

*BE FEARLESS*  
**FRAMEWORK  
FOR ACTION**

Driving impact  
and inspiring change.  
A guide for **bold** leaders.

**FEAR**  
*BE FEARLESS*

powered by: **THE CASE FOUNDATION**



# BE BOLD. TAKE RISKS. BE BRAVE. TAKE ACTION.

We believe organizations that make a real difference are guided from within by strong leaders who are passionate about their cause, take risks and build teams of changemakers. That's what it means to *BE FEARLESS*.


We developed this Framework for Action to help you do that. Read on to learn how to assess your organization, identify opportunities for increasing your impact and take the bold steps necessary to advance your mission.

You've already taken the first step on your *BE FEARLESS* journey by downloading the Framework for Action! After you've completed this series of challenges, you will have developed a clearer understanding of what it takes to create transformative change within your organization.




## THOUGHT BREAK

I want my organization to *BE FEARLESS* because...

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The challenges we face are...

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# FIVE BE FEARLESS PRINCIPLES

A bold approach to social change.

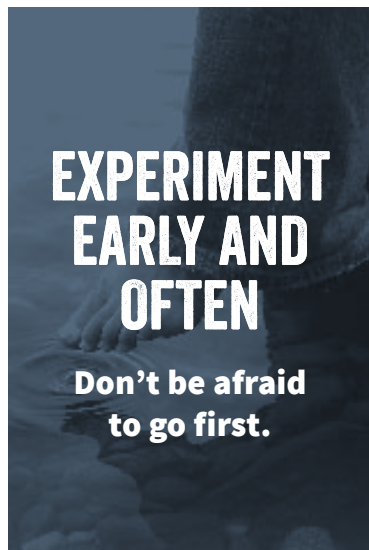
We've seen inspiring social change made by organizations of all sizes and types across many industries—and a few things remain consistent. Here are five key insights shared by teams from all over the world that have made a powerful impact:

## THOUGHT BREAK

Which principle inspires you the most and why?



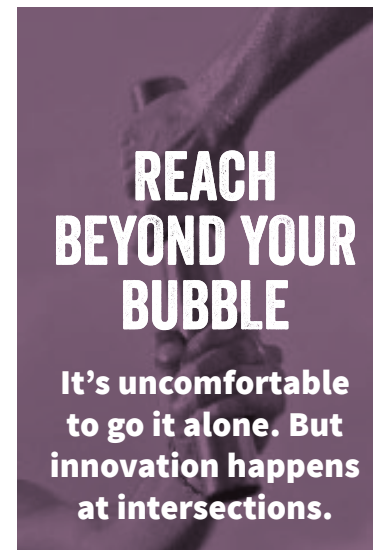
**MAKE BIG BETS AND MAKE HISTORY**  
Set audacious, not incremental, goals.



**EXPERIMENT EARLY AND OFTEN**  
Don't be afraid to go first.



**MAKE FAILURE MATTER**  
Failure teaches. Learn from it.



**REACH BEYOND YOUR BUBBLE**  
It's uncomfortable to go it alone. But innovation happens at intersections.



**LET URGENCY CONQUER FEAR**  
Don't overthink and overanalyze. Do.

**Tip** • **The Five Principles:** The five *BE FEARLESS* principles guide our philosophy on leadership for change. Learn more about each one at [casefoundation.org/befearless](https://casefoundation.org/befearless) >>

## A bold, fearless attitude is key to social change.

But actually implementing change takes skill and resources—and not every organization, fearless though it may be, is ready to make large-scale change. Read on to see where your organization falls in the structural phases of fearlessness.

# THREE STAGES ON THE PATH TO FEARLESSNESS

## How to implement the *BE FEARLESS* principles.

An organization's journey to fearlessness is not always a straight path. It takes time for changemaking teams to internalize the five *BE FEARLESS* principles, understand how they relate to a mission statement, implement them on multiple levels and communicate them as a fundamental value to external stakeholders.

As you read the stages below, think about how they apply to your organization's treatment of one (or any) of the *BE FEARLESS* principles. There is no standard timeline for moving through the stages, and your organization may be at a different stage for each principle.

**Tip • Why Are These Stages Important?** Understanding the three stages will help to guide you throughout the Framework for Action. You will be navigating through these stages during the assessment.

### STAGE 1 AWARENESS

**Get familiar with the five *BE FEARLESS* principles.**  
The five key principles may be new to your organization, or you may not yet have committed to taking action on it. If your organization is in the process of gathering information or knowledge, or simply asking important questions about the fundamental concepts, this is your starting point.

### STAGE 2 ACTION

**Consider how your mission statement is affected.**  
At this stage, an organization has moved beyond awareness and is taking steps to implement one or several principles at the same time. If your organization has internalized a fundamental concept of *BE FEARLESS*, understands its context within your mission statement and is ready to put it into action, this is where you should start.

### STAGE 3 FEARLESSNESS

**Institutionalize actions, incorporate the principles into day-to-day culture.** In the final stage, a principle is incorporated into multiple aspects of an organization's culture and operations. If your organization has taken isolated actions to implement one or more of the five *BE FEARLESS* principles at various levels and now wants to communicate that value with external stakeholders, this is the place for you to begin.


# ELEMENTS OF FEARLESSNESS

## Does your organization have an effective strategic plan?

It's crucial for changemaking organizations to have smart business plans that implement effective operational strategies. We have identified seven core organizational processes that represent elements any dynamic organization should consider.

### THOUGHT BREAK

While you're reading through this page, think about how these processes manifest in your organization today.



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### CULTURE

Building commitment among the team and developing a common set of values, norms and behaviors that guide day-to-day work.



### STRATEGY

Establishing and implementing on a shared vision and overall direction for the organization and/or a programmatic area.

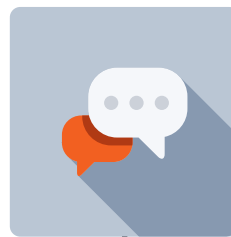
### PLANNING

Identifying how long-term strategy will be executed.



### COMMUNICATION

Informing key stakeholders (internal and external to the organization) about the importance of applying the principles.



### MEASUREMENT

Establishing metrics and creating systems for measuring activities related to the principles.



### EVALUATION

Establishing systems for measuring progress and incorporating feedback.



### FUNDING

Aligning financial systems, grant processes and annual budgeting to enable the implementation of the principles.



# PROGRESS GUIDE

## Putting the pieces together.




Now that you understand the foundational **BE FEARLESS** principles, the three stages of implementation and the operational elements of constructing an effective business plan, it's time to put it all together. The chart on the next page will help you assess how well your organization applies the principles to each organizational element.

*Remember, this is meant as a tool for you to think about your organization's progress. There are no right answers!*

**First, read through each stage.**  
 For each operational element, we've described an example of what an organization looks like at each stage of implementing the elements of fearlessness. Read through each stage and think about how your organization approaches each process.

**Tips • Where Are You on the Path to Fearlessness?** If you're new to the **BE FEARLESS** principles, or just want to see how they work in the real world, **click here** to check out our case studies.

**Print it Out.** This exercise works really well workbook-style, so hang it on a wall or somewhere you will look at it often. Revisit your assessment at various points throughout the year to help you aim for creating the change you want. **Click here** for a printer-friendly version (*legal paper recommended*).

ELEMENTS OF FEARLESSNESS	STAGE 1 AWARENESS	STAGE 2 ACTION	STAGE 3 FEARLESSNESS
<b>CULTURE</b> 	<p><b>Ex:</b> You host regular internal discussions to brainstorm new ideas and identify opportunities for action.</p> <p>Is this your stage? If so, write down how your organization will integrate this concept.</p>	<p><b>Ex:</b> You select board members that represent multiple sectors and organizations with various expertise and perspectives.</p> <p>Is this your stage? If so, write down how your organization will integrate this concept.</p>	<p><b>Ex:</b> You prioritize and act on strong hypotheses and data rather than waiting for "perfect" information; your board challenges you to make investments that follow these values.</p> <p>Is this your stage? If so, write down how your organization will integrate this concept.</p>
<b>ASSESSMENT &gt;&gt;</b>	 		

### Then, get out a pencil.

Mark where you think your organization falls on the spectrum and jot down a few examples that come to mind. If you think your organization has fully implemented Stage 1 but only partially implemented Stage 2, place a mark somewhere toward the beginning of Stage 2.





# PATH TO FEARLESSNESS

## Assess your organization

In the progress row, mark how far your organization has gone to implement the *BE FEARLESS* principles. Then note what your organization looked like in previous phases, how it can get to the next stage or how its major goals fit into future phases.




**Tip • Where Should You Start?**  
Once you've identified where your organization falls on the spectrum, prioritize actions you would like to focus on first, second and third as you evolve.

ELEMENTS OF FEARLESSNESS	STAGE 1 AWARENESS	STAGE 2 ACTION	STAGE 3 FEARLESSNESS
<p><b>CULTURE</b></p> 	<p><b>Ex:</b> You host regular internal discussions to brainstorm new ideas and identify opportunities for action.</p> <hr/> <hr/> <hr/> <hr/>	<p><b>Ex:</b> You select board members that represent multiple sectors and organizations with various expertise and perspectives.</p> <hr/> <hr/> <hr/> <hr/>	<p><b>Ex:</b> You prioritize and act on strong hypotheses and data rather than waiting for “perfect” information; your board challenges you to make investments that follow these values.</p> <hr/> <hr/> <hr/> <hr/>
<p>PROGRESS &gt;&gt;</p>			
<p><b>STRATEGY</b></p> 	<p><b>Ex:</b> You establish a monthly or quarterly review period to consider unsolicited or off-calendar grant applications.</p> <hr/> <hr/> <hr/> <hr/>	<p><b>Ex:</b> You break big and complex social problems down into a series of manageable “wins” each with its own unique urgency, but leading to achieving larger change.</p> <hr/> <hr/> <hr/> <hr/>	<p><b>Ex:</b> You establish a cross-sector “steering” or advisory board to advise on program/portfolio strategy.</p> <hr/> <hr/> <hr/> <hr/>
<p>PROGRESS &gt;&gt;</p>			

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# PATH TO FEARLESSNESS



	STAGE 1 AWARENESS	STAGE 2 ACTION	STAGE 3 FEARLESSNESS
<b>PLANNING</b> 	<b>Ex:</b> You set a monthly or quarterly meeting to discuss the emerging issues in your field and the strategies that could be used to address them. You intentionally talk with multiple organizations across sectors about the problem you are trying to solve. _____ _____	<b>Ex:</b> You create processes for approving and evaluating experimental initiatives and leadership holds staff accountable for exploring new opportunities, maybe through a performance review system. _____ _____ _____	<b>Ex:</b> You allow for less evidence-based grant-making by investing in solid, logical plans from leaders with strong track records of success (rather than scientific/proven evidence of positive outcomes). _____ _____ _____
<b>PROGRESS &gt;&gt;</b>			
<b>COMMUNICATION</b> 	<b>Ex:</b> You regularly communicate with internal and external stakeholders about your commitment to making dramatic change and willingness and ability to take risks. _____ _____ _____	<b>Ex:</b> You have publicly recognized organizational failures, in addition to successes, and hold yourself accountable to learning for the sake of progress. _____ _____ _____	<b>Ex:</b> You regularly and publicly recognize organizational failures or missteps as learning experiences. _____ _____ _____
<b>PROGRESS &gt;&gt;</b>			
<b>MEASUREMENT</b> 	<b>Ex:</b> You identify what your desired outputs and impacts are before a program or project begins and attempt to track them. _____ _____ _____	<b>Ex:</b> You routinely launch pilot or “proof of concept” initiatives as part of your strategy and identify early-stage milestones against which you measure progress. _____ _____ _____	<b>Ex:</b> You define how the organization will hold itself publicly accountable to making progress towards its goal. _____ _____ _____
<b>PROGRESS &gt;&gt;</b>			

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# PATH TO FEARLESSNESS

	STAGE 1 AWARENESS	STAGE 2 ACTION	STAGE 3 FEARLESSNESS
<b>EVALUATION</b> 	<b>Ex:</b> You routinely ask your grantees and partners questions like, “What does success/failure look like?” “What have we learned from things that didn’t go as planned?” and “Looking forward, how should we adapt based on what we now know?” _____ _____ _____	<b>Ex:</b> You create an internal system that evaluates how you are tracking against success metrics in order to better understand what is and isn’t working. _____ _____ _____	<b>Ex:</b> You collaborate with cross-sector partners to develop shared goals and performance measures to hold the broader community and multiple stakeholders accountable for long-term change. _____ _____ _____
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<b>FUNDING</b> 	<b>Ex:</b> You occasionally fund high-risk initiatives, though often within program or portfolio boundaries. _____ _____ _____	<b>Ex:</b> You establish a “just in case” fund to enable the organization to dedicate resources to urgent issues as they arise; you build flexibility into funding guidelines that make it possible to invest in the unforeseen. _____ _____ _____	<b>Ex:</b> You develop a pooled grant fund with other foundations, government agencies, and/or private sector companies; multiple partners collectively evaluate grant applications. _____ _____ _____
<b>PROGRESS &gt;&gt;</b>			

**Additional Notes:** \_\_\_\_\_  
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# NOW WHAT?

It's time to analyze your program assessment and bring in the rest of your team. Changemaking organizations rely on leadership from within to drive impact—so share the **BE FEARLESS** principles with your team, talk with them about the areas you've identified where you think your organization can improve and develop a plan for action.

## Analyze Your Progress

Take a closer look at where you placed your marks. Are most of them within a particular stage? Or do you have marks in all three stages? Think about if you should focus on pushing your organization into the next stage, or if you can make small improvements in one of the seven categories.

## Talk to Your Team

To truly implement the five **BE FEARLESS** principles, you'll need help. Take your progress assessment to your team and talk to them about how you can push your organization forward—together.

## Develop an Action Plan

With your team, decide what steps you need to take to evolve your organization. Prioritize areas of focus and write an action plan. Then present it to your leadership team.

**You're ready to take action. Go on—BE FEARLESS.**

## THOUGHT BREAK

Before you put this down, write down your **BE FEARLESS** goals:



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Now, take a moment to think about what your next step is. For example, will you:

*Set up a meeting with your team to get buy-in on the **BE FEARLESS** principles?*

*Host a meeting with peers to share learnings and specifically failures?*

*Engage with your board?*

Write down the next 2-3 things you need to do, people you should speak with and stakeholders you may need to engage:



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“There are risks and costs to action. But they are far less than the long range risks of comfortable inaction.”

— John F. Kennedy

Share your *BE FEARLESS* stories, pictures and videos with us!  
[BE FEARLESS @CaseFoundation.org](mailto:BE FEARLESS @CaseFoundation.org)



[CaseFoundation.org/BeFearless](https://CaseFoundation.org/BeFearless)  
**#BE FEARLESS**






# PATH TO FEARLESSNESS

## Tip • Where Should You Start?

Once you've identified where your organization falls on the spectrum, prioritize actions you would like to focus on first, second and third as you evolve.

## Assess the progress of your organization

In the progress row, mark how far your organization has gone to implement the **BE FEARLESS** principles. Then note what your organization looked like in previous phases, how it can get to the next stage, or how its major goals fit into future phases.





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**Additional Notes:** \_\_\_\_\_  
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