aim of doubling the number of Americans who study abroad. Under his leadership, partners pledged more than $185 million to support the effort. With all of this in mind, Daniel was the perfect choice to take AFS Intercultural Program into a new era, increasing the relevance of international exchange programs as the global community becomes more siloed and restricted.

AFS Intercultural Programs, or AFS-International, as the umbrella organization for approximately 100 independent nonprofit organizations around the world, receives most of its funding from fees paid by its members based on the number of students they send and host within the AFS network. Each student pays the sending country organization, which recruits the student, and the sending country organization subsequently pays the hosting country organization and AFS-International based on these results. Along with declining numbers in study abroad, AFS Intercultural Programs has seen its budget being reduced year after year, according to its publicly filed IRS forms. With this in mind, there must be great pressure on Daniel to innovate and ignite study abroad programming to create demand around what AFS offers and sells.

Daniel is always in his signature suit and tie, and today is no exception. There is no photo on the internet or in any printed materials showing him dressed any less formally. Despite the formality of his dress, he greets me with a large smile and hug. While I have never before met Daniel, there is a comfort amongst AFSers. An AFSer, as we are called, is anyone who has worked for or participated in an AFS exchange program. He explains the metaphor for his dress saying, "…don't be fooled by my outfit. I like wearing suits. And to a certain extent, I would

say, I use it also as a signal that we are a powerful organization…we're very internally focused at AFS and one of my priorities was to be more externally focused. So sometimes it helps to look different."

Entering his office, Daniel and I immediately start to talk as I set up my video and audio equipment. His office is a blend of historical AFS artifacts and modern office furniture. An entire wall has become a white board full of multi-color diagrams, drawings, and scribbles representing new ideas and thought processes. When Daniel decided to change the furniture and look of his office from the traditional dark wood desk he inherited, he wanted to reflect a new, modern AFS while still valuing the history that comes with a legacy nonprofit. Outside a cracked window, sirens wail as we begin the interview.

Daniel describes himself as an outsider to AFS because he previously had no affiliation with the organization through employment or program participation. Initially he worried he might "mess up the brand" or fail to truly understand it. He "took courage" the board of directors wanted to hire an outsider, someone with industry experience who understood the mission of the organization and could develop a strategy around it. He understands the board chose him for what he brings to the organization in leadership, strategy, and new ideas.

As Daniel talks about his leadership and the rebranding effort he has implemented at AFS, it is with confidence and humility. Several times during our interview he focused on two main themes. First, he focused on the new strategy he has put in place across the AFS network. This new strategy has been the all-consuming center of his two years at AFS and he has successfully rallied the network partners to embrace it. He says about his future legacy, "To me, the legacy needs to be the results of the strategy…it is really kind of leading the organization into a new future…that's both big and bold." He understands how it is his role to see the big picture

for the betterment of the entire network, despite what may be challenging for individual national AFS organizations.

Second, and very much tied to the first, he focused on the importance of the organization in terms of the network partners and the people they serve. AFS-International would not exist without these partner organizations and he is aware of that reality in the emphasis he places on how this federated network moves forward as a unified whole. When I ask Daniel about the challenges of bringing together a multicultural organization under a single strategy he explains, "One of the core principles in the strategy is this notion of one AFS, right? We are a decentralized network of technically independent nonprofit organizations, with their own boards and their own countries. But, of course connected with a common brand. But there's been a lot of challenges around this…it felt incredibly fragmented. So, this notion of one AFS became a core principle in the strategy. And I was surprised to see how much it galvanized and energized people. Because to the outside, it shouldn't matter how we govern or how we're operated. It needs to be one organization. So, it's like, basically, one AFS to, you know, double down. Our impact grew more than the sum of our parts. So that became a core piece."

The notion of trust among a network of federated partners is not lost on Daniel and he intends to ensure the partners can count on one another to achieve what is laid out within the agreed-upon strategy. "Solidarity doesn't necessarily mean solidarity with an individual or an individual organization, but it is solidarity with the people you serve in the overall network," explains Daniel. In his rebranding efforts, he believes the entire network must reflect the same brand and be held to the same strategy and goals.

The emphasis on the new strategy and the organizational whole is reflected everywhere throughout AFS, from posters on the wall to the annual report. The 2017 Annual Report highlights the three strategic impact goals as described by Daniel:

- Develop active global citizens-We develop responsible citizens of all ages through intercultural learning to take action in their communities and the world.
- Globalize schools and institutions-We support and equip educators, schools, institutions and other organizations in delivering effective intercultural learning programs that build global competence.
- Expand access to intercultural education-We expand community outreach and provide more scholarships to ensure that more people from diverse and underserved communities participate in and benefit from AFS programs and initiatives.

It is obvious to me why Daniel exudes pride when he speaks of the new five-year strategy. It is a beautiful thing to behold. Not only because it is full of photos of happy exchange students around the world, but also because of the incredible work that goes into creating a plan that 60 distinct cultures and countries must agree upon. While the strategic plan was not up for a vote among the members of the AFS network, Daniel did ask each of them to sign it. "I needed to get a sense of real commitment from the individual organizations. So we issued….the AFS Declaration of Accra that laid out the core impact and key principles that are in the strategy and everybody literally signed it," describes Daniel.

Daniel is striving for AFS to be more than just a global leader in high school exchange. He wants AFS to be the world's thought leader in international education through his efforts at rebranding the organization. "From my perspective, [thought leadership] does two things," says

Daniel. "First of all, you get better recognition…what is really important to me is that our peers, our competitors, you know, our potential funders know that we do see ourselves not just as a powerful organization and thought leader, but also as an innovator of programmatic activities…And the second part of what it does is that it changes the way internally you look at things. And partly because of taking a much more customer centric view of all our work. If you develop the muscle of being more external, you start listening more to the people you serve, rather than doing the things you did because you always did that. Or because the founders of the organization had a certain priority, or whatever. So, you're pivoting your attitude towards program design."

As is the case with anyone who has ever been involved with AFS, Daniel cannot talk about the organization and its future without focusing on the history and the mission. His clarity around the importance of these two aspects of the organization is obvious in how he describes his initial onboarding. "I learned that people in AFS really like the history…the good, the bad, and the ugly…and maybe there's something related to lots of sacred cows," says Daniel. This early impression felt like a resistance to change to him but he has not seen it play out in that manner. Perhaps his awareness of the importance of the organization's history has led him to always keep the narration in mind, committed to acknowledging and recognizing the ambulance drivers and other past achievements.

In this vein, Daniel made the decision to "double down on the mission" and not change it in his efforts at rebranding. He describes how the mission of AFS is relevant today through its focus on peace, "Peace 75 years ago meant absence of war, it meant international exchange, international dialogue between different countries. And to me now, peace is much more around sustainable development and how you protect the world. How do you get…everyday citizens

involved in more peace and justice and so on? And so to me, what's the pivot of where you could innovate? You don't mess with the mission. But you take it as an opportunity to actually make the organization relevant for today, based on an old mission."

As he talks, Daniel makes a point to mention the AFS Board of Trustees several times throughout our interview. He acknowledges the importance of their participation in how he leads the organization through this phase of strategic change and rebranding. He specifically mentions the value some of the newly elected trustees have brought to the table, as well as his strong, effective relationship with the board chair. He describes advice he received from a trustee to build a case for change as the "single most influential thing we did in the network." At the recommendation of this trustee, Daniel presented a formal case for change within a PowerPoint deck that outlined, based on facts, the challenges, operational issues, and strengths of AFS. In his mind, the information "galvanized pretty much everyone because a lot of the stuff was pretty eye-opening. And they hadn't seen that before."

The strong focus on internal communications is an area he has focused on during his tenure thus far. When he came into the CEO role, the network expressed dissatisfaction with AFS-International's lack of transparency. Daniel understands there may not be merit behind these opinions, but also realized he needed to respond. Regarding his response, he says, "We now have portfolio managers who deal on a monthly basis with every single partner, we have much more consistent messaging, more transparency, we have town halls, all these things that didn't really exist before. And I think that has helped move the organization together in the same direction. Internal communications, I think, was initially my key focus."

Overall, Daniel impresses as a leader who knows exactly where he is headed. And he has the strategy to get there. When I ask him about his leadership traits, he references back to the job

description from which he was recruited. He refers to his excellent listening skills, communication skills and ability to build consensus. "In a disparate network, it was really important to [build consensus]. And I think for the office here, my actual direct team, it was really important to build a sense of teamwork," he explains. His notion of co-creation is one that plays heavily in the implementation of the strategy he has designed. "We use the concept of co-creation on all our strategy projects in the whole network. So basically, we have defined which projects and actions we need to take in order to achieve our strategy. And every project will be essentially led by a sponsor but will be made up of partners from the broader network and other experts and stakeholders."

Daniel's vision for AFS is one of renewed relevance, innovation, and an expanded impact on the world. He is extremely focused on those he considers to be the organization's customers. He describes, "two categories of external stakeholders. One is the group of people who are directly involved in our programmatic activity….the volunteers, the parents, the participants and so on. The other group are our peer organizations, our broader community that we operate in." His focus on the AFS customer drives him to want to take a "real deep dive" into what the participants want and schools need, in addition to positioning AFS as a leading international education organization.

As I leave the AFS-International offices, I stop at the office of a past colleague. Noah (not his real name) has been the Chief Operations and Financial Officer for AFS-International for fourteen years. He has committed much of his life and career to the success of the organization developing tools and structures currently being used on a global scale. As I ask him how he is doing, he tells me he will be retiring the following Wednesday. Since I went to work at AFS-USA in 2004, I have never known AFS-International without Noah. His impact on AFS will

always be legendary and enduring. He looks just a little sad to me describing how the next phase of his life will include a lot of music, and a potential move back to his home country of Switzerland at the request of his wife. As we talk, I think we both know the future of AFS is not with Noah. He holds a part of the history. Neither of us explicitly say what we are thinking about why Noah decided to retire at this time. Change is always the hardest for those who have been around the longest. But it is clear to me the future of AFS is bright and is being held in safekeeping back in the office where I left Daniel.

Appendix H- Glossary of Terms

Brand-A nonprofit organization's brand is everything a person thinks about when the nonprofit comes to mind including the cause, its products, services, and mission.

Case Study Research-The up-close, in-depth study of a person, place, or organization. Portraiture methodology is a type of case study research.

Change Leadership-Change leadership is the ability to influence and enthuse others through personal advocacy, vision, and drive, and to access resources to build a solid platform for change (Higgs and Rowland, 2000).

Chief Executive Officer (CEO)-As the top-level leader of a nonprofit organization, the CEO defines the direction and the path for the organization's stakeholders. S/he determines the interpretation of the mission and is a part of the organizational brand. For the purposes of this research, the terms CEO and ED will be used interchangeably.

Executive Director (ED)-As the top-level leader of a nonprofit organization, the executive director defines the direction and the path for the organization's stakeholders. S/he determines the interpretation of the mission and is a part of the organizational brand. For the purposes of this research, the terms CEO and ED will be used interchangeably.

Gross Domestic Product (GDP)- the total value of goods produced, and services provided in a country during one year.

Iconic- Merriam-Webster defines iconic as "a**:** widely recognized and well-established, and b**:** widely known and acknowledged especially for distinctive excellence" (Merriam-Webster, 2018, para 1). I have chosen to limit my research to non-profits, which are well-known and recognized, founded prior to 1960 and are based in the United States. For the purposes of my research, I will use the terms legacy and iconic interchangeably.

Legacy- Merriam-Webster defines legacy as "of, relating to, associated with, or carried over from an earlier time, technology, business, etc." (Merriam-Webster, 2018, para 6). I have chosen to limit my research to non-profits, which are well-known and recognized, founded prior to 1960 and are based in the United States. For the purposes of my research, I will use the terms legacy and iconic interchangeably.

Practical Significance-the value placed on real-life.

Relevance- To be relevant, a nonprofit organization must be able to supply up-to-date, significant, and demonstrable services, resources, and information that satisfies the needs of the organization's stakeholders.

Rebrand- In some cases, particularly with older nonprofits, rebranding is part of the effort to increase relevance. A nonprofit's brand is everything that comes to mind about the organization when it is thought about or mentioned. Therefore, to rebrand is to adjust or change the brand to change the image to one more attractive or significant to today's society.

Rigor-thorough, correct, and controls potential bias.

Small- to medium-sized nonprofits-Organizations with less than 100 million dollars in annual gross receipts.

Social Conscience-the collective consciousness of a society reflected in a collective identity, self-awareness, and unified goals.

Social Sector- For the purposes of this research, a social sector organization will be considered to be: a) private, i.e., not controlled by government; b) primarily serving a social or public purpose, i.e., their main purpose is to produce public or collective goods for others rather than to maximize returns to invested capital or to members or directors; and c) voluntary and without compulsion (United Nations Department of Economic and Social Affairs, 2018). The social

sector around the world uses different terms including nonprofit, nongovernmental organization, charity, and more. Each is only slightly different in their structure and funding sources. Utilizing these three criteria, as outlined above, allows the incorporation of all types of organizations within the social sector, accounting for the entire sector without bias as to their funding source. Additionally, the various terms used in the social sector will be used interchangeably through this learning achievement, as is often the case when researching this subject.

Theoretical Significance-the value placed on the existing body of research.

Appendix I-Table Permissions

ANTIOCH UNIVERSITY

Helen Lowman <[redacted]>

Requesting permission for use in PhD dissertation
2 messages

Helen Lowman <[redacted]> Wed, Mar 4, 2020 at 8:52 AM
To: [redacted]

Dear Lisa,
Thanks so much for responding to my LinkedIn request. As I mentioned, I am a Ph.D. candidate at Antioch University's Graduate School of Leadership and Change. I am writing to you to request permission to reproduce a table from "The Nonprofit Sector: Examining the Paths and Pathways to Leadership Development," by Lisa Jiang, 2008, *Wharton Research Scholars, 51*. The original table appears on page 9 (https://repository.upenn.edu/cgi/viewcontent.cgi?article=1053&context=wharton_research_scholars). For the purposes of my request, I include screenshots of the original table and the adapted version I am asking to put in my dissertation. Thank you for your consideration of my request. If you have any questions or would like any further information, please let me know.
Warm regards,
Helen

Wharton_Research_Scholars.docx
150K

Lisa Jiang <[redacted]> Wed, Mar 4, 2020 at 3:31 PM
To: Helen Lowman <[redacted]>

Looks good. Thanks!

REPRODUCED VERSION
Table 3 Comparison of Old Versus New Model of Nonprofits

	Old Model	**New Model**
Inbound Logistics (input)	• Heavily government supported • Mainly fundraising	• Growth in fee-income services • Corporate partnerships
Operations/Work	• Grassroots operations, Activism	• Greater engagement with market systems (commercialization of nonprofit sector • Nonprofit and for-profit lines blurred
Outbound Logistics (output)	• Limited measurement • Anecdotal	• Expectations of measurement and metrics • Heavily evaluative
Marketing and Sales	• Limited	• Marketing – branding and advertising more common • Differentiation/Developing market niches
Service offering	• Varies	• Varies but more "social purpose enterprises" and "social ventures"
Procurement/Partners	• Government and local communities	• Increased corporate involvement
Technology	• Limited	• More advanced, though still less compared to for-profit
Human Resource Management	• Primarily focused on hiring and minimal effort in training and development • Tenure-based promotions	• More structured, thoughtful • Larger organizations have systems in place and specific individuals devoted to hiring • Creation of professional development and capacity building • Performance-based hiring
Firm infrastructure (organizational structure, culture)	• Grassroots mentality, individual operations • Founders are still running organizations	• Engaged with other nonprofits and other sectors • Increased professionalism, entrepreneurial • More intricate organizational structure

Note. Reproduced from "The Nonprofit Sector: Examining the Paths and Pathways to Leadership Development," by Lisa Jiang, 2008, *Wharton Research Scholars, 51,* p. 9.

ORIGINAL VERSION

Table 1. Comparison of old versus new Model of Nonprofits

	Old Model of NPOs	New Model of NPOs
Inbound Logistics (inputs)	-Heavily government supported -Mainly fundraising	-Growth in fee-income services -Corporate partnerships
Operations/Work	Grassroots operations, Activism	-Greater engagement with market systems (commercialization of nonprofit sector) -Nonprofit and for-profit lines blurred
Outbound Logistics (output)	-Limited measurement -Anecdotal reporting common	-Expectations of measurement and metrics -Heavily evaluative
Marketing and Sales	Limited	-Differentiation/Developing market-niches -Marketing – branding and advertising more common
Service offering	Varies	Varies but more "social purpose enterprises" and "social ventures"
Procurement/Partners	Government and local communities	Increased corporate involvement
Technology	Limited	More advanced, though still less compared to for-profit
Human Resource Management	-Primarily focused on hiring and minimal effort in training and development -Tenure-based promotions	-More structured, thoughtful -Larger organizations have systems in place and specific individuals devoted to hiring -Creation of professional development and capacity building -Performance-based hiring
Firm Infrastructure (organizational structure, culture)	-Grassroots mentality, individual operations -Founders are still running organizations	-Engaged with other nonprofits and other sectors -Increased professionalism, entrepreneurial -More intricate organizational structures

Request for Permission to Adapt and Use in PhD Dissertation

Inbox

Helen Lowman <[redacted]> Jan 13, 2020, 6:27 AM

to permissions

Rights & Permissions Office
Brookings Institution Press
Attn: Kristen Harrison
1775 Massachusetts Avenue, N.W.
Washington, D.C. 20036-2188
Fax: (202) 536-3623
permissions@brookings.edu

Dear Kristen,
My name is Helen Lowman and I am a Ph.D. candidate at Antioch University's Graduate School of Leadership and Change. I am writing to you to request permission to adapt and use a table from the book The State of Nonprofit America, Salamon, Lester M. Salamon, Brookings Institution Press. The original table appears on page 605. For the purposes of my request, I include Kindle screenshots of the original table and the adapted version I am asking to put in my dissertation. You can find both in the attached document. Thank you for your consideration of my request. If you have any questions or would like any further information, please let me know.
Warm regards,
Helen

Attachments area

Helen Lowman <[redacted]> Feb 28, 2020, 2:15 PM (10 days ago)

to communications, permissions

Dear Kristen,
I am following up on a request I sent on January 13 requesting permission to use a table in my dissertation. Can you please let me know the status of my request and when I might receive an answer?

Thanks so much,
Helen

Permissions

Feb 28, 2020, 2:42 PM (10 days ago)

to me, Communications

Hi Helen,

I can't seem to find your email from 1/13. Would you mind resending the document? I will take a look this afternoon.

Thank you!

Kristen

Kristen Spina Harrison
Rights Manager and Editorial Associate, Brookings Institution Press
BROOKINGS, 1775 Massachusetts Ave. NW Washington, DC 20036
Email [redacted]
http://www.brookings.edu

Helen Lowman <[redacted]>

Feb 28, 2020, 3:56 PM (10 days ago)

to kharrison, permissions

Thanks so much Kristen. Here's my original message with attachments. I appreciate your help so much!

Attachments area

Kristen Harrison

Mar 2, 2020, 3:10 PM (7 days ago)

to me

Dear Helen,

Thank you for resending. Permission is granted to include the adapted table from *The State of Nonprofit America* in your dissertation. Please let me know if you need anything else.

Cheers,

Kristen

Kristen Spina Harrison
Rights Manager and Editorial Associate, Brookings Institution Press
BROOKINGS, 1775 Massachusetts Ave. NW Washington, DC 20036
Email [redacted]
http://www.brookings.edu

Helen Lowman <hlowman@antioch.edu> Mar 4, 2020, 9:50 AM (5 days ago)

to Kristen

Thanks so much Kristen! Have a great day, Helen

ReplyForward

ADAPTED VERSION FOR DISSERTATION

Table 4 Nonprofit Organization Accountability

	Voluntarism	**Professionalism**	**Commercialism**	**Civic Activism**
To whom are nonprofits accountable (stakeholders)?	• Value based communities such as advocacy groups or religious groups • Volunteers • Individual donors and members	• Professional staff • Professional associations • Clients • Industry groups • Government funders and institutional donors	• The marketplace • Strategic partners and investors, venture philanthropists, social entrepreneurs • Clients and beneficiaries	• Citizens, volunteers, and supporters • Coalitions and partner organization • Beneficiaries of nonprofit's mission
What are nonprofits accountable for (performance expectations of stakeholders)?	• Providing a vehicle for the expression of values in the social sphere • Embracing value-based explanations of social problems and issues • Transforming the lives of individuals in the short term through material assistance or values counseling, and in the long term through personal transformation and self-help • Proving a way to reduce the role of	• Accomplishing the mission via theory-based services and logic models • Results and outcomes that are empirically validated • Continuous organizational learning and improvement • Meeting professional guild standards of individual performance • Meeting industry standards of organizational performance	• Growing the organization's market share, sales, vouchers, and financial sustainability; leveraging external investments; generation of community wealth • Social return on investment • Exploitation of niche markets and leveraging the comparative advantage of the organization • Accountable for spawning the	• Changing the allocation of valued goods in society and the rules by which those goods are allocated

	government in the lives of people	Meeting standards of good governance, efficiency, ethical management	entrepreneurial culture through replication, franchising, or other growth strategy	
Challenges to effective accountability	• "Soft" data on outcomes that are based on anecdotes of individuals who have been transformed by their encounter with the nonprofit • Concerns about government and donor support	• Replication of professional and industry standards across many organization, which may stymie innovation, lead to organizational isomorphism, and push organizations toward measurable short-term results and away from long-term advocacy and social change	• Market incentives and partners, possibly leading to mission drift and loss of nonprofit's distinctiveness	• Holding people and organizations accountable in informal, consensual, and networked-based structures

Note. Adapted from "Accountability in The Nonprofit Sector," by Kevin P. Kearns, 2012, in Salamon, L. (Ed.) *The State of Nonprofit America,* p. 605.

ORIGINAL VERSION FROM THE STATE OF NONPROFIT AMERICA

Table 16-1. Accountability and the Four Impulses

	Voluntarism	*Professionalism*	*Commercialism*	*Civic activism*
To whom are nonprofits accountable (stakeholders)?	Value-based communities such as advocacy groups or religious groups, who bring passion and conviction to bear on the mission of the organization (for example, YMCA, Catholic Charities). Volunteers, who have historically provided a significant portion of the human capital for nonprofit organizations Individual donors and members, who voluntarily provide support for the mission	Professional staff, who bring specialized skills to bear on the mission Professional associations that exert a guild philosophy (for example, "best practices") on professionals who work in the sector Clients, who are increasingly knowledgeable about the services they receive and demand professionalism Industry groups that promulgate and enforce performance standards Government funders and institutional donors, who demand professional approaches to the mission	The marketplace, by pursuing missions that not only meet a need (gap in services) but also respond to a market demand (someone is willing to pay to fill the gap) Strategic partners and investors, venture philanthropists, social entrepreneurs, and others who expect a social return on their investment Clients and beneficiaries, who expect to be treated like customers	Citizens, volunteers, and supporters who view nonprofits as a vehicle for social change Coalitions and partner organizations that seek complementary outcomes Beneficiaries of nonprofit's mission, including future generations
What are nonprofits accountable for (performance expectations of stakeholders)?	Providing a vehicle for the expression of values (including religious values) in the social sphere Embracing or at least accommodating value-based explanations of social problems and issues	Accomplishing the mission via theory-based services and logic models derived from professional standards (secular versus value-based) Results and outcomes that are empirically validated and address causes as well as symptoms of problems	Growing the organization's market share, sales, vouchers, and financial sustainability; leveraging external investments; generation of community wealth Social return on investment	Changing the allocation of valued goods in society and the rules by which those goods are allocated
	Transforming the lives of individuals, in the short term through material assistance or values counseling, and in the long term through personal transformation and self-help Providing a way to reduce the role of government in the lives of people	Continuous organizational learning and improvement Meeting professional guild standards of individual performance such as certification, licensing Meeting industry standards of organizational performance such as accreditation Meeting standards of good governance, efficiency, ethical management such as codes, and financial probity	Exploitation of niche markets and leveraging the comparative advantage of the organization Accountable for spawning the entrepreneurial culture through replication, franchising, or other growth strategy	
Challenges to effective accountability	"Soft" data on outcomes that are based on anecdotes of individuals who have been transformed by their encounter with the nonprofit Concerns about government support (for example, separation of church and state)	Replication of professional and industry standards across many organizations, which may stymie innovation, lead to organizational isomorphism, and push organizations toward measurable short-term results and away from long-term advocacy and social change	Market incentives and partners, possibly leading to mission drift and loss of nonprofit's distinctiveness	Holding people and organizations accountable in informal, consensual, and networked-based structures

Source: Author's compilation.

Note. Reprinted from Salamon, Lester M. The State of Nonprofit America (p. 605). Brookings Institution Press. Kindle Edition.

Appendix J- Supplemental Files Transcripts

Jim Clark (Jim.mp4)

The short story is when I was in the for-profit world business I got involved with Boys & Girls Clubs really through the simple notion that our future workforce was sitting right in front of us. And it was, in this case, urban Milwaukee. And my thought was basic in the sense that if we could make sure that these youth were prepared for the future -- and this was such a great pool of young people -- that we would have a great viable workforce. That was really kind of the notion of how I got involved as a volunteer to start with. Then quickly saw the transformational power of the Boys & Girls Clubs and really the impact that they have on kids, their families, their extended families, neighborhoods, communities, and how important this was to the fabric of any community.

I was a volunteer for probably, I don't know, 8 to 10 years. And then over the course of time, there was a transition at the Boys & Girls Clubs in Milwaukee. The short story, that board, which I knew, a lot of those folks reached out and said, “Hey, we need some help. This transition would be kind of cool for you and to marry your passion with your profession. So, I did. Then one thing led to another and a call came from Boys & Girls Clubs of America, and so here I am.

I think change agility and change management and leading change is kind of what society is today. I think the notion that changes take place and then things go back to some level of normalcy or that we're at this new plateau and that's where we stay and stabilize, those days are gone. Change is a constant, I guess, is what I'm leading into here. Recognizing that is important.

Then I think the whole process of change takes on different life forms. It could be very rigorous in some forms when it comes to project management type approaches. Which is one of the things we installed here to really look at the tactical side of initiatives when it comes to

change, which I think was important. Things from the project charter to executive sponsors to the work team that was going to implement. But I would put that more on the tactical side. To deal with that, we formed a planning and operations council here, which we didn't have before, to really focus on some of the, again, initiatives inside of the agenda.

As you think about strategic plans, too many times they get developed and put on a shelf and they sit there and business goes on or things happen as they were, and really, there's no change. I took it seriously that, look, we've got a strategic plan here and is our organization aligned to deliver on this strategic plan? This wasn't just me; it was our senior team and our board looking at this. We all said, “No, we're not. We need to do some things differently if we're going to be able to deliver on this vision and direction of this strategy.”

I start, literally, with our strategic plan, every staff meeting, all of my meetings. We break it down by, not just the big goals, but what do we need to do to make sure we're supporting those goals and resourcing those goals or those pillars. Then each week, how are we doing against that? What do we need to do differently? Can we see the measurable results here or not? Then what do we need to change?

It leads to another thing; you have to be decisive. I think we get really caught up in -- this is a complex, sophisticated enterprise. It has tentacles all over the place. You're not going to be perfect, but you've got to make decisions. The worst thing is being indecisive because everybody gets paralyzed and it just, again, old adage, trickles right down. I try not to linger. Now, bigger decisions, of course, you want to be as informed as possible, but a lot of stuff, “Let's just move. Let's go and move out on this.”

Then it was the execution. We changed so much in terms of how we operate and how we go to market and what we do. There's the internal piece and then we have a huge affiliate

network of 1,100 affiliates across the country. So, this wasn't just a national Boys & Girls Club of America plan, this is a movement-wide, enterprise-wide plan. This communication track or internalization ownership is equally significant outside of the national organization. That takes time and repetition. A lot of repetition and communication.

Then it was this notion of casting the vision of what we want to look like, a lot of communication and then dealing with the change itself. Because too many times -- and we are. This organization is very good at leading up to the change and executing the change, and then it kind of stops.

If you look up some of the basic steps of change management, that's certainly what we did. But I would say the big pivot, at least, in this organization was aligning our service and our support, if you will, to the tentacles or priorities of the plan. I think that's probably the number one big shift that took place. Then, again, the rest is how we went about it.

Transparency, I think, is another important thing that I focus on. Not easy because there are certain things that you just really can't talk about. But to the large degree, most you can, and trying to be really focused on extreme transparency, and then communication. Once you think you've communicated, do it again and again. Yet, in today's technology world, I think we are inundated with too much so you've got to be really acute and pinpointed. It's not one form. It's being present, visible in front of staff, or whatever your constituent group is. So, this whole active engaged communication, I think, has been something important to me as I go forward.

I use this kind of lead with the heart approach. Put myself in their shoes. I would never ask anybody to do anything I wouldn't first do myself. I do that. I try to be the servant leader. I believe that's important. Sometimes that can get twisted upside down, so you got to manage that.

And lead by example. Again, old adages, but I think too many times leaders lose sight of those things. If you look at it, the principles or whatever you want to call it, competencies, they're no different than what they've been over time. I think, we just get twisted up sometimes on them and lose sight of what that is.

I pay tribute to the past. Because as you're making changes, it's important that the legacy or some of the individuals, people, that have been here a long time see that you're not just destroying in the process of change, but that you are celebrating what got you to where you are today. Paying attention and celebrating history and bringing the best of your past forward with you and bringing in then the best of the future that has to offer. That's culture. This is part of our culture. We are a legacy institution. We've been around 159 years so there's a lot that gets passed on, good and bad, but there's a lot that gets passed on. But I pay very close attention to this historical piece of this place.

Culture change doesn't happen overnight, it takes years and years to do. Again, an example here that I brought in was; let's create what our values are going to be in this culture and then shape what our behaviors are and how we go about our work around these values so that our culture evolves to where we want it to be. I didn't create the values. We got a team of 50-some people together to do this. And they're "I Care," they're sitting right there, they're in every meeting room, they're all over the place. We said this is what we want to believe in, and now let's start moving there.

It's a journey, and it takes time. this is something that we all live by. It tests us sometimes, as you can imagine, but that's a good thing. That's a good thing. This is all about bringing people along with you. At times, you're in lockstep and at times, you're not, but the better you can get at bringing people along, the better off you are. Whether that's through

communication or interaction or behaviors or symbols or whatever, I think it's really, really important.

Take time to really explain the “why” because if you missed that, it doubles the execution phase. It doubles it. The clearer everybody is on why we need to do this, the better off. It's easier in nonprofits, by the way. Mission-based are much easier to get there or quicker to get there. I think, whatever the shifts are, working and focusing to keep people updated as you go. I think, as I said earlier, too many times we do a good job getting there and executing, and then we just kind of like, “Okay, what's next?” so revisiting and having time to reflect, celebrate and/or change, if we have to or repurpose.

To me, it's pretty simple that in life, I believe there's only two ways to go no matter what the topic is; personal, professional or whatever you're doing, and it's either up or down and I'm just not interested in down and nor are the kids and teens that are served at Boys & Girls Clubs. Because down means something worse than what they have today and that's not what we're all about.

Look, leadership is a privilege. It's an honor, certainly in this enterprise to lead a movement, a mission like this. It is very special and I take it very seriously. I think first and foremost, whether it's a trait or just a conscientious part of what I believe in is I take leadership seriously. I understand the responsibility and the accountability that comes with this. I say that a lot.

John Hewko (John.mp4)

Sort of going back, I’m a lawyer by training and after graduating from law school, I went down to Latin America for a few years and practiced for a year in Argentina and a year in Brazil with local law firms and then came back to Washington and joined the DC office of a large Los

Angeles firm. Then I had heard that Baker & McKenzie, which is another large national law firm was looking for someone to join the team that was going out to open the firm's office in Moscow. And so, in 1989, I left Gibson, Dunn and joined Baker McKenzie. It was interesting because my wife is from Argentina and we got married in December of '89 and literally two weeks later, moved to Moscow. Then in 1991, in April, I moved to Ukraine. Then we moved to Prague and I ran the Baker Office in Prague for six years and then we moved back to the States. Our daughter had never lived in the States. We wanted her to feel American. And I wanted to give back. I wanted to do government service.

Then I was fortunate enough to get a position in the Bush administration as a Vice President for Operations at the Millennium Challenge Corporation, which was a new agency that was just getting started. That was a phenomenal experience to be able to stand up a federal agency and sort of be in charge of an idea I was very passionate about. Particularly, the new way of delivering foreign systems, the trending private sector principles in the aid space. I was a political appointee, so Obama won in '08, he asked me to stay on for about six months during the transition in July of '09.

It's an interesting story that I keep this thing framed on the wall here. I was sort of figuring out what I want to do next. My father, who was very active Rotarian, was reading the Rotarian magazine and he saw an ad in the magazine that Rotary is looking for a new General Secretary, CEO. He tore it out of the magazine and wrote across there in half Ukrainian, half English; John, you may want to check this out. It seems like you have the qualifications. I say, "Two important lessons you learn from this experience is one, always listen to your dad. The second is great things happen when you read the Rotarian magazine."

We have 1.2 million Rotarians around the world and they're organized around 36,000 Rotary Clubs. Rotary was founded here in Chicago in 1905. Today, 70% of our Rotarians are outside the United States. We work officially in nine different languages, but we publish in 33 languages. So, it is a really, truly global, universal organization. We have two separate legal entities. We have the Rotary Foundation, which is our (c)(3), and that's the vehicle we use to raise money. Our foundation raises around $400 million a year. Then we have a (c)(4), which is Rotary International, which is the umbrella for our 36,000 clubs. Both entities are housed here in this building in Evanston. We own this building. We bought it back in ‘85.

We have these two legal entities, and each of these entities has its own board. There's two boards that I have to work with; the Rotary Foundation Board and the Rotary International board. Because we're a membership organization, every year the 36,000 club presidents are changing. These 36,000 clubs are organized in what we call districts, 535 districts around the world. So anywhere from 40 to 100 clubs per district. Each of these districts is run by what we call a governor. Those governors change every year. Then you have these two boards, Rotary International Board, the (c)(4), the board members have two-year terms. So, every year half the board is changing. Then the fact that the president of Rotary International is a volunteer Rotarian, the president changes every year. On the foundation side, those members have four-year terms. So, every year, a quarter of the trustees of the foundation are changing. Of course, the chair of the foundation changes every year.

We have a governance structure that's broad, spread out. You have 36,000 clubs that are autonomous, in a way, and you just can't dictate to them, “You must do this. You must do that.” To extent the change takes several years to implement, you're going to have, by year three, a completely different cast of people at the board level, and certainly, you'll have had three presidents

by then. The challenge in terms of anything that takes five, ten years to implement is by year ten, you've got nobody in year eight or nine even remembers what it was like earlier.

In countries like the United States, Canada, UK, Australia, New Zealand, where the middle class is now matured, we're seeing membership decline. We're seeing membership increases in emerging markets. We've been stable at about 1.2 million over the last 20 years, seeing membership declines in sort of developed markets, membership increases in emerging markets, and that's kind of balances itself off.

So that's just the context of it. How you effectively move something through that process? A lot of patience. As a practical governance matter, I need to identify Rotarian volunteer leaders within the structure. Bring them on board as ambassadors for the idea and then turn it into their idea and then have them drive it through the process.

But it's a massive complicated chess game to kind of frame things in a way that's appealing to a constituency that's really broad and really different across the board. There's no magic to it other than framing the issue and then politically and mechanically strategizing within this complicated framework as to what the best way to move this thing forward. You realize that it's really about getting to, yes. You can't be dogmatic. You can't be, it's my way or the highway. You really have to be a politician. Whether it's an idea coming from staff or whether it's an idea coming from volunteer leadership, the art of compromise is absolutely critical here.

Whenever you're trying to move through change, it's communicating openly, effectively and transparently in terms of what you're trying to achieve, why you're trying to achieve it, when it's going to happen and how does it impact you personally. Fear of the unknown. What's this going to mean for me? My job is lost. Does it mean that my job is now becoming less or more interesting for this rebranding? Does it mean we're now ditching our values and our traditions?

Because the values of Rotary are very deep in this organization. The values of ethics, the values of giving back, the values of fellowship. There's a concern, does this mean we're throwing all that out the window? We're abandoning this deep tradition. Rotarians, rightfully so, are extraordinarily proud of the tradition and accomplishments of the organization. So it's a communications exercise, it's trying to identify what the people's fears are going to be and to address those fears head on. So, you just got to be open. You got to explain it rationally and realize you're never going to get 100%. You can't. With an organization this complex.

For nonprofits to be successful, you need to incorporate private sector principles. I know historically, there's always been this we versus them concept. I know when I was at MCC, I always felt the private sector is not the enemy. They're like the solution. Firstly, they got all the money. Secondly, in the MCC context -- I'm going off a little bit -- but in the MCC context or the international development context, when you get a serious multinational, say, coming into a country with foreign direct investment, that's development.

And so private sector, I think, plays a huge role, in my view. Needs to play a huge role in making that happen. Our partnerships would have to play a huge role in making that happen. Look at polio; we couldn't go it alone, WHO couldn't do it alone. Gates joined the effort about ten years and have been a phenomenal additional partner. Partnership is absolutely critical. Any NGO, now I think, who really want to make big scalable impact, you've got to partner. You've got to partner.

It's all about also measurable results and metrics. First of all, donors are expecting that. It's a huge competition out there for funding. You go to a donor and say, "Give me…" "Why would I give it to you and not somebody else? Prove to me I'm going to get a return on my investment." I think most nonprofits now will need to be incorporating private sector principles into their

activities. Measuring their results, measuring their impact, measuring the M&E piece is going to be huge.

We're now fundamentally changed the way our foundation gives grants to our clubs. We now are looking for -- before, we kind of met a general philanthropic purpose, have fun. it's got to be sustainable. It's got to be measurable. It’s got to be able to tell us the impact. You have to have done a needs assessment with the community.

I think those are trends that all of us in the nonprofit space we're going to have to really move to partnership, closer collaboration with the private sector, and adopting private sector concepts and principles into how we operate. Because donors are asking quite frankly. It’s a huge competition. Those that demonstrate greater value for money are going to get the funding.

Lisa Sherman (Lisa.mp4)

My dad always said, the harder you work, the luckier you get. I've had a career before this for 30 plus years in media, marketing and advertising on all sides of that business. I ran brand management at the company we now know as Verizon. I was there for a number of years, many years. I was at an ad agency. I was on the agency side, mostly account management and business development. Then I was at a media company. I was at Viacom, where I was hired to launch one of their new cable networks.

I loved the field of communications generally, broadly, but I've always sort of been passionate and purpose-driven around just making the world a better place. And so, I found ways to do that in my career through projects I could work on within the companies I worked with, or outside. I was on a number of nonprofit boards and sort of scratched that itch in many different ways, but always was very involved. I like to say that my DNA was wired with this purpose-driven approach to life.

Then I got a call one day from a recruiter that asked if I wanted to have my name considered for the CEO of the Ad Council. Paula knows the story that I literally -- the minute he said that, I felt like lightning went through my body. It was like I don't just want to do this; I have to do this. This is the next thing that I have to do because it really would allow me to take all of my experience in the communications field and put it to use to make the world a better place as my day job, not just my side job. I knew I needed to have it, and I got it, and I've loved every day since.

I think my mandate coming in from the search committee and the board was to think about how to take the incredible legacy of this organization and ensure that it will continue to be both relevant and drive impact into the future. That was sort of the broad remit that I was given. And so, when I thought about how to do that, the first thing I really went about doing is just understanding what's here today. I went on a major listening tour, both internally; talking to lots of people here that are on the team, talking to board members, talking to our partners and our sponsors. I had a few preconceived notions, but I really didn't want to assume anything.

The good news is that I inherited an organization that was in such a strong fiscal shape that I didn't have a gun to my head. I didn't have to start in triage mode. So, I had the luxury of time. Not too much time because I'm not a patient person, but enough to really try and understand what's going on. So understood what was out there, how people thought we -- what we did well, what we could do better and then sort of formulate my own ideas about how to move forward.

We are in an industry that has gone through massive transformational changes and tons of disruption and it felt to me that we were still operating with a model that had been relatively unchanged. It wouldn't be fair to say it had been never changed. But I think it was relatively the

same as it had always been. We weren't leveraging, I don't think, the many tools that were now available to us by tapping into new digital and social platforms and influencers and new ways of creating content. We just needed to broaden our process. Because I think that while there is tons of disruption, I think it's been great for the Ad Council because we have more partners, more people that want to help us, more platforms to deliver messages to the right people at the right place at the right time and we needed to figure out how to harness that.

I also think that I am the kind of leader that -- I think when you're about to do something like we were about to do, you sort of have to create the case for change. Like why would I do this? What's the motivation to change? I felt like I worked hard to try and continually reinforce the case for why we had to do this and what was in it for people. Because I believe that if I couldn't get people to buy into the why, I was never going to be successful at bringing enough people along so that it became our transformation, just not my transformation. It could never be my transformation. That's just the way I approach everything.

I'm very big on people taking personal responsibility and accountability. I also knew, going in, having worked at a number of other organizations, that in order to drive change, which we definitely needed to drive, that you can't drive change without thinking about culture and how do we evolve the culture of the organization. You might want to do things differently, but if you don't evolve the culture that is supporting the way you're working, it's never going to be effective.

I think the very first thing we did was talk about coming up with a common set of values that we could all feel great about. Like what is the modus operandi of the Ad Council? What are the things we're going to stand for? How do we want to operate with each other? We did a whole set of things around values. We did a whole set of things around collaboration and teamwork,

which were part of those values. As you start to unpack the values, it created more opportunities to really start to sort of try them on and start to live them.

I think a brand's relevance is completely and directly connected to culture and cultural Zeitgeist. When you can connect those two, it becomes a place where people want to be. One, I feel very strongly about the importance of communications and letting people understand, This is the reason why. This is where I think we should be going, and constantly communicating about that so people feel like they understand where we are in the process, even if we don't know exactly where we're going. Being okay to say, “I'm not exactly sure. I directionally know this is correct, but we're going to figure it out together.”

So, a lot of communications. A lot of sort of painting a big picture of a vision to get people excited. A lot of listening, as I already talked about. As you know, we’ve gone through, like so many things have changed I can't even begin to -- like this office looks completely different. Everything a brand does has to communicate what the brand is. The minute there are in consistencies, no one believes the brand is for real. And so, if we're talking about being open and transparent, then your office has to be open and transparent.

We wanted to honor the legacy of the past, but make it feel fun and modern for today, and going forward so the branding around the office does that. Our Smokey hats there in lobby, that is such an homage to the iconic campaign. The longest ever running public service campaign in history. You see those hats and people come by, they take pictures in front of it and they push it all over social and put the hats on. It's done exactly what we wanted to do, which is honor the legacy, but make it feel modern and contemporary. It takes a long time. The thing with this journey is it's never done.

Jennifer Sirangelo (Jennifer.mp4)

I came here in 2006, and I became CEO in 2014. In that eight years, I was the chief development officer and the COO. Well, 58 million school-age children in America led me to positive youth development organizations. I have always been in the nonprofit sector. That was really what I wanted to do when I was in college. I was very inspired by being able to work in what I love doing as a volunteer. Early in my career, I tested the water and tried working in a number of organizations, but when I walked into the Boys and Girls Club on Thornberry Street and 43rd and Cleveland in Kansas City, Missouri, I saw youth development happening and I knew that's what I wanted to raise money for. Ever since then, since 1999, I've been doing that.

My predecessor CEO, when he hired me, he told me, “This will be unlike any other national organization you'll ever work for, but it will make you a much better leader.” It's not a top-down headquarters here. I am a part of a three-part leadership group that leads 4-H into the future that includes USDA and the Land-Grant Universities Cooperative Extension System. So I'm not the CEO of 4-H. I'm the CEO of the National 4-H Council, which is a partner to the 4-H movement here in the US.

I believe you have to have a vision of what you see the future could be for whatever you're leading. For me, it was both a division for a time for about eight years and then for the organization. The next thing you need is allies. The first thing I do is work with the allies, both, my board. At the time when I was leading the division, it was my colleagues on the executive team. Then with the important stakeholders in the field, the affiliate structure, whatever is -- the boots on the ground folks who are really going to make the change happen. When you work at the national level, as you know, we really don't serve the kids. We serve and help the people who serve the young people, at least, in our mission. Those allies are critical. So, ensuring that you're

not alone, a lone Ranger, but you start selling that vision in to having allies so it's a shared vision.

Then once that first step is over, the next one to me is really staying focused on that. It's very easy when you're a leader to have everyone brings you a great idea. After a vision that becomes shared, not just your own, I then focus on focus and maintaining that focus, which is not easy to do. Sometimes it means cutting other things out and making hard choices, which I've had to do, too. You really have to stay focused and know what your values are as a leader and for your organization.

I find that being CEO, I am more called on for that every day than almost anything else. Small decisions, large decisions, big change, management. So you have to set the values of the organization; how you value your customers, how you value your partners, how you value your employees, what you stand for, what you can let go. That's one of the traits, is kind of having a compass, I guess, I would say, that you use and then you have to be able to articulate that so your team can stay with you on it.

Then you have to be willing to take the risks because there will be risks. Making change, if it was easy, it would have already been done. If it wasn't controversial, somebody else would have already tried it. But at least for me, it's always required risk. Whether it’s financial, whether it's your own reputation, whether it's this better work or we're all jumping off the cliff together, which I've had that feeling before, too.

My first step of kind of having a vision, I had two or three listening sessions. Once with our board, another one with our leadership of the affiliates. And they were at different times in the evolution of what should this vision look like. It was our corporate board members that threw out big numbers like why aren't we growing? Why don't we have a growth goal? We had just

finished our 10-year longitudinal study and showing amazing impact on young people and our board was like, “But we're only serving six million of the 58 million kids that are school-age in America, we should be doing more. We are large. We have infrastructure. We need to be serving more kids.”

So, I have the allies and the board, but I thought, “What about the field, do they want to grow?” We convened most of our more visionary local leadership and we sat around the table and that was the question; do you want to grow?

The answer they gave us was yes. So we shocked and awed them with the census data about what is today's kindergarten class in the United States look like, what's its ethnic diversity, what are its primary language and we realized that three years post that conversation, they will be ready for 4-H and were we ready for them when we looked at the changing demographics in our country.

The answer was yes, we want to grow and to do that, we have to look different and act different into the future because our rural female Caucasian volunteers are not necessarily going to be the ones that are going to be able to relevantly serve over 50% of the young people in this kindergarten class that will be in 4-H in three years who are non-white. They may not be the right volunteers to recruit them, engage their parents with trust and things like that.

So, we had our marching orders. They said, “Can you help us with the playbook? For instance, in Oregon, 50% of the young people in Oregon 4-H, or 45, are Latino. How did they do it? What did that look like? What were the institutional supports? What were the things that happened? It was from there that it began to snowball, once we had peers involved. Today, that is a shared goal that we have a governance structure that has us share and lead together and goals.

About four years ago, we made a bold statement that we wanted to reach 10 million young people by 2025 that reflect the diversity of America. Today we serve six million. We know we have a responsibility and that's a shared goal. Today, you will hear USDA say that. You will hear all the local affiliates talk about that. We have the kind of demographic plan of what that has to look like. We have a lot of work to do, but we have a shared vision.

That's kind of how it worked. It was collaborative, is what I would say. At least for me, it's not like a single charismatic leader, a pied piper leading the way. My style is more to collaborate and to make it a shared vision, and it really works here in the 4-H structure. Especially, when you're the leader and the head, everyone wants to look to you for all the decisions and kind of default to you and I just don't let that happen. If that's what it is, it will rise and fall with me and that's not what I want.

If you watch me, I'm with people. I don't make the change, the people that work here, the people in our local level, make the change. I spend all my time during the day with people. I learned that from some great leaders, too. So, whether it's out walking around, or most of the time, it's more focused in targeted meetings that are advancing what we need to do together and where they can get my mind share and focus on a few things.

For me, meetings, that's a means to an end and that is to achieve the goals of the organization and to invest in the people around the organization that are making that happen. So you'll see me with people. I really focus on the executive team that I've hired, who is extraordinary, and ensuring they have what they need to be successful. I spend the majority of my time with them or their direct reports, ensuring that we're moving forward. That's what it looks like.

For us, it's been an organization that was kind of run as a family unit and I just run things a little more like a business. So yes, we will have a written strategic plan, and everyone will have a performance agreement and we will have ratings of your performances and things like that. Not everybody likes that. What comes out the other side is there are some of our associates that really have grown, and it's been awesome to see. The ones who've been here for a while but have been able to get promotions and stay and grow. Then it's been amazing to see the people who are attracted to that kind of environment and how that's changed the culture and the quality of the work we do.

So, it's been kind of interesting for me to learn how to manage through and lead a cohesive organization. One of the ways we've done that is by really making sure we take time to focus on our mission, not just our work. Every year, we stop, and we take a whole day, we pay everyone for the day. We have an in-service that we call Youth at Heart, where we keep youth at heart. We bring in young people from around the country that we've touched through our grant programs and some of our programs here on the campus, and we hear from them. We hear from the young people. They tell us what 4-H means to them. The impact it's had on their life with the programs that we've either funded or created. How they've changed their lives for the better. It's a highlight of the year for our staff. It really unifies all of our staff from the housekeepers to the executive team. It's a very unifying day. That's one of the things we've done to kind of really build that culture and keep everyone focused on the young people. But it's a challenge. There's no doubt it's a challenge.

We have a massive system. It has six million kids, 90,000 4-H clubs. Today, on average, 5,000 4-H clubs are meeting somewhere in the United States. Over 600,000 volunteers, 3,187 counties with a 4-H office. So, it's massive.

Number one, I maintain a cohesive executive team. We ensure we are on the same page so there's no confusion. That's true both with our board, ensuring that our board and our executive team are on the same page and there's not disagreement there, and with our executive team for staff and that there's no confusion there. Then that helps kind of cascade down to our affiliates.

An example of that would be staying really focused on our growth initiative. Our board really wanted that, made sure it was clear they really wanted to -- and we knew that we needed to increase our relevance in our marketing. We knew that the number one from our market research, from our field studies, our field feedback and listening, that the number one thing was we needed to be seen as more relevant for today's kids, parents and investors.

To do that, we had to tell our story in a new way. We knew that the fastest way to do that was to engage our alumni because they're the ones that understand and know and can see beyond maybe just what the local newspaper shows you the picture of the cow and the kid at the fair, but our alumni understand the youth development that's happening. That those are just activities. Any of those things we do, whether it's a robot or a photography or sewing or what your mom did, that's just activity. What we're really doing is positive youth development, and our alumni know that.

They've been amazing. That decision to use that kind of trajectory, so knowing that we wanted to serve more kids, that we would need more resources to do it, we'd have to be more relevant to do that, and our alumni being the fastest pathway to that relevance, both through their own stories, through their celebrity status, through their opening doors at our company, that's been the best decision that we've made. So, I would say that staying focused on that. Sometimes our board forgets. They're asking, "Why are we doing…?" and I'm like, "No, no, no, this is what

we're doing." Keeping everybody on the same page has been really important. So that alignment is really critical.

Then I would say intentional communication, then over-communicate and then over-communicate again. Another thing we've executed in the last few years has been a board reorganization, which is not easy to do. In fact, we should write a case study on it because it went so shockingly. It was pretty amazing.

We had a board of 35 that, at least, ten members of it were from our fields. They weren't really revenue-generating board members, they were more input. And we knew that when we had started our new strategic plan, we brought our board together and said, "How do you want to support this strategic plan?" They looked at it and they said, "There's one thing we need to do. We need to raise money. This plan is great and we can trust the program to our local affiliates, but they don't need our help with that. What they need is resources. How are we going to do that? We're going to have to have the right people on our team."

We had a retreat where I kind of thought there would be a step in a process, but we had a board retreat. They were on board. We had on the board four young people, we had eight or ten people from our local programs. They voluntarily raised their hands in that meeting and said, "We think it's time that we go off this board or we find another way to be engaged. We need this board to have the people of influence and means that can support 4-H." That was the catalyst, which I didn't expect to happen so quickly. But I think we'd built some trust and things like that.

Once we had that mandate, we were like really careful not to seize the day and look like we were pushing away the important stakeholders of our local affiliates and the youth. We spent a year. We had a year-long communication plan and then a six-month transition plan. I did a lot

of face time, not on the phone, literal face time, going to Timbuktu to be in the meetings to describe what was happening, the reason why, and to have opportunities for their feedback.

I got great feedback, which we built into a new governance model that we then took back out in the second half of the year. We tested that model with these parts of the governance model; will these address your concerns? The answer was yes. It was all kind of centered around how our alignment between National 4-H Council and our affiliates could stay relevant and authentic when it wasn't just driven by personality; how could we build in the policies and the practices to make that happen. So, we built that in. Then there was a vote and voluntarily, the folks walked off the board. Our board is now down to 21 and their giving has increased by, I think, it's 10x. Smaller board, ten times the resources.

I was really proud that a year and a half later, last week, I was at a meeting with our affiliates and one of them used that example of that process and the communication process as how really great that was and could we repeat that for some other things that we're working on? Could we do that again? That's one of the tools and techniques, is giving time for the change to resonate, for people to have input into it so it's not a top-down, but there's ownership. And then sharing the success with them when it works.

Stacey Stewart (Stacey.mp4)

I guess the way I would describe it is that I don't think that the traditional way that people might think that someone might move to this role is the route that I took. I started my career and really going to school focusing on studying finance and really working in banking. I was an economics major at Georgetown, and I went to business school and concentrated in finance. I had every intent on going to Wall Street, and I did. I ended up hearing about this area of Wall Street called public finance, which is essentially doing a lot of same things to raise capital for

companies, but doing it for state and local governments. When I found out about that, I thought, “That's perfect.” Raising money to build roads and bridges and do good. I had this real sense of that even though I was interested in finance and banking, that I wanted to be towards public good. That kind of theme is what is more consistent throughout my career.

I went to Wall Street. I worked at Merrill Lynch when it was still around. I got a headhunter call to go to Fannie Mae, which is a company that is a private company. It’s not so private anymore, but then it was a private company with a public mission. I spent a total of 17 years at Fannie Mae, about half the time in the company and then half the time as president and CEO of the foundation, the Fannie Mae Foundation.

After Fannie Mae, I got another headhunter call about coming to United Way. United Way is the largest nonprofit in the world. I went to United Way to lead all of our global impact efforts. The work that United Way does around education, financial stability and health, I led that work for United Way across 41 countries. Then I moved to be the US president, which within the US, United Way is still the largest nonprofit in the country. Slightly different structure, because there were, at the time, about 1,100 local United Ways. We set strategy and set direction at United Way Worldwide, so as the US president, I was kind of setting our strategy and direction for all of these local United Ways who are all individually governed at a local level. So, it's very much of a leadership by influence and force of nature kind of thing.

Then I got a headhunter call about coming here and I thought this was such a great opportunity to come to an organization that has done so much in the country. March of Dimes is the only, if very few, is the only organizations on the health front that have actually tackled a really big public health crisis and solved it. The fact that we have people whose lives have been saved, or we've eliminated an entire disease, not only from this country, but essentially from the

world, but for access to the vaccine, it would be virtually all eliminated around the world. But it is not an issue here in the US and that is a tremendous achievement. I thought it's such a great opportunity to lead an organization that has that kind of legacy. Now working on other important issues that I really care about in health, especially, around maternal and infant health.

March of Dimes is one 501(c)(3). So, every local office and market and staff person of March of Dimes, we're all under one umbrella. We're all one organization with hundreds of employees, but we're all one organization. That makes things, from my vantage point, a lot easier. It's still not easy to create change across a pretty broad national organization, but it's less complicated if you can sort of set strategy, get everybody on board, everybody then has responsibility to execute, and we can all come together as one team. Federated systems have a lot more power. At the local level, there's a lot more empowerment, which is really good. But it doesn't necessarily mean that there will be more alignment, which makes things challenging.

Especially, when you're trying to move and become more nimble and react to change in a changing environment, when you've got to go through a lot of extra hoops to get buy-in and to get people aligned around the same direction, it can be really hard. And you'll never get everyone. So, you're always trying to figure out what's that tipping point of how many people can I get, and still kind of move things forward. I loved that challenge. It wasn't something that I was frustrated with or upset about. It was just a different structure. You require a different kind of leadership skill.

I think what I found when I came to the organization, and it was pretty obvious from, one, looking at the financial statements and then, two, sort of observing the organization from the outside looking in, it was pretty clear the organization had kind of lost its ground in terms of people's public awareness, people's understanding of the organization, relevance in kind of the

world of philanthropy and nonprofit. I think a lot of people were unclear about the role of March of Dimes and even what we were doing, what our work is all about. People were quick to really remember if you said the March of Dimes, “Oh, yeah, the organization that worked on polio.” There were a lot of people who still knew that. Those people that would know that are people that are generally older, like my age and older. Then younger audiences don't even know what polio is, at some level. They don't even know polio was a problem. They don't remember that was an issue. They don't know that March of Dimes had anything to do with that. It's just a thing of the past for them. They read about it in history books. They learn about in school.

The reality was that we were not doing all that we needed to do to kind of maintain our financial house. We were sort of living in this mentality that we were still raising revenue at one level and that we can spend at one level, but the reality was certainly very different. So, we needed to really adjust that reality just in terms of financial management. But then what we also had to do was to really think about what are the steps that we're going to need to take to actually grow and build the organization. Not just in terms of revenue, which is really important, but also in terms of impact and relevance and really making a difference for moms and babies.

I think the other thing was that the organization really had found itself only analyzing problems by looking within itself. It actually wasn't looking at the external environment and the factors that were influencing how the organization got to where we had found ourselves. For example, we weren't looking at really taking in and responding to demographic trends and demographic changes in the country. We weren't thinking about technology and the use of technology and social media and smartphones, and how that is influencing how people want to be engaged and give. We weren't thinking about even how we were entering a world in which a

lot of young people do want to be very involved in changing their world and their environment, and how do we show up as a cause that people can really get their arms around?

It's just been a process. I think the one thing that I'm always challenging us to really remember is that we don't have to repair the whole thing overnight and do it the first time perfectly. What we have to do is get it to -- this has to be more of an iterative process of phases of improvement over time, as opposed to taking all the time in the world and trying to ensure perfection before we make even one decision.

The first 45 days was come in and let's put together a budget. It was pretty clear that we needed to cut, at least, $30 million out of our spending and I had about 30 to 45 days to do that. How do you do that with creating the minimal impact on people and also the minimal impact on things that were going to produce the most value for moms and babies? It was as much of a practice or sort of an exercise in looking at; what are the things that we're doing so inefficiently that if we just stopped doing these things and do them very differently pretty quickly, we can probably cut out a lot of just inefficiently spent resources and begin to get the organization more streamlined around still doing effective work, but doing it better? I can remember looking at things like all of the repetitive and duplicative processes.

So, the change we're leading here at March of Dimes is really remaking the organization. We did a lot of things at the top level to remake ourselves in terms of restructuring some of our financial situation, re-looking at our logo and our brand repositioning, our strategy. Then we also started looking at some of the inner workings of the organization like efficient operations and efficiency initiatives to help us run more efficiently. But the reality now is this organization was really started very differently than what we're trying to become. In many ways, what we're doing

now is really remaking the organization to be the organization that we really think we need to drive better outcomes for moms and babies.

Before we did the rebranding, we worked with EY and a guy named Simon Sinek. He was sort of gifted to us. He came in and kind of helped us a little bit on creating something called the Why Story. Why. W-H-Y. The idea was before we rebrand ourselves, let's understand who we are and why we matter. Why do we exist? Why should people care about us? Why do we care about us? What is it about what we're doing that matters? Reminding ourselves, even before we kind of settled on a vision statement and mission, we kind of said, "Why do we matter? Why does our work matter?"

That then helped frame for us everything that then followed. So, being able to really focus on what's the mission of the organization? We fight for the health of moms and babies. For us, when we redid our brand, it was really important to balance; how do we make sure that we still engage and embrace those supporters who've been with us for decades, as well as, bring in new audiences.

When we looked at our rebranding, we had to consider all these different things that the world has changed. We will soon be a majority-minority country. Most of the babies born today are babies of color. The March of Dimes may not have always been seen as being in relationship with many communities of color, but in order for us to be effective in our work, we have to be seen as a trusted organization in all those communities. We have to be able to maintain sort of a multigenerational approach to our work and look at all those audiences and have them all see us as an organization that is meaningful to them.

I don't think that a lot of the progress that we've made in two and a half years, and we still have a lot more to go, that I did it on my own. One of the most important decisions that I had to

make was picking a really great leadership team. Everyone on the executive leadership team here is new, as of the last year, year and a half. I think the most important trait is being able to identify the talent that we need for the direction that I felt like we wanted to go in so that I could have enough people around me to do the things that need to get done. I think that was the first thing.

The second is that I have the ability to talk about a future direction in ways that get people excited and make people believe that yeah, this is right. This is what we need to do. I don't know how I do that, or I don't even know if that's true. I just know that people tell me that. I think that being able to create a vision and set a direction, and being able to not only articulate a vision but also make people feel like they're a part of it and they get really excited about, I think is really super important. Because I think if it's just me and me on my own will trying to do all these things, it's never going to work. It's got to be pulling people into it so that people feel like this is a place they want to be a part of. Then they'll be excited about being part of a team and the direction of the organization.

I think also, it's absolutely about being willing to make a decision. I think a lot of times when organizations get sort of stuck or they're in a problem and it's hard to see their way out, sometimes people might know where they need to go, but they're not willing to make the decision. In other words, they look at making a decision of going in a certain direction that might be different from where they've been as a huge risk and a risk that they're not willing to take or they're too afraid of the repercussions or the ramifications of it, they're not sure it's going to work. So, they kind of spin in this indecision and indecisiveness.

Maybe because Franklin Roosevelt started the organization, we have a highly democratized way of decision-making here. Fifty people need to be in the room when we make a decision about something and 50 people's ideas are all equally valuable. I think the reality is that

that's not how organizations move forward. That's not how things get done. At the end of the day, somebody is accountable. Somebody's got to listen and observe and take in all the information of what they need to know to make an informed decision, but then somebody has got to make the call at some point. Sometimes that's me. Sometimes that's somebody else. But being clear on where those lines are and where those places are has been important. Being a leader that's willing to not only lead with vision, but also really focus on execution, like not just say, "Yeah, I have a big vision, let's now go execute it," has been really important in this role.

I think the other part of it is leading this kind of change really has meant that I have to constantly communicate, and not assume that anyone has heard what I said a month ago or two months ago. Even if I said it to people five times, it may be only the sixth time when they actually understand what I mean. Sometimes I'd say things over and over again to the point where I'm tired of hearing myself say it. Then I say it the sixth time, and people's eyes light up like, "Oh, I get what you're saying." I think that constant communication was a part of building the trust and people feeling like, "Well, I may not like it, but at least you're telling me what the deal is." That's pretty much all you can ask for. Just tell me the truth.

The decision to move here was about money, it was about how do we build a new culture, how do we attract new talent to the organization, how do we set a new chorus and communicate a new vision and a new direction for the organization. It was all wrapped up in one decision of moving our headquarters and selling that building. That has been a key part of our transformation, I think, at every level in the organization. Being in that office felt very much like we were tucked away from the world and we were nestled in this building that was sort of stuck in the past. What I also found was that it was almost inextricably tied to this culture that was very much stuck in the way things had always been.

I think a lot of people on the outside who see us as a nonprofit organization see it as an organization that functions very differently from any organization in the for-profit world. I think that's the biggest misunderstanding that a lot of people have of what it means to lead and manage a nonprofit organization is that the job that I have is exactly like a lot of jobs that other CEOs have. It’s just that I have a different tax status. That's all it means.

David Yarnold (David2.mp4)

It's kind of an unlikely path. I did 30 plus years in journalism and crossed over into the nonprofit environmental space and I've been in that space for 15 years. I went to the Environmental Defense Fund before I came to Audubon. When I was editor of the San Jose Mercury News, I had met a headhunter who encouraged me to think about running a nonprofit. She came back to me after I had five and a half years at Environmental Defense Fund and she said, "Have I got a job for you! It's a great brand, it's completely broken. You got about 50 percent chance of succeeding." I think the skillset that I acquired as a journalist, everything from communications to strategy to HR and being able to balance a budget and work on deadlines, I think, all of that prepared me for a CEO in the nonprofit sector.

I cannot understate how broken Audubon was. It had no central vision and so there was almost nothing that was shared by 23 state offices and 41 nature centers and 463 chapters. There was no glue. My job was to find the glue, the overarching story, that could animate this distributed network and help it live up to its potential.

As the Harvard Business School case outlines, the idea of finding the flyways was not just a vision that inspired people who know birds, but it served a really important organizational function, which is that it helped me both glue together all those parts, but it helped me break down the silos that had grown up around Audubon.

Our state offices and our centers are our employees. The chapters are independent 401(c)(3)s. The state offices, while they are our employees, did not seem to know that when I took over in 2010. They all acted that we had 23 volunteer state boards that all thought they ran Audubon.

All of my life, going back to high school, I attacked the status quo and I'm compulsively creative, which makes me really ill-suited for some organizations and well-suited for others. You can call it storytelling. It's about creating a vision that people can sign on to. And determination, perseverance. When I was an editor, I remember seeing a panel of three publishers, all of them are Pulitzer Prize winners. These were all guys that I just had huge respect for. And all of them were asked, "What would you have done differently in your first year as a publisher?" It was a rare thing for journalists to become publishers. Usually, it's the ad guys, the ad people, who become publishers. All three of these editors, who I just really look up to, said, "I would have been more decisive in my first year." I resolved right then that if I ever had that opportunity, that there were a lot of mistakes I can make in my first year, but not being decisive enough was not going to be one of them.

I also really believe in leading from the front. I think that people expect leaders to have visions -- not hallucinations, but visions -- and that they expect people to be able to articulate them. I would much rather -- and we did this at Audubon. We started from this hypothesis around the flyways, rather than starting with a whiteboard. I think that there's a time for a bottoms-up approach and to build consensus, and there's a time to lead from the front, and most of the time is the time to lead from the front.

For example, we have a standing policy that I don't get presented to with a PowerPoint. That PowerPoints get sent to me 36 hours in advance, and the assumption is that I will have

looked at them and then we'll go into a meeting and we'll look at the most important of those slides, and then get right down to the questions and decisions that need to be made. You'll see kind of a “no nonsense” approach. It's very much about getting to the point.

You'd see somebody who really doesn't care who has the best idea. This is my journalism background. At the end of the day, I only care about what gets done, I don't care who owns the idea. I don’t believe that I will have the best ideas, but I can guarantee you that I'll have an idea if nobody else does. Eighty percent of a CEO's job is just making decisions, and 80 percent of the decisions that you make really don't matter all that much.

Organizations can almost always change more dramatically and faster than they think they can. Audubon's proof of that. That's what the Audubon case ends up being about. I didn't know that when I started, but that's what it ends up being about. The corollary to that is that the cost of inaction is usually much greater than the cost of risk.

The problems that we had to solve when I started were like how do we just get an answer to what the finances look like? Now we're looking at three year rolling averages and fine-tuning those on an initiative by initiative basis. In the finance sphere, it's a totally different set of questions. The idea that change is done is wrong, 100 percent wrong.

Internal stakeholders range from volunteer state board members to staff. Staff was hungry to come back to a bird-focused mission. They knew that Audubon was wandering in the wilderness and they welcomed that. State volunteer leaders had mixed feelings at best and, in some cases, really liked the fact that it felt like they ran Audubon. They weren’t longing for somebody to walk into the executive office and say, "Hey, we've got a vision that's going to glue the whole thing together and point us all in the same direction and maximize our impact." They weren't sitting around waiting for that. As a result, when that started to happen, a number of them

said, "Hey, that's a really exciting vision. We'd love to be a part of that," and some of them said, "We kind of like it the way it is." But that's how change goes - early adopters and not so early adopters.

Externally, there were a lot of people who had written Audubon off as a major force for change. On the other hand, I had the exact same conversation with a program officer at the Packard Foundation and at the Hewlett Foundation one month apart. I actually have never asked them whether they got together on this, but I couldn't have been in my role more than six months, and each of them said to me -- and they both knew Audubon and they had granted money to Audubon over time and they knew about our grassroots network, and they said, "Look, if you can mobilize Audubon, you will have awakened the sleeping giant of conservation." There were plenty of stakeholders who were hungry for Audubon to bring a bi-partisan grassroots base to bare on some of the toughest environmental problems in America.

The proof of that is, what's happened over time with the MacArthur Foundation and the Walton Family Foundation. They're both funding us now in the double digits millions of dollars, because they see our ability to get stuff done.

I'm going to come back to that point about leading from the front. Start with a hypothesis; be leaderly. Start with your point of view about what needs to be done and then be really flexible about -- take responsibility for your vision, drive change, insist on urgency, set tight deadlines and make decisions and move on.

For most organizations, communications is an underfunded afterthought. Because most people who run nonprofits come from the program side and communications is an underfunded afterthought. Audubon is an example of the opposite of that, where we led with communications

and we established ourselves through communications initiatives and state of the art -- if you look at our website, you can see the difference.

We did a publication a few months ago, where we did a midway report on our strategic plan. It's called Midflight and the cover illustration is a bunch of birds on an airplane. It's funny and people loved it. You get attention all the time. You can get attention all the time and mind share all the time, if you communicate well. Most NGOs don't understand that their communications competition is world class. We're competing for mind share against every cool website there is. Most organizations produce boring, institutional, jargon-laden stuff that makes them all feel great but isn't really designed to maximize impact.

At the end of the day, people fund results. What most nonprofits don't do is they don't recognize that telling the story of those results is key to being measured properly. It's a little bit of a false distinction to think that there's the work in the field and then there's communications. If you're not communicating about the work in the field, the work in the field is of less value.

I'm going to come back to that point about leading from the front. Start with a hypothesis; be leaderly. Start with your point of view about what needs to be done and then be really flexible about -- take responsibility for your vision, drive change, insist on urgency, set tight deadlines and make decisions and move on.