



Resilience at Work

*How Nonprofits Adapt to Disruption.
How Funders Can Help.*

DIANA SCEARCE WITH JUNE WANG

April 2020

Funded by:

 **S. D. BECHTEL, JR.
FOUNDATION**
STEPHEN BECHTEL FUND

Resilience: A path toward durable outcomes

The decision to spend down all the assets of the S. D. Bechtel, Jr. Foundation was made in 2008, creating significant opportunities as well as some real challenges. The practical effect of putting the entire endowment to work (along with substantial new gifts from Mr. Bechtel annually) was a climb in the size of Foundation grants and number of grantees. I joined the Foundation in early 2013 as the director of organizational effectiveness. Over the course of the following year, programs were consolidated and several large strategic initiatives became the focus for the Foundation and its growing professional staff.

The Foundation's emphasis on a set of audacious goals in Education and Environment programming in turn led to deep partnerships with trusted grantees. Knowing that the Foundation would sunset in 2020, program teams frequently thought about and discussed the impact of our departure on these nonprofits. The Foundation's commitment to durable outcomes meant that we needed to think beyond short-term gains that wouldn't, or couldn't, be sustained. We hoped to leave behind capable individuals, anchor organizations, and fields that out-live the Foundation and continue their work on goals we share.

Knowing the Foundation can't control for all the variables in an increasingly volatile external context, our approach was to consider the capacities as well as the health of organizations and networks in all our initiatives. It was obvious that large, multi-year grants posed negative consequences for grantees if these funds resulted in unhealthy dependency on the Foundation. In this context, we became students of organizational resiliency. Our aim was to learn from a wide array of nonprofits that have experienced a range of setbacks, including funding losses, and to spark a broader dialogue among grantmakers about how funders can help cultivate resiliency in their grantees.

We combed the literature, interviewed grantees and other nonprofits, and built a toolkit in 2015 that included a guide to help grantees and funders engage in constructive dialogue, together exploring resilience and ways to enhance it. We saw that these resiliency resources were valued, and in 2018 the Foundation decided to take a next step by learning from the experiences and attributes of organizations that have dealt with severe shocks and disruptions. That year, we engaged philanthropy consultant Diana Searce to initiate a study that has yielded this report. The Foundation is grateful to Diana and her colleague June Wang for their inventive and thoughtful work, and to the remarkable steering group of sector leaders who participated at every stage of the project.

This study publishes in the spring of 2020 – a time when the COVID-19 pandemic rages, causing untold human suffering and threatening the viability of nonprofits whose work is vital to society today and tomorrow. Resilience is a watchword of the day, and we hope that the insights captured in this report can help point the way for nonprofits and funders working tirelessly to respond and adapt to the new realities caused by the pandemic. In the coming months, we are certain there will be much more to learn about what it takes to respond and adapt to a global disruption of this magnitude.

This report in no way replaces the excellent research and high-quality tools already available on the topic of nonprofit capacity. It does seek to shine a light on a subset of resilience-fueling capabilities that deserve special attention. This research and the companion [Resiliency Guide](#) highlight aspects of organizational health that can be hard to define or are easily overlooked, such as frames of mind, organizational culture, and network connections.

We hope that you find this work both provocative and useful, and that you will contribute to the timely, growing dialogue in the field for the betterment of our collective efforts.



BARBARA KIBBE

Director, Effectiveness
S. D. Bechtel, Jr. Foundation
April 2020

Table of Contents

Executive Summary 5

PART ONE

Resilience: What it is and why it matters 7

A time for resilience

Sidebar. Disruptions are not necessarily a bad thing

Chart. The nature of nonprofit disruption

Chart. Disruptions: A closer look

PART TWO

Seven characteristics of resilient organizations 12

1. Purpose driven: A galvanizing commitment to mission, meaning, and values

Sidebar. Resilience and flexible financial capital

2. Clear eyed: Challenges faced head on while maintaining faith in ultimate success

Sidebar. Inventive: Crafting solutions with available resources

3. Future oriented: Forward-looking planning practices for navigating an uncertain future

4. Open: Intentional communication with internal and external stakeholders

5. Empowered: Inclusive organizational culture that embraces shared leadership

6. Committed to self-renewal: Space created for rest and rejuvenation

7. Connected: Supported by personal relationships, institutional links, and community networks

PART THREE

How funders can contribute to nonprofit resilience 29

Principles

Practice

Sidebar. For funders getting started

Disruption: A time for learning and adaptation 36

PART FOUR

Stories of nonprofit resilience in action 37

Consumer Reports: Reinvention for the digital age

Dimensions Dance Theater: Unwavering commitment to mission during changing times

HOPE Services Hawai'i, Inc.: Activating connections in times of need

National Immigration Law Center: Making a difference today while planning for a better tomorrow

NatureBridge: Building resilience for the long term

Partnership for Public Service: Keeping people and culture at the center in turbulent times

United Philanthropy Forum: Transformation fueled by disruption

Appendices 61

Resources for going deeper

Research methodology

Nonprofits interviewed and the nature of their disruptions

Acknowledgments

Endnotes

Executive Summary

Today and in the future, there is one thing social change leaders can be sure of: they will experience disruption, uncertainty, and significant change. Whether recovering from a hurricane, navigating global health concerns, responding to shifts in public policy, or regrouping after the departure of a top leader, nonprofits that get intentional about cultivating organizational resilience are better at anticipating and adapting to disruption.

Resilience is critical for surviving these turbulent times. Nonprofit organizational resilience is the ability to respond effectively to change and adapt successfully to new and unforeseen circumstances while staying true to mission. At their best, resilient nonprofits respond to disruptions as tipping points, rather than tragedies, finding new opportunities to learn, grow, evolve, and, ultimately, better serve their communities.

So, what does it take for nonprofits to survive and even thrive amid shocks and disruptions? Through our research, seven characteristics stood out as critical to resilient nonprofits:



1. **Purpose driven:** A galvanizing commitment to mission, meaning, and values



2. **Clear eyed:** Challenges faced head-on while maintaining faith in ultimate success



3. **Future oriented:** Forward-looking planning practices for navigating an uncertain future



4. **Open:** Intentional communication with internal and external stakeholders



5. **Empowered:** Inclusive organizational culture that embraces shared leadership



6. **Committed to self-renewal:** Space created for rest and rejuvenation



7. **Connected:** Supported by personal relationships, institutional links, and community networks

There is no one recipe for resilience. Context matters – a lot. And, adapting to disruption and uncertainty will never be a linear journey. Nonprofits can expect periods of growth, setback, adaptation, and, yet again, disruption. Resilience is a way of being, not an endpoint. This is a reality many nonprofits know well. However, it's less readily acknowledged by funders and, even less, a topic for open discussion among funders and their grantees.

Funders can help by normalizing the experience of nonprofit disruption. Through authentic, open, and lasting relationships, funders in partnership with nonprofits can craft supports that meet the specific needs of the moment and the emerging future. The following principles can help pave the way for funders who want to enhance nonprofit resilience:

- **Come to the table.** Be a student of nonprofits and their context, so when disruption strikes you can offer meaningful support.
- **Stay at the table.** Listen intently, remain committed, and give nonprofits the space to craft a response to disruption. Inquire and offer support, while also recognizing that remaining committed may mean sitting back when a nonprofit is navigating turbulence.
- **Stand in the nonprofit's shoes.** Commit to building awareness of your biases and blind spots. Recognize the many ways the systems, codes, and cultures of philanthropy can perpetuate inequities and use that awareness to confront the power imbalances inherent in many funder relationships.
- **Be in open dialogue with nonprofits.** Invite candid and authentic conversation. Learn together with grantees about current and potential disruptions and how you can help nonprofits to prepare and respond.
- **Keep nonprofits' needs at the center.** Sometimes your own funder-driven initiatives will be relevant to the needs of nonprofits experiencing turmoil. Sometimes they won't. Keep the unique context and needs of individual nonprofits front of mind, recognizing that no one size will fit all.

In many ways, these are simply reminders of “good grantmaking” principles, which can be easy to lose sight of when disruption strikes. Hand in hand, nonprofits, with funders at their side, can navigate turbulence, learn, and adapt to new realities.

Resilience: What it is and why it matters

Several years ago, the National Immigration Law Center (NILC) established a practice of rehearsing future scenarios in order to better prepare itself for times of disruption. So, when an intense new wave of assaults on immigrant rights kicked off in 2017, NILC was ready to respond with force. The organization took immediate action to challenge the Muslim ban, defend the Deferred Action for Childhood Arrivals (DACA) program and its recipients, and ramp up its campaign to help immigrants know their rights and prepare for immigration raids. The nonprofit's ability to quickly respond also attracted new donors. From 2016 to 2018, NILC grew its base from 700 individual donors to more than 21,000.

When the Kilauea volcano on Hawai'i erupted in 2018, sending lava flowing through streets and neighborhoods and displacing thousands of people, the island community rushed to respond to the emergency needs of local residents. Within four days of the eruption, HOPE Services had teamed up with county officials, civil defense, the Hawai'i Community Foundation, and other local nonprofits to set up a resource center, make sense of emerging needs, and quickly move attention and funds where they were needed. One urgent need was temporary housing. With FEMA resources not immediately available, HOPE Services Hawai'i sprang into action, marshaling the resources to quickly construct micro housing units.

Over nearly a century, Consumer Reports (CR) had built a powerful brand around product safety and trusted product ratings via its signature print magazine. But by 2014, it was clear that the social enterprise and advocacy organization's traditional focus needed a reboot. The digital disruption was upending its operating model – and 21st-century consumers had new needs. With support from funders aligned with its new vision, CR radically shifted its focus toward helping consumers navigate the digital marketplace, all while transforming itself into an agile digitally savvy organization.

These organizations are just three examples of nonprofits that are meeting disruption head on and gaining strength in the process. These nonprofits are adapting to new and unforeseen circumstances and seizing opportunity for greater relevance in moments of change, all while staying true to their mission. They are demonstrating organizational resilience.

Resilience is a term with broad application. Fields as varied as engineering, ecology, and psychology use it to describe the ability of an individual, object, or system to withstand or spring back from some form of challenge. But resilience is not just about enduring turbulence and bouncing back to the original state. Nonprofit organizational resilience is the ability to *respond* effectively to change and *adapt* successfully to new and unforeseen circumstances *while staying true to mission*. At their best, resilient nonprofits respond to disruptions as tipping points, rather than tragedies, finding new opportunities to learn, grow, evolve, and, ultimately, better serve their communities.

Nonprofit organizational resilience is the ability to *respond* effectively to change and *adapt* successfully to new and unforeseen circumstances *while staying true to mission*.

A TIME FOR RESILIENCE

Disruption is the new normal – for nonprofits, for philanthropies, and, most acutely, for the communities they serve.¹ Over the last several years, the drumbeat of shocks and surprises has both quickened and intensified. The list of sudden and highly volatile disruptions can feel endless. To name a few: in 2019 the U.S. experienced 14 major weather and climate disasters – floods, storms, cyclones, and fires – with losses exceeding \$1 billion each time.² Hate crimes in the U.S. hit a 16-year high in 2018.³ Hacking, the ultimate digital disruption, is also on the rise. In 2019 hackers successfully attacked the City of Baltimore, 23 local government entities in Texas, and hospitals across the state of Arkansas.⁴ As we are finishing this report in early spring 2020, communities around the globe are reeling from the rapid spread of the COVID-19 pandemic and struggling to respond to a monumental disruption of uncertain duration.

Slower moving yet seismic shifts are also unfolding, creating both turbulence and new possibility. Consider, for example, generational shifts underway. Millennials, the first digitally native generation, are about to outnumber Baby Boomers in the U.S. Nearly half the members of the generation behind them, Generation Z, are people of color – and they are entering adulthood intent on sparking social change and shifting workplace dynamics.⁵ At the same time, racial and gender inequities have been increasingly prominent in the headlines. Black Lives Matter is highlighting the precarious position of black people in American society today while the #MeToo movement has moved sexual harassment into the spotlight.

Meanwhile, the social sector itself is being disrupted. For instance, philanthropy is under pressure to grapple with systemic racism, with the heightened attention to longstanding symptoms of inequity in grantmaking and increasing numbers of funders focused on bringing racial justice to the forefront of their work.⁶ And while donations to the nation's largest nonprofits rose considerably in 2018, uncertainty surrounding the upcoming 2020 election has these same nonprofits worried about political volatility impacting their fundraising efforts. As shocks and crises become bigger and more frequent, fundraisers see potential donor fatigue on the horizon.⁷

These ever-shifting dynamics have many nonprofits wondering about their optimal strategy going forward. They find themselves grappling with how best to operate in an increasingly turbulent environment – and what to do about funder-driven capacity building models and grantmaking practices that are ill-suited to such a volatile, complex, and uncertain world. Unsurprisingly, many nonprofits are head down and focused on simply weathering these storms – and sometimes, this is all that’s possible and perhaps needed. But for others, disruptions are the impetus for changing in significant ways and *adapting* to the new reality. Marta Tellado, the CEO of Consumer Reports, embraced disruption when she said, “Our mission is not going to change, but we have to show up differently. This is not about a new tagline. It’s about an existential threat. We have to be fearless about it and try some new things.” So how are nonprofits responding to shocks and disruptions? How can nonprofits, alongside their funders, adapt to new realities and prepare for the next tsunami of change?

“Our mission is not going to change, but we have to show up differently. This is not about a new tagline. It’s about an existential threat. We have to be fearless about it and try some new things.”

MARTA TELLADO
Consumer Reports

Our study aimed to find out. From 2018 to late 2019, we spoke with nearly 90 leaders of U.S.-based nonprofits and funders about their experiences navigating a wide range of disruptions.⁸ The leaders we talked to were steering their organizations through major disturbances to their status quo – whether it was the internal churn that comes with common and often slow-moving changes, like shifts in funding and leadership transitions, or sudden shocks and crises driven by external forces like natural disasters and cyber attacks. (See chart: “The nature of nonprofit disruption.”)

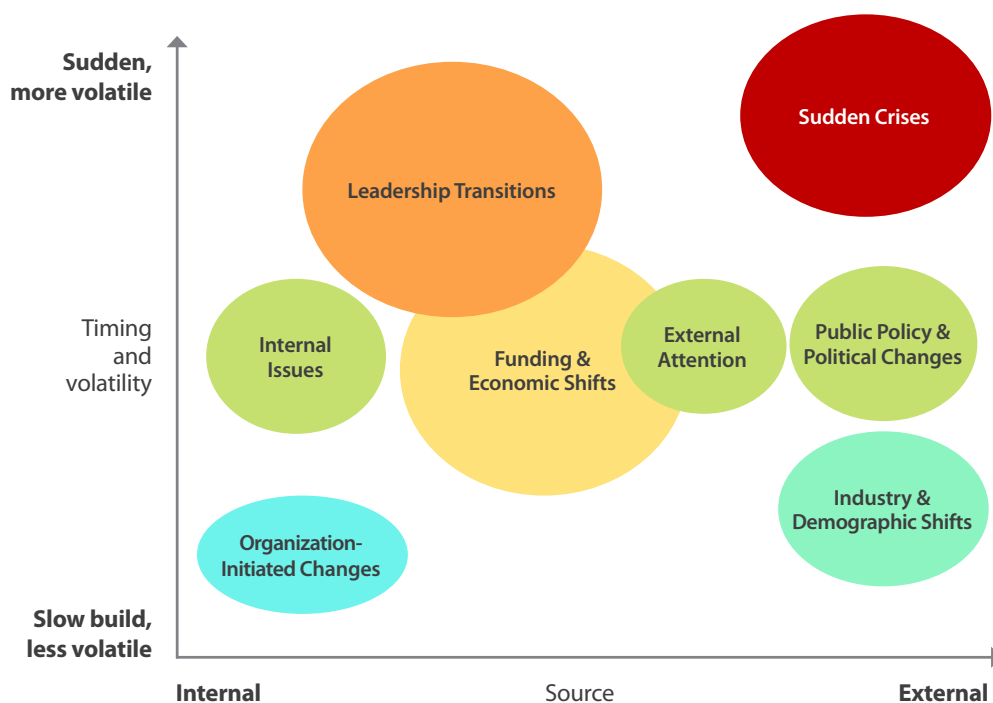
DISRUPTIONS ARE NOT NECESSARILY A BAD THING

The words “disruption” and “shock” have a negative connotation. But disruption isn’t always a bad thing. Organizations that exhibit the greatest resilience are often those that view disruption as an opportunity to advance their work. As one nonprofit leader put it, “We’re oriented toward taking advantage of a situation for the better.” KQED’s John Reilly even found an upside to a ransomware attack. “While I wouldn’t wish what happened to us on anyone,” he said, “the crisis provided a rare opportunity to modernize our systems efficiently and effectively.” Sometimes a nonprofit will create the disruption itself – for example, by launching a major capital project or changing its funding model. The Center for Youth Wellness’ most recent disruptions were products of its own success – a major policy win and its founding CEO taking on a new role as California’s surgeon general. Disruptions can serve as the spark for needed growth and change, no matter where they come from.

While disruptions, by their nature, can be hard if not impossible to predict, one thing is certain – nonprofits will increasingly face shocks and surprises of various kinds. But as our interviews revealed, those nonprofits that get intentional about building organizational resilience are far better at adapting to disruptions when they strike, positioning themselves as increasingly relevant to the changing context. Rather than fearing disruptions, nonprofits together with funders can normalize them. They can be in dialogue about future uncertainties, current disruptions, and what it will take to respond and adapt with greater ease – so that disruptions are less disruptive.

The nature of nonprofit disruption

The nonprofits we interviewed experienced a range of disruptions – all of which are highly context specific.* What constitutes a shock or disruption – and determines its intensity – varies by organization. In this chart, the size of the bubble indicates how frequently that shock was mentioned by the nonprofits we interviewed. The color of the bubble indicates the “heat” or intensity of the disruption, with blue being the least intense and red being the most.



* A full list of organizations interviewed and the specific disruptions they experienced can be found in the appendix (page 64).

Disruptions: A closer look

DISRUPTION CATEGORY	DISRUPTION ILLUSTRATIONS
Sudden crises	Natural disasters, like wildfires and floods Cyber attacks Infectious disease outbreaks
Leadership transitions	CEO transitions, in particular founder transitions and sudden leadership changes
Public policy and political changes	Policy wins that allowed a nonprofit to declare victory and prompted a shift in the organization's focus Policy battles, in particular assaults on human rights and related growth in demand for nonprofit services Significant shifts in the political environment
External attention	Investigation Media attention
Funding and economic shifts	Recessions and economic booms Rising costs of living and operation Loss of key donors due to shifts in funding priorities
Internal issues	Governance conflict Discrimination and harassment conflict Racial equity tensions Headquarter/affiliate tensions Fraud
Industry and demographic shifts	Technology-driven changes in the marketplace Industry competition and new entrants Increase/decrease in demand for services Displacement of communities served
Organization-initiated changes	Capital projects, like new buildings Scaling initiatives

Seven characteristics of resilient organizations

So, what does it take for nonprofits to respond and adapt to shocks and disruptions of all kinds? Through our research, seven characteristics stood out as critical to resilient nonprofits:



1. Purpose driven

A galvanizing commitment to mission, meaning, and values



2. Clear eyed

Challenges faced head on while maintaining faith in ultimate success



3. Future oriented

Forward-looking planning practices for navigating an uncertain future



4. Open

Intentional communication with internal and external stakeholders



5. Empowered

Inclusive organizational culture that embraces shared leadership



6. Committed to self-renewal

Space created for rest and rejuvenation



7. Connected

Supported by personal relationships, institutional links, and community networks

These seven resilience characteristics lift up the qualities and practices that matter most when nonprofits are managing through significant change and challenge. And while there is interrelationship between these seven characteristics, each plays a distinct role.

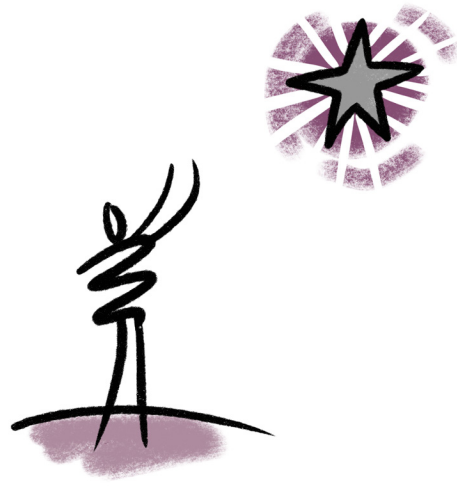
We offer these seven characteristics as a compass for navigating turbulent times, not as a predetermined set of directions. Adapting to shifting circumstances and building the capacity to do so is messy, complex, and context-specific work. “It’s always ten times messier than you can ever imagine,” said Kriss Deiglmeier, former CEO of Tides. “Every decision has a counter decision and you use your best judgment. You’re never done with resilience.” Indeed, these seven characteristics do not assume a steady state or a linear pattern of organizational development. Resilience is always in flux as nonprofits grapple with shifting circumstances.

In addition to these characteristics, interviewees spoke at length about the importance of the fundamentals: a financial cushion when new and hard-to-predict demands are being placed on the organization; ready access to the talent needed to respond to a disruption (e.g., crisis communications expertise); and solid organizational infrastructure (e.g., up-to-date IT systems, liability insurance). While such fundamentals are unquestionably central to organizational *robustness*, they are different in nature from characteristics essential to organizational *resilience*. Andrew Zolli, author of *Resilience*, explained it this way: “Resilience is not robustness, which is typically achieved by hardening the assets of a system.

The pyramids of Egypt, for example, are remarkably robust structures; they will persist for many thousands of years to come, but knock them over and they won’t put themselves back together.”⁹ In other words, robustness does not determine a nonprofit’s ability to respond and adapt to major disruption. That’s the job of resilience.

RESILIENCE AND FLEXIBLE FINANCIAL CAPITAL

The relationship between resilience and flexible financial capital deserves special mention. There has been extensive research on the importance of access to flexible funding, and this was reinforced in many of our interviews.¹⁰ Several mid-sized and larger nonprofits emphasized how critical it was to have a sizable financial reserve. They also noted the importance of a board supportive of tapping into that reserve when responding in a timely manner to a sudden disruption or to make vital investments in organizational reinvention. Not surprisingly, small nonprofits with operating budgets under \$1 million reflected on how *not* having access to flexible funds during disruptive times was a significant barrier to their ability to bounce back. Access to flexible funding can serve as a springboard for adaptation during turbulent times. The seven resilience characteristics lift up qualities that help leaders put flexible funds to work in times of need.



1. Purpose driven

A galvanizing commitment to mission, meaning, and values

In November 2018, the Woolsey Fire in Southern California tore through the Santa Monica Mountains National Recreation Area. The fire destroyed 21,000 of the National Park Service's 23,000 acres and burned several key buildings, including a facility for youth programming. NatureBridge, a nonprofit with the mission to connect young people to the natural world, ran its Southern California programming out of the facility. Philip Kilbridge, NatureBridge's president and CEO, faced a difficult decision: hold onto his team and try to deliver programs in a different location, or cancel the programming. Kilbridge chose the latter – a tough decision that meant letting go of all but three members of the Southern California staff. But the decision enabled the organization to focus on its mission. One of the Southern California team members that stayed on shifted her work to exploring alternative programming options for serving kids in the wake of future environmental disasters. "Be clear about your North Star, and how you are going to use that to guide tough decisions," advised Kilbridge. "Be clear about who ultimately you are serving."

Among the leaders we interviewed, Kilbridge was not alone in lifting up purpose as a guide and motivating force. Jessica Nowlan, executive director of Young Women's Freedom Center, spoke of the energy she gets from her organization's feminist grassroots perspective and fierce commitment to spreading that worldview. When her organization found itself on the brink of dissolution, Nowlan worked tirelessly to move the nonprofit toward sound financial footing, fueled by a sense of purpose. Today, Young Women's Freedom Center is exerting increasing influence on criminal justice reform in San Francisco. "It's not about the organization," Nowlan explained. "It's about the idea of the organization and its political framework and creating a society that operates more from this framework." We heard similar comments from other nonprofit leaders. When reflecting on what helped them manage through shocks and disruptions, they nearly always pointed to their commitment to their organizations' larger mission and "the difference we're making in the world."

An unwavering focus on purpose and impact provides meaning and motivation to people and organizations mired in challenge. “The search for meaning ... is the way resilient people build bridges from present-day hardships to a fuller, better-constructed future,” wrote author Diane Coutu. “Those bridges make the present manageable ... removing the sense that the present is overwhelming.”¹¹ Max Stier, CEO of the Partnership for Public Service, a nonprofit dedicated to making government better, reminded his staff of the organization’s purpose when, in 2017, some staff members raised concerns about the Trump administration’s position on shrinking the size and role of the federal government. The organization supports management reforms, but some employees wondered if they should support political leaders whose actions might be contrary to the organization’s values. Stier responded by helping staff “digest their feelings and see why our work was even more important than before.” Said Stier: “This was an instance where I felt that this was my job – to offer people a vision of hope and mission. The Partnership has never been about the size of the federal government. It’s about effectiveness.”¹²

Importantly, in resilient organizations this commitment to purpose and mission is not held just by those at the top. It’s shared and often expressed through a set of organizational values or a common analysis of what’s needed to make change. Interviewees spoke of using their values as a compass to help re-center staff on the work and find alignment in times of confusion and conflict. As Sustainable Conservation’s Pamela Sergio put it: “We rely on our organizational values when knotty issues come up, [inviting staff to express] how they see these values in action.” Similarly, when Guidestar (now Candid) faced fierce blowback upon flagging 46 nonprofit profiles as hate groups on its website, staff were able to voice their diverse political perspectives and ultimately align around their shared commitment to provide objective information on nonprofits. For the California Academy of Sciences, the organization’s core values “bring people together,” and serve as a consistent touch point. “Values are prominent during our hiring process, and we revisit our core values during the planning process every year,” said the California Academy’s Stephanie Stone.

“Be clear about your North Star, and how you are going to use that to guide tough decisions. Be clear about who ultimately you are serving.”

PHILIP KILBRIDGE
NatureBridge

2. Clear eyed



Challenges faced head on while maintaining faith in ultimate success

For the United Philanthropy Forum, reality hit home when there was a CEO transition and only six months of operating funds in the bank. Faced with the potential of shuttering the organization, the board stepped back and asked the tough questions: Why do we exist? Should we exist? Do we have a role to play? Instead of jumping into an executive search process, the board used the disruption to reassess its organizational mission and, ultimately, craft a galvanizing new vision.

Resilient leaders and organizations are clear eyed about the challenge at hand, what it's going to take to overcome it, and what's possible given the resources available. Jim Collins famously writes of this phenomenon in *Good to Great*. He tells the story of James Stockdale, a high-ranking naval officer who served for seven years as a prisoner of war in Vietnam. While enduring horrific and repeated torture, Stockdale focused his energy on trying to make life more bearable for his fellow prisoners. In other words, he accepted the reality of his situation *and* tried to find hope. Said Stockdale: "You must never confuse faith that you will prevail in the end – which you can never afford to lose – with the discipline to confront the most brutal facts of your current reality, whatever they might be."¹³

Confronting the facts requires perseverance. Pam Iorio, President and CEO of Big Brothers Big Sisters of America, spoke of the long-term, consistent effort that was needed to steer her organization through a host of disruptions, including a federal audit and investigation of grants. "Resilience is about waking up every day and making a little bit of progress," she said. "No matter how big the mountain, all you can do is climb a little bit each day." Consumer Reports' Shar Taylor used a similar metaphor to describe the importance of tangible wins for maintaining the stamina needed to build long-term resilience: "We got to the first mountain and now we can look to the next one. It's really important to look back over your shoulder and ... remind yourselves how far you have traveled and how much was accomplished."

Clear-eyed perseverance is also a central ingredient of an individual leader's personal resilience. Such resolve helped the National Immigration Law Center's Marisa Aguayo maintain confidence in her ability to respond to the massive influx of donations the organization received following Donald Trump's election and the concurrent assaults on immigrant rights. Reflecting on the wild ride of the first half of 2017, she said, "You have to have the mindset that crazy things are going to come at you and you're going to learn how to navigate in a new way. You figure out how to flow through it in as streamlined and graceful a way as you can."

"Resilience is about waking up every day and making a little bit of progress. No matter how big the mountain, all you can do is climb a little bit each day."

PAM IORIO
Big Brothers Big Sisters of America

INVENTIVE: CRAFTING SOLUTIONS WITH AVAILABLE RESOURCES

Acceptance of the facts coupled with a relentless commitment to a higher purpose invites an inventive approach toward problem solving, or "bricolage" – the ability to make do with whatever is at hand.¹⁴ Many of the nonprofit leaders we spoke with were "bricoleurs," inventing new solutions from limited resources. When HOPE Services Hawai'i, Inc.'s CEO Brandee Menino sprang into action after the eruption of the Kilauea volcano, marshaling resources with impressive speed to build new micro unit shelters for the very first time, that was a form of bricolage. "She knows how to make lemonade out of lemons," said Hawai'i Community Foundation's Chris Van Bergeijk. "In a disaster, people gravitate to the person who will not take 'no' for an answer and will get the job done."

3. Future oriented



Forward-looking planning practices for navigating an uncertain future

Having a future orientation means regularly looking to the horizon, anticipating what's next, and adapting to what's emerging. Brandon Nicholson, founder of The Hidden Genius Project, says he looks at his rapidly growing organization "relative to where we need to be tomorrow. That should be the driver." While conscious of not biting off more than he can chew, he stays focused on future potential: What could a fully staffed additional site accomplish? How many more black youths can we train and mentor in technology? Like Nicholson, John Eckstrom, CEO of SHELTER, Inc., also focuses on the future. Eckstrom is helping his organization adapt in order to serve the growing San Francisco Bay Area homeless community. "You have to be able to look out into the future and be willing to make the changes to keep up with the times," he said. For Eckstrom, this has meant expanding SHELTER, Inc.'s services to neighboring counties, as well as adapting programmatically by embracing a model of care that integrates primary care, mental health, and substance abuse with intensive case management to enable self-sufficiency and multiple housing models.

Research on corporate resilience reveals a similar emphasis on this future orientation. Many corporations fail when management gets stuck on an existing business model and can't pivot to embrace a new future – such as when former book retail giant Borders didn't plan for a market driven by ecommerce and digital media. Researcher Ian Turner put it starkly: "When facing seismic shifts in [their] business environment, companies that practice so-called status quo management are doomed." The opposite reaction is something Turner calls "anticipatory management," a leadership orientation that involves not only anticipating trends in advance but also launching major changes in structures, systems, and processes proactively.¹⁵

"You have to be able to look out into the future and be willing to make the changes to keep up with the times."

JOHN ECKSTROM
SHELTER, Inc.

One practical tool for navigating uncertainty and preparing to make swift and thoughtful decisions in moments of disruption is scenario planning – a process for envisioning a range of future possibilities in order to inform strategy and manage through change as it unfolds.¹⁶ Indeed, several of the nonprofits we interviewed regularly rehearse alternative futures in an effort to better prepare for potential disruption. Among them is KQED, the Bay Area’s Public Broadcasting Service. When the organization was hit by a ransomware attack in 2017, the IT department – which has a scenario planning practice – jumped into action. Within a few days of the attack, staff had engaged the FBI, assessed the situation, decided not to pay the ransom, and put interim communications systems in place. “It was really effective decision-making in a moment of triage across the organization,” said KQED’s Maria Miller. “We had recently done scenario planning, and a lot of these forward-thinking things we had worked out beforehand.”¹⁷

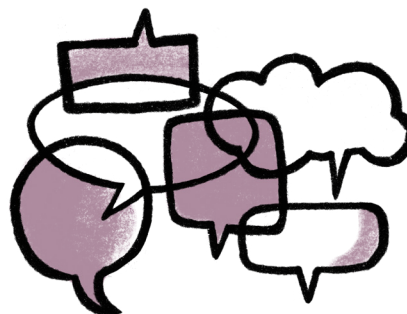
The National Immigration Law Center (NILC) also uses scenario planning to manage uncertainty. “In the summer of 2016, I was starting to see the writing on the wall and was really concerned,” said executive director Marielena Hincapié. “I was watching what was happening around the world – Brexit, the peace process in Colombia falling apart. I wanted us to be prepared.” So NILC staff engaged in a scenario planning exercise that considered what a Trump administration and a Clinton administration could mean for their work. What laws might Trump try to implement? What about Clinton? They then used the scenarios to do the next step of preparation – identifying potential legal questions they would need to act on, drafting fact sheets for the immigrant community concerned about their rights, and preparing a press statement and donor appeal so that they were ready to act immediately following the election.

In addition to future-oriented practices like scenario planning, many of the nonprofit leaders we interviewed also invested in highly inclusive planning processes. The California Academy of Sciences cultivated shared ownership of its new building, inviting employees and community members to engage at multiple points of the planning process. For NILC, inclusive planning has meant working with partner and allied organizations to collaboratively craft a long-term vision for the movement. Said Marielena Hincapié, “We’re co-leading [a process] with 40 to 50 groups to develop a long-term vision and shared narrative for a more inclusive and just society.”

Future oriented and inclusive planning practices are reinforced by cultures of learning and improvement. Reflecting on what has helped them manage rapid growth, the publisher of CalMatters, a nonprofit news organization, said, “This is a learning environment. There is a willingness to constantly look and reevaluate. Have we succeeded in building a sustainable model? What has worked? What hasn’t? We learn and make adjustments on the fly.” This learning and adaptation is often enabled by the systematic collection of data. At Consumer Reports, leaders use an enterprise-wide scorecard to track the organization’s progress with a range of measures, including reach, culture, and revenue. The scorecard serves an important aligning function. Leaders at Consumer Reports are now working to develop impact metrics that, in a similar manner, will help them move beyond anecdotal evidence and better understand how the organization is making a difference in consumers’ everyday life. ECHOS, a health and social services organization, gathers anonymous feedback data from clients to better improve services. By systematically collecting feedback from clients, the organization was able to dramatically reduce client wait times for services. Routinely gathering and reviewing client feedback has changed the organization’s culture to be more responsive to client needs and dedicated to continuous improvement.

4. Open

Intentional communication with internal and external stakeholders



Honest and direct acknowledgment of a disruption, the organization's current state, and its plans for moving forward is critical to keeping stakeholders on the same page and inspiring trust during times of uncertainty. Ensuring that this information is communicated clearly and consistently is also important. As Sustainable Conservation's Pamela Sergio said about communications while managing through rapid growth, "I can't emphasize enough the importance of consistency with communications – internally as well as externally. This has made a real difference. It pairs with transparency and it builds trust. When you have trust, you have resilience."

For Sergio and others, this means keeping staff and external stakeholders up to date on what is and isn't known, setting expectations for what's going to happen and what needs to get done, and providing context on major decisions. Social Advocates for Youth's Elizabeth Goldman emphasized the importance of openness around the impact of government budget cuts on her organization: "I'm a big believer in setting the expectation that 'you're going to hear from us.' We communicated very openly that we were going to make the decisions necessary to bring our agency to a good stable place. We helped people hear the real story."

When Guidestar (now Candid) faced strong backlash for flagging certain nonprofits as hate groups based on Southern Poverty Law Center data, the organization quickly engaged a crisis communications firm to handle external communications, while also ramping up its own internal and external communication efforts. A stakeholder support team answered phone calls and emails; internally, leadership kept staff updated and hosted regular town hall meetings for staff to ask questions and voice concerns. Some nonprofit leaders shared regrets about not doing more to be transparent with staff and other stakeholders in this way. Some saw in retrospect that they underestimated the frequency and depth of stakeholders' information needs, while others pointed to a lack of dedicated communications talent who could ensure that information was clearly and consistently shared.

From our interviews, it seems that multiple communications channels and opportunities for two-way engagement are key to cultivating open and transparent organizational cultures. Interviewees spoke of creating space for staff to ask any and all questions, inviting feedback through anonymous surveys, holding regular staff meetings, and sitting down for one-on-one conversations. Elizabeth Goldman lifted up the use of multiple channels at Social Advocates for Youth: “We do brown bag chats where staff come and ask questions about the transition. We invite them to come and talk to us directly. Also, anyone can calendar on anyone else’s calendar.” The Partnership for Public Service also engages staff in multiple ways. These include an annual staff survey, with full results shared and discussed with staff; “stay interviews” in which leaders sit down with high-performing staff to explore their perceptions of how things are going; and “pulse surveys” for getting a read on how staff are feeling about a given change underway. Finally, interviewees also emphasized active listening and engaging with profound respect for what the news might mean to those who are hearing it for the first time. Said Sustainable Conservation’s Pamela Sergio: “Communication is not just what you say, it’s how you listen.”

“Communication is not just what you say, it’s how you listen.”

PAMELA SERGIO
Sustainable Conservation

4. Empowered

Inclusive organizational culture that embraces shared leadership



Resilient nonprofits have cultures of empowerment that are grounded in inclusivity. Staff are invited to make their voices heard, to co-create solutions, and to share leadership, especially in turbulent times. Leaders of resilient nonprofits actively flatten hierarchies and share power with their teams.

In the aftermath of natural disasters, for example, executive directors have turned to their teams for solutions. Cathy Moore, executive director of ECHOS, recalled the lasting effect of her team's response to Hurricane Harvey: "We would meet every morning [to figure out] who was doing what," she said. "Different staff members led each day's meeting. They would point out things we didn't know were happening. Other staff made suggestions and chimed in. We still do that now, Monday through Thursday. It has changed the dynamic of the team." After the 2017 North Bay fires in California, Social Advocates for Youth also relied on a team solution. The nonprofit was struggling to meet the needs of young people displaced by the fires and trying to continue services with a facility damaged by smoke. Elizabeth Goldman recalled, "A number of experienced long-time leaders in this organization [came up with our programmatic response]. I kept saying, 'What do you need? What are your hearing? Don't be limited right now.'" It was the staff who led the way.

These nonprofit leaders also intentionally work to create organizational philosophies and structures that invite power sharing. "One of the most flawed things about our justice movement is pedestal leadership," shared Young Women's Freedom Center's Jessica Nowlan. "It is detrimental to movements. It is our role in positional power to create space for others to lead." At the Center for Youth Wellness, the new CEO, Jim Hickman, is flattening his organization's hierarchy as it transitions away from being founder centric. "A lot of what I'm doing is helping people see how their work connects to this broader movement," he said. "We just launched our North Star Work Group. It's made up of all frontline staff advising me from the bottom up."

While interviewees highlighted the importance of inclusive engagement and distributed leadership, they did not advocate consensus-driven decision-making. On the contrary, the ability for top leadership to appreciate diverse perspectives while exercising their decision-making power emerged as critical, especially when needing to move fast. As Consumer Reports' Shar Taylor mused: "How do you get the benefit of the expertise around the organization, have people still feel empowered to lead, and yet move in an agile way? We need to engage people and we need to keep moving fast. We can't be driven by consensus."

Additionally, several leaders called out the importance of having diverse staff whose lived experience helps the organization understand and connect with the communities they serve. At the Young Women's Freedom Center, which serves system-impacted young women and communities of color, the majority of staff has been in or impacted by the incarceration system. At the National Immigration Law Center (NILC), connection to immigrant communities has been vital to the nonprofit's ability to shape a strong and relevant mission. "One of our greatest assets is our staff," said former NILC communications director Adela de la Torre. "A lot of us are deeply connected to the immigrant community. The idea of a Muslim registry was really real for staff who was part of the post-9/11 registry. These are not just hypothetical programs and threats, but things that people have lived through."

Leaders grappling with shifts in their industries and communities spoke of diversity, equity, and inclusion at all levels of the organization as important ingredients in its ability to adapt. A few interviewees shared stories of cultural disconnects and power imbalances between majority white leadership and staff of color in organizations that serve communities of color. For these organizations, transitioning to having people of color in the lead connected them more strongly to the people they serve – and to frontline staff. Jennifer Wei, former COO of Techbridge Girls, reflected on how this dynamic played out during a significant leadership transition in her organization: "We hired a leadership team who are all people of color. This has really helped us adapt our curriculum and programming to be more aligned with the communities [we serve]." Attracting a more diverse staff has also been central to Consumer Reports' efforts to retool for a digital era. Flexible telecommuting policies and a complimentary commuter shuttle from New York City to Yonkers helped in recruiting a workforce that is more diverse, digitally savvy, and reflective of the changing face of American consumers.

Authentic empowerment of teams is deep and long-term work that can require leaders to step into tough conversations and make themselves vulnerable. This was the case for leadership of a nonprofit responding to staff demands for deeper commitment to racial equity. The organization shifted its response from a focus on technical fixes like new employment policies toward transforming organizational culture. This has meant embracing difficult and direct conversations about equity, and doing so with humility. "When stuff is hard and you're struggling, showing your own vulnerability is critical," said the CEO. "The notion is that we'll figure this out. We're going to get better."

"One of our greatest assets is our staff. A lot of us are deeply connected to the immigrant community. The idea of a Muslim registry was really real for staff who was part of the post-9/11 registry. These are not just hypothetical programs and threats, but things that people have lived through."

ADELA DE LA TORRE
National Immigration Law Center

6. Committed to self-renewal

Space created for rest and rejuvenation



The nonprofit leaders we interviewed acknowledged the deep emotional and physical effects of managing through turbulent times – the sheer magnitude of the work, the drive to fulfill purpose, the personal trauma sometimes associated with disruption, and the often overwhelming complexity of leading an organization through uncertainty. As the Hawai'i Community Foundation's Chris Van Bergeijk observed, "Rallying around disasters takes its toll on family life and the nonprofits. You're stretching, stretching." She added that during such times, having leaders who take care of their people is critical. Actively attending to staff well-being requires real intentionality, especially when managing through turmoil. "The natural state is to live and breathe our work ... We feel like we can't sacrifice a minute," reflected Mark Wier of the American Civil Liberties Union (ACLU). Yet steering an organization through an emergency can leave leaders and their teams vulnerable to overwork, exhaustion, and burnout. The ACLU has responded to the stress by investing more around wellness and encouraging people to use their vacation days, promoting the understanding that "we're all in this together."

Recent research into personal resilience underscores the vital importance of self-care. As positive psychologists Shawn Achor and Michelle Geilan point out, there are negative effects to "toughing it out" for long periods of time. "The key to resilience," they assert, "is trying really hard, then stopping, recovering, and then trying again."¹⁸ Luckily, many nonprofit leaders recognize the necessity of recharging and actively caring for themselves and their teams. "We have to model the kind of world that we're building," said Young Women's Freedom Center's Jessica Nowlan. "I have to practice the kind of deep self-care that I'm advocating." When asked about what strengthens him personally as he leads a rapidly growing organization, Brandon Nicholson of The Hidden Genius Project said: "I'm a lifelong practicing Buddhist. I make sure I'm centering myself. It's also important for me to be able to maintain a positive and hopeful outlook. From there, it's having creative people who are peers in the work, and mentors who can share their experiences and provide guidance."

"We have to model the kind of world that we're building. I have to practice the kind of deep self-care that I'm advocating."

JESSICA NOWLAN
Young Women's Freedom Center

In addition to caring for themselves, leaders of resilient nonprofits care for their teams by regularly celebrating hard work, encouraging staff to take time off, offering dedicated opportunities for self-care, and creating forums where staff can better understand the emotional, or even traumatic, experience they may be going through. Several leaders lifted up how essential it is to be intentional about regular breaks and celebrations, especially when the team is working at full speed in response to a major disruption. At Consumer Reports, staff accomplishments in areas like social impact and diversity and inclusion are recognized with its annual Exceptional Cultural Influencer award.

Some nonprofits are crafting opportunities for staff to define their own self-care needs. At the National Immigration Law Center (NILC), leadership established a wellness fund that individual staff members can use to care for themselves in ways that are meaningful to them, such as taking a dance class or getting extra childcare. NILC has also created spaces for staff to address the trauma of the moment. As Marielena Hincapié shared, “We have a lot of immigrants on staff who are being directly impacted. We have a number of staff with undocumented family members. I had a brother who was denied citizenship. It was deeply personal. We started creating spaces [for staff] to talk about it and express what they [were] feeling.”

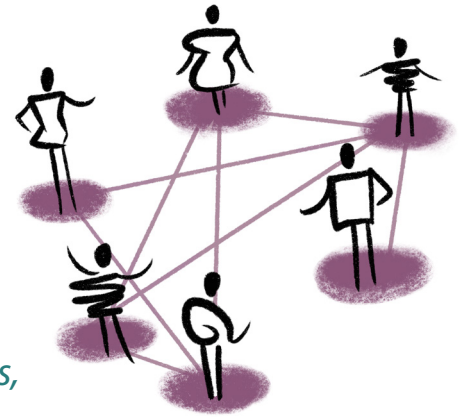
Disruption and the organizational adaptation that follows can also cause anxiety among staff. When Sustainable Conservation experienced a period of rapid growth, leadership put handrails in place to help staff with “different levels of tolerance for change.” According to Pamela Sergio, director of HR and administration, “We did some sessions about the change cycle and understanding where you are. It was helpful to put some language around what people were experiencing.”

“I’m a lifelong practicing Buddhist. I make sure I’m centering myself. It’s also important for me to be able to maintain a positive and hopeful outlook.”

BRANDON NICHOLSON
The Hidden Genius Project

7. Connected

Supported by personal relationships, institutional links, and community networks



Many organizations that bounce back from disruptions feel connected rather than alone – and this helps fuel their recovery and adaptation. Reflecting on their own individual resilience and their organizations' ability to adapt and thrive, interviewees spoke of the benefits of being connected to close-in advisors, groups of peers, institutional networks, and broader communities that rally around them during tough times.

Personal relationships. Tight personal connections proved invaluable for many leaders.

Interviewees frequently spoke of their reliance on people they can be vulnerable around and can call on for support when times are tough, like coaches and close-in advisors. Jennifer Wei, former COO of Techbridge Girls, reflected on what it took to manage through a convergence of disruptions when the organization was expanding to new geographies and undergoing a founder transition: "I allowed myself to be more vulnerable. I said, 'we're in crisis' and asked for help. I relied on advice and support from my personal and professional network who wouldn't let me fold." The importance of such social support has been well established by researchers. "We are biologically social creatures needing social support as much if not more than we need a roof over our heads to be healthy and strong," said Center for Youth Wellness' Rachel Gilgoff. "Everyone needs a hug or a shoulder to cry on – more specifically a person who can draw out our strengths and give us hope to get through the tough times."

Both formal and informal peer networks are another source of advice and support for many nonprofit leaders. ECHOS' Cathy Moore spoke of how helpful it was to be part of the Alliance for Community Assistance Ministries (ACAM) when she was leading the organization's response to Hurricane Harvey in 2017. Through ACAM, Moore was able to access both

"The importance of such social support has been well established by researchers. We are biologically social creatures needing social support as much if not more than we need a roof over our heads to be healthy and strong."

RACHEL GILGOFF
Center for Youth Wellness

mentorship and disaster response best practices. Community Foundation of Sonoma County CEO Elizabeth Brown benefited from similar peer support when crafting her organization's response to California's North Bay fires. "Being part of the community foundation field was so practical and so supportive," she said. "It was easy to call the community foundations who had dealt with other disasters. There was also lots of outreach in our direction." Some leaders accessed peer support and learning through participation in networked organizational models. "Having a decentralized model allows us to learn from each other. We see members piloting many new projects or techniques, some of which fail and some of which succeed," said Goodwill Industries International's Amy Luttrell about its network of community-based autonomous organizations. "Our network shares information so that together we learn from both failure and success. We help each other to improve."

Institutional links. Established organizational networks and partnerships are another asset that nonprofits can activate in times of need. Several of the leaders we interviewed were able to grow their capacity to respond and adapt by tapping into existing relationships and cultivating more formal partnerships. Through its relationship with the Brotherhood of Elders, a multi-generational mentoring network, The Hidden Genius Project got connected to the David E. Glover Emerging Technology Center, which had space to offer summer programming for seniors but no programming. The Hidden Genius Project had programming but no space. By hosting the program, Glover was able to provide active summer programming – and The Hidden Genius Project didn't have to create a separate facility. Said The Hidden Genius Project Executive Director Brandon Nicholson, "It's a great example of how we were able to move quickly and create a space in the community even though we don't have our own land resources."

Organizational networks that formed around an earlier need can be reactivated by network members during times of disruptions. This was the case when the Kilauea volcano erupted on the island of Hawai'i. Government and social service agencies on the Big Island were already well connected due to efforts to coordinate response to a tropical storm a few years earlier. In addition, the Hawai'i Community Foundation had previously supported building a network for agencies serving the homeless across the state. When the lava started flowing, the agencies had both relationships and protocols in place that enabled them to come together quickly and implement an effective and coordinated response.

"Our network shares information so that together we learn from both failure and success. We help each other to improve."

AMY LUTTRELL
Goodwill Industries International

Community networks. One of the most profound kinds of connection is when nonprofits are supported by the communities they serve. Communities can validate or reinforce a nonprofit's mission, creating a dynamic of mutual support and commitment. This has been the case for Oakland-based Dimensions Dance Theater. The theater has been challenged as the African American families it serves get pushed further out of the city by rising housing costs. Yet many of these families now travel long distances to come to the theater. "People have bought into the mission and they're willing to make sacrifices to make it happen," said Artistic Director Deborah Vaughan. "They see the value of our work and how it transforms lives and they want to stay part of it." In another case, local community networks led the charge in keeping open and ultimately reinventing a community-based nonprofit. When the United Church of Canada discontinued funding for Five Oaks, a retreat and education center outside of Toronto, a diverse group of community members came together and rallied to keep it open. Together, these community members developed an updated vision and mission to serve all faiths and spiritual seekers, crafted deep partnerships with the local Muslim and First Nations communities, and charted a path toward financial sustainability.

How funders can contribute to nonprofit resilience

These seven characteristics of organizational resilience highlight a range of qualities and capabilities that can help nonprofits prepare for, and lead through, significant change and turmoil. However, building resilience is not a solo endeavor. Funders can play an important role in bolstering nonprofit resilience by embracing this new normal and helping nonprofits get ready for inevitable shocks and surprises.

Cultivating resilience will never be a linear journey, nor is it one that is entirely within the control of the nonprofit. Nonprofits can expect periods of growth, setback, and, yet again, disruption. This means that there is no set of tidy boxes to check and that will remain checked once a competency is secured. Rather, nonprofits, along with their funders, must take a holistic and context-appropriate approach to cultivating resilience for the long term.

Funders who want to enhance grantee resilience can experiment with the following set of high-level principles and practices. These principles and practices are not especially novel; they mostly fall under the banner of “good grantmaking.” Most notable, though, is the importance of relationships. Funders can make the greatest difference when they are in authentic relationship with their grantees. As Marcia Parker of CalMatters said, “Close, frank, and respectful relationships between funders and grantees is the secret sauce. You have to have mutual understanding and respect in order for this to work.” Others spoke of moving beyond “transactional donations” and cultivating spaces where transformation can happen – where stakeholders, including funders, can come together, engage in honest dialogue, and develop a shared vision of a better future.

“Close, frank, and respectful relationships between funders and grantees is the secret sauce. You have to have mutual understanding and respect in order for this to work.”

MARCIA PARKER
CalMatters

Principles



Come to the table. Be a student of grantee organizations and their contexts. While lava was flowing into neighborhoods following the 2018 eruption of Kilauea, the Hawai'i Community Foundation was literally at the table, meeting with nonprofit and community leaders in the evenings as they worked collaboratively to build a dynamic understanding of rapidly emerging needs. Staff based in the community showed up regularly for coordination and planning meetings, listened closely to nonprofit and community voices, and figured out where philanthropy could fill gaps. Several other nonprofit leaders underscored the importance of regular funder engagement so that funders can provide meaningful support during times of disruptions. As one executive director said: "Come visit and spend time. The only way you can truly speak up for me is to know my work and see proof of my work."

Stay at the table. Listen intently, remain committed, and give nonprofits the space to craft a response during turbulent times. Several nonprofit leaders shared the importance of being transparent with funders about the disruptions they were experiencing and, then, for funders to remain patient and open to the nonprofit's proposed path forward. When the board of the United Philanthropy Forum (the Forum) began exploring critical questions about vision and mission, the board chair was open with funders about the instability of the current business model, then made a data-informed case for repositioning the Forum. Funders responded by providing support for a collaborative visioning and planning process that became the stepping stone to the organization's future. Several other nonprofit leaders underscored the importance of funders' patience when things are messy and the path forward is unclear. When the Center for Youth Wellness needed to chart a new direction after achieving a major policy goal and having its well-known founder move on, that might have been a natural point for funders to exit. But they didn't. Reflected new CEO Jim Hickman: "Funders were most helpful by continuing to fund us and giving us the opportunity to come back with the new vision."

Indeed, sometimes remaining close and committed can also mean sitting back when a nonprofit is dealing with a disruption. A few of the leaders we spoke with said that they didn't seek out their funders' help while navigating a shock; they felt they had the capabilities and resources to respond to the disruption and didn't need funder engagement, which could distract them from focusing on the challenge at hand. As one nonprofit leader put it: "We didn't want our funders to do more. It was better in this case for them to stay at arms' length." When times are tough ask your grantees how you can help. Sometimes the answer may be: "Just stay with us."

Stand in the nonprofit's shoes. Commit to building awareness of your biases, blind spots, and the power imbalances inherent in funder relationships. The Hidden Genius Project's Brandon Nicholson shared how uncomfortable it can be to step into predominantly white funder spaces: "We are a black-led organization, and when we show up in rooms with program officers, there are not as many of us [people of color] as you would expect or hope to see. When you meet with people outside your background, there's a certain self-consciousness as you know that proximity, trust, and relationships drive funding. You want to come off as sharp and thoughtful, but if you ask for \$20 million, it's hard to shake the assumption that funders will think you don't understand what \$20 million is nor how to manage that money. The first thing I did was hire an accountant to make sure we're on top of the dollars [for that reason]. At this point, we should be comfortable knowing we're good enough, we're smart enough ... Give us as much as you can and we're going to do great stuff with it, like we already have."

Commit to building awareness of your biases, blind spots, and the power imbalances inherent in funder relationships.

Funders need to build awareness of implicit biases and how these biases can shape grantee relationships. Recognizing the many ways that the systems, codes, and cultures of philanthropy perpetuate inequities is critical work. It demands vulnerability, which can feel uncomfortable to those accustomed to positions of power.¹⁹

Be in open dialogue with nonprofits about current and possible future shocks. Funders and nonprofits can learn together and openly explore the kinds of support that are most needed in the event of a disruption, recognizing that what an organization needs in order to bounce back and/or spring forward will change over time (and different nonprofits will need different things). Such an open, dynamic, and holistic approach has characterized the S. D. Bechtel, Jr. Foundation's efforts to build long-term nonprofit resilience as it gets ready to shut down. The Foundation captured its understanding of the many dimensions of nonprofit resiliency in its [Resiliency Guide](#), which serves as a tool for facilitating ongoing dialogue with grantees about resilience capacities and needs.

Funders and nonprofits can learn together and openly explore the kinds of support that are most needed in the event of a disruption.

Keep nonprofits' needs at the center. Funder-driven capacity building initiatives (e.g., convenings, trainings, cohort learning opportunities) were rarely mentioned by nonprofit leaders as critical contributors to their organization's resilience. While other research speaks to the effectiveness of such capacity-building programs, the leaders we spoke with seldom called out funder-driven initiatives as a priority in times of turmoil and uncertainty. For nonprofits invited (or required) to engage in many different funder initiatives, these capacity-building opportunities may or may not be relevant to their needs, especially when responding to disruption. Sometimes it would be preferable to "just get a check." As one executive director said, "We can only do so many capacity-building initiatives." Keeping nonprofits at the center and understanding their context, will help funders better gauge whether and when their capacity-building initiatives may be right for nonprofits.

Practice



Funders should think of the tactics below as illustrative of the many ways to help build the resilience of grantees. What's needed and what will work greatly depends on the individual needs of nonprofits as well as funders' capacities and priorities. Let the principles be your guide: come to the table, stay at the table, stand in the nonprofit's shoes, be in open dialogue and keep nonprofits' needs at the center.

Broker connections. Funders are in a unique position to make connections. Several nonprofit leaders highlighted the contribution funders can make by opening up their networks and serving as a conduit to potential donors, prospective board members, partners, and other sources of talent and expertise. They can act as a bridge between a nonprofit and previously unknown or inaccessible networks and provide the glue that binds and strengthens these connections. Funders can also catalyze networks by creating spaces for nonprofits to connect with peers and allied organizations, forming rich webs of relationships that can be tapped in turbulent times.

Create space to think long term, rehearse future scenarios, and plan. Too often long-term planning is left on the back burner when time and money are limited and immediate needs monopolize attention. This can leave nonprofits both exhausted and vulnerable. "We need to take a deep breath and look around and do the strategy work," said Health Connected's Abi Karlin-Resnick about managing through disruption. "We're building the plane while we fly it. It'd be nice to land the plane and take a deep breath." Funders can help nonprofits carve out the space for intentional, inclusive, future-oriented planning – before a new situation demands it. As part of the Ford Foundation's BUILD program, the National Immigration Law Center engaged in strategic planning in 2015. Being compelled to make space to think strategically and long term helped the organization

prepare for and respond to the 2016 presidential election. Similarly, United Philanthropy Forum could not have done the deep and collaborative planning work that was critical to its reinvention without funder support.

Invest in people. Support the well-being and growth of individual leaders and their teams. Many nonprofit leaders spoke of the benefits of coaching relationships during tough times. They also called out opportunities for self-care. When a long-time executive director needed to step away from her organization due to illness, one funder offered her an individual grant to support her recovery. Other funders offer opportunities for leaders to proactively care for themselves, like O2 Initiatives' Sabbatical Awards, which help high-performing nonprofit executives recharge. Investing in people also means scaffolding for nonprofit staff and teams. Funders can work with nonprofits to support peer learning and development opportunities for staff at all levels. Lastly, it's important to remember to address the basics when investing in people. As one leader reminded us: "The resistance needs childcare."

Provide funding for the core and for the future.

As discussed earlier, access to flexible funding is a fundamental for healthy nonprofits – and it's especially critical when responding to crises. Predictable multi-year and core support provides secure footing that allows leaders to turn their attention to responding to the disruption at hand, rather than focusing on keeping the lights on. Philanthropic funding can also serve as seed capital for the future, when nonprofits are adapting to shifting circumstances, reinventing themselves, and ready to innovate, like the support that funders provided for Consumer Reports' new Digital Lab, which will help the organization reposition itself for the digital age. If a funder isn't in a position to provide flexible core support, more targeted support for capacity building can be critical for helping a nonprofit adapt to change. Moreover, as Jennifer Wei, now organizational effectiveness officer at the William and Flora Hewlett Foundation, said, "Even if you already give general operating support, still consider an additional capacity-building grant as general operating support often goes toward programs and operations, and is not set aside for organizational strengthening work."

FOR FUNDERS GETTING STARTED

For funders considering what actions to take to support nonprofit resilience, we offer a few questions to reflect on as you get started.

- What types of disruptions are your grantees facing?
- Would you know if your grantees were going through turbulent times? If not, how might you invite honest and open dialogue? How might you "normalize" conversations about disruptions? A simple question like "What keeps you up at night?" can go a long way.
- How does your foundation support nonprofit resilience right now? How do your existing habits, processes, initiatives, and collaborations help or hinder nonprofit resilience?
- How might your foundation support nonprofits in their near-term response to disruptions and in building resilience for the long-term? Consider both financial (e.g., general operating support, specific planning grants) and nonfinancial supports (e.g., brokering connections, providing thought partnership).

Build the field of funding. In addition to assisting individual nonprofits, funders can incentivize other donors to support emerging fields of practice, as well as invest in platforms and processes that help groups of allied organizations strengthen their own fundraising efforts. Such field-level support has made a difference for nonprofit news organizations, the majority of which have been launched within the past decade.²⁰ Marcia Parker, publisher and COO of the nonprofit news organization CalMatters, noted that “the increase in philanthropy [for nonprofit news] is because the big media foundations are agitating and acting as ambassadors to the larger philanthropic community. They have brought dozens of new foundations to all of us, especially community foundations that can support at the local level.”²¹ Parker went on to emphasize the critical role of infrastructure organizations, like the Institute for Nonprofit News (INN). In 2016, the John S. and James L. Knight Foundation spearheaded a hugely successful grassroots funding campaign and platform called NewsMatch, where INN newsrooms raise money toward a goal and the monies raised are matched by funds pooled from local and national funders. More than \$7.6 million was raised in 2018.

Make it easy. Keep proposal and reporting requirements light, especially for organizations on the frontline responding to crises. And move money quickly. This is Hawai'i Community Foundation's philosophy when collaborating with local donors and nonprofits to respond to natural disasters like hurricanes and volcanic eruptions. “Go easy on the nonprofits around all the documentation,” said Hawai'i Community Foundation's Chris Van Bergeijk about the organization's experience raising and distributing funds after natural disasters. “Be super flexible. All our disaster donations come to us with no restrictions. This gives us maximum flexibility.”

Disruption: A time for learning and adaptation

Hurricanes, relentless policy battles, profound demographic shifts, leadership transitions, faltering business models – disruptions like these can be the downfall for many nonprofits. But nonprofits on the path to organizational resilience embrace periods of turbulence as opportunities to learn, grow, and adapt.

For resilient organizations, disruptions can be tipping points, rather than tragedies. While the amazing leaders we spoke with would, for the most part, not wish disruption on themselves or others, they found silver linings and recalled pivotal moments sparked by shocks and turmoil. They confronted the reality of their situation head on; held true to their mission; looked to the future in order to navigate an uncertain present; openly shared and discussed what was going on; empowered their teams to act; created space for rest and renewal; and tapped into their network connections. The end result: these nonprofits bounced back even stronger than before.

Importantly, they didn't do it alone. Funders can play an essential role in helping nonprofits cultivate resilience. Through authentic, open, and lasting relationships with their grantees, funders, in partnership with nonprofits, can craft supports that meet the unique needs of the moment. By learning and adapting together, funders can help nonprofits thrive in changing times.

Caminante no hay camino. Se hacer camino al andar.
Wanderer, there is no way. The way is made by walking.

ANTONIO MACHADO

PART FOUR

Stories of nonprofit resilience in action



Context matters. So, it's not surprising that most of our insight into organizational resilience came from nonprofits' individual experiences of turbulent times. In the following stories, we profile seven nonprofits that confronted and effectively responded to a range of disruptions. The large national social enterprise and advocacy organization Consumer Reports and Dimensions Dance Theater, a community-based arts nonprofit, adapted to profound demographic shifts while staying true to mission. HOPE Services Hawai'i, which serves those at imminent risk and experiencing homelessness, and the environmental education nonprofit NatureBridge mounted swift and effective responses to sudden natural disasters and, in the process, introduced programmatic innovations. Both the National Immigration Law Center, which defends and advances the rights of low-income immigrants, and the Partnership for Public Service, which works to make the federal government more effective, navigated upheaval in the policy and political environment with great sensitivity to staff needs during uncertain and, for some, traumatic times. Lastly the networked organization United Philanthropy Forum bounced back from a faltering business model by engaging in an in-depth and collaborative planning process and, ultimately, reinvented itself. Together these stories offer a view into resilience in action – and how funders can help.

ORGANIZATION	DISRUPTION	PRIMARY RESILIENCE CHARACTERISTICS	PAGE
Consumer Reports	Industry and demographic shifts	Purpose driven Future oriented Open	39
Dimensions Dance Theater	Funding and demographic shifts (displacement of community served)	Purpose driven Clear eyed Connected	42
HOPE Services Hawai'i, Inc.	Sudden crisis (lava flow)	Empowered Committed to self-renewal Connected	44
National Immigration Law Center	Public policy and political changes, funding shifts (dramatic increase)	Future oriented Committed to self-renewal Connected	47
NatureBridge	Sudden crises (wildfires, flood, illness)	Purpose driven Clear eyed Future oriented	51
Partnership for Public Service	Political changes, industry and funding shifts	Purpose driven Open Empowered	54
United Philanthropy Forum	Leadership transitions, funding shifts	Clear eyed Future oriented Empowered	58

Consumer Reports

Reinvention for the digital age

ORGANIZATIONAL SNAPSHOT

Year founded:	1936
Annual budget:	~\$250 million
Number of employees:	500+ employees
Geography served:	United States
Nature of disruption:	Industry and demographic shifts
Primary resilience characteristics:	Purpose driven, future oriented, open

The digital revolution has had a profound effect on Consumer Reports (CR), calling into question its historically authoritative position in the market. Adapting to the profound shifts in industry and audience has meant nothing less than reinventing the organization while staying true to the mission to inform consumers' purchasing decisions and protect their rights ensuring a fair and just marketplace for all.

An organization ready for change

Since its founding in 1936 – as the Madison Avenue advertising era was gaining momentum – Consumer Reports has been a trusted source of product information and consumer advocacy. For decades, its widely circulated magazine – which reached a peak circulation of 4,6712,419 in 2007, brought helpful, independently researched information to consumers and its ratings promoted quality, safety, energy efficiency, and value in the marketplace. Subscription revenue from the magazine fueled its efforts.

Fast forward to 2014: the market for print journalism was in steep decline; major consumer products (from smart phones to cars) were now digitized; and Millennials, the first generation of digital natives, were established in the workforce and in the marketplace. In its early years, Consumer Reports was focused on evaluating the safety and reliability of consumer products. But by 2014 the increasing power of digital giants like Google and Facebook, and many other free sources of product reviews, were radically changing how consumers communicate and spend – and this had critical ramifications for CR's business model. At the same time, pervasive use of consumers' data without their consent, understanding, or control presented a whole new set of invisible harms for consumer safety and well-being. The organization's original 20th-century business model and advocacy focus needed a reboot, and the need for trusted information was now even more critical.

Leadership transition sets the stage for transformation

Marta Tellado was named president and CEO of Consumer Reports in 2014. She had spent the previous decade as a senior executive at the Ford Foundation and entered Consumer Reports as a change agent. Her challenge was to create the vision and organization of the future while staying true to purpose, maintaining Consumer Reports' base, and preserving revenue from its subscription model. According to Tellado, "We had to figure out how to serve the loyal subscribers ... and shore up the magazine. [At the same time] how do we vastly improve the online experience, and how do we invest in our technological infrastructure so that we can have a digital transformation?" For Tellado, these questions could be answered by looking to the future and crafting a long-term vision for the organization that aligned with shifting industry and demographic trends.

Tellado and her team developed a four-year plan, focusing first on updating the organization's infrastructure and refreshing its brand. Doing so required board approval to tap Consumer Reports' strategic reserves. "Somehow we have drilled into the nonprofit world that your objective is to balance a budget," said Tellado. "You can do this and fail. If you're not reinvesting in yourself, you won't be able to innovate ... We had to reinvest in ourselves and run a deficit to do this. We had to look five to seven years down the road."

Another important ingredient of the transformation was refining Consumer Reports' focus. VP and Chief Social Impact Officer Shar Taylor said, "We had to focus on where we could lead and where we saw the emerging consumer challenges: the digital marketplace." Such focus meant that the organization would have to end some initiatives that could be better advanced by others and discontinue products that weren't growing new audiences.

Rebooting Consumer Reports' culture

Close attention to organizational culture was essential if Consumer Reports was to live into the organization's new digital first identity. For Tellado, staying true to the mission was critical. "[We were] reassuring people that our mission is not going to change, but we have to show up differently. This is not about a new tagline. It's about an existential threat. We have to be fearless about it." With the mission at the center, Tellado and her team focused on building shared ownership and leadership of the change, which entailed inclusive planning processes, clear and consistent communications, and greater workforce diversity.

Of the 500-plus-person staff, 75% took part in workshops about the organization's identity and the relevance of consumer power today. The process for developing the strategy for digital transformation was similarly inclusive, with multiple opportunities for stakeholders to provide authentic input. Importantly, the strategy left ample space for experimentation and co-creation. COO Leonora Wiener emphasized the importance of experimentation for building shared understanding and ownership of something new: "With any change, you do an experiment and see how it goes. Then try it again and do it in another area. Then more people come on and try that too. You don't do everything from the top down. You allow people to experiment and try things within the larger strategy."

"If you're not reinvesting in yourself, you won't be able to innovate ... We had to reinvest in ourselves and run a deficit to do this. We had to look five to seven years down the road."

MARTA TELLADO
Consumer Reports

Throughout there was significant effort to keep stakeholders up to date on the myriad changes underway. As Wiener said, “This is where Marta’s experience with communications has been such a boon. She knew that you have to communicate early and often and you have to be clear and consistent. If you go into any organization and ask the staff if there is enough communication, they’ll tell you no. Marta has a bi-weekly newsletter that she sends to staff and the board. She also has open invitation – “Coffees with Marta” – for informal small group conversations with staff. We [at Consumer Reports] also hold Town Halls. We organize regular staff updates. And of course we hold many informal meetings ...”

Alongside deeply engaging long-tenured staff in CR’s reboot, growing racial, ethnic, and generational diversity has been an important piece of the culture shift – a priority from both a value and a talent perspective. As Taylor said, “To build for America as it is today, we had to think a lot about increased diversity among our staff, board, and members.” This was challenging for an organization based in Yonkers. Flexible telecommuting policies and a complimentary commuter shuttle from New York City have helped in recruiting a workforce that is more diverse, digitally savvy, and reflective of the changing face of American consumers.

Philanthropy as seed capital for innovation

Philanthropy played a pivotal role in Consumer Reports reinvention. Funders like the Ford Foundation, Alfred P. Sloan Foundation, and Craig Newmark Philanthropies came to the table as partners, supporting innovation and risk taking, and helping the organization retool for the digital era. Moving away from restricted project-based grants and toward enterprise-level relationships with foundations that could yield more future-oriented funding was a critical part of the organization’s transformation. Such investment funding was epitomized by Craig Newmark Philanthropies’ \$6 million gift of seed funding for Consumer Reports’ new Digital Lab, where it is testing the digital tools that are now at the center of everyday life.

Cultivating these philanthropic relationships has been a concerted effort. Prior to Tellado’s tenure, Consumer Reports wasn’t broadly perceived as a social justice organization or even a nonprofit by many funders. Tellado and her senior team actively amped up their presence in the philanthropic and nonprofit community, positioning Consumer Reports as a mission-driven advocate. “Everyone on the team brought relationships to Consumer Reports and an understanding of the philanthropic community that helped us identify potential allies,” Taylor said.

Looking back in order to look forward

Consumer Reports has made huge strides in helping consumers navigate a digital world, both by transforming its members’ digital experience and also by committing to testing and advocating for all consumers’ digital rights. Over the past five years, CR’s digital revenue has grown by 12.6%, making up for the print decline of 12.4%, a trend that is expected to continue.

The launch of its Digital Lab in June 2019 was a major step in this direction, representing the culmination of five years of intense and transformative work. Shar Taylor reflected on the importance of such achievements for creating momentum and bolstering morale and resiliency: “You need those wins along the way ... We got to the first mountain and now we can look to the next one. It’s really important to look back over your shoulder and ... remind yourselves how far you have traveled and how much was accomplished.”

Dimensions Dance Theater

Unwavering commitment to mission during changing times

ORGANIZATIONAL SNAPSHOT

Year founded:	1972
Annual budget (2018):	\$375K
Number of employees:	26
Geography served:	Oakland, California
Nature of disruption:	Funding and demographic shifts (displacement of community served)
Primary resilience characteristics:	Purpose driven, clear eyed, connected

The mission of Dimensions Dance Theater – to showcase and empower African Americans through the transformative power of dance – is just as salient now as it was when it started nearly 50 years ago. Dimensions was founded by Deborah Vaughan, Elendar Barnes, and Shirley Brown at a time when few companies featured African-American artists. “We had been studying dance for years and we wanted to put our work on the stage, but we weren’t seeing ourselves on stage other than when [Alvin] Ailey would come to town,” Vaughan said.

Vaughan had first learned dance through Oakland’s Parks and Recreation department, getting her start under renowned Oakland dancer and choreographer Ruth Beckford. Over the years, generations of Dimensions’ dancers, youth, and teachers formed a vibrant community of African-American artists committed to performing quality dance and to educating the next generation on the importance of art and its ability to transform lives. In the early 1990s, Dimensions Dance Theater’s permanence in the Oakland community seemed solidified when Mayor Lionel Wilson and the City of Oakland provided permanent space for Dimensions and other residential artists in a city building now called the Malonga Casquelourd Center for the Arts.

But over the last decade, the city has changed. With rising housing costs, Dimensions’ families have had to move as far as Antioch, Vallejo, and Pittsburgh, commuting two hours for their children to attend programs at Dimensions. The organization’s relationship with the city has changed, too. Funding for the arts has declined and developers are coming in without community benefit agreements that would support artists. And while the City of Oakland named and provided signage for a Black Arts Movement Business District, no real funding has accompanied it. In addition, the city has not maintained the Malonga building – half of the bathrooms aren’t functional and the theater space is in need of better sound, seating, and lighting. Yet even in the face of these challenges,

Dimensions remains committed to its mission and its constituency, fighting to address mounting challenges. In 2016, when an important cultural mural close to the Malonga Center was set to be blocked by a new building, neighborhood activists and Malonga tenants appealed and ultimately won a community benefit agreement, in which the developers would contribute funds to a new mural and the Malonga Center itself.

While these victories may be few and far between, Anisa Rasheed, board chair and former company dancer, hopes that Dimensions Dance Theater will always be a permanent institution in the Oakland arts landscape. Fueling this commitment is the personal resilience of the organization's staff and members, who remain committed to its mission and are determined to see that the Malonga Center acquire needed resources. "As dancers, we do what we have to do," said Rasheed. "If there's no heat, you just put on some clothes. We're gonna do what we're gonna do, because we love what we do."

Dimensions also continues to look for ways to bring private and public funders together to benefit the arts in Oakland. Realizing that city funding was limited, Dimensions is hoping to partner with the Rainin Foundation and others to support renovations to the building. Challenges will continue to arise until the artists, private funders, and the city are all onboard to build an arts movement that will enhance Oakland.

In some ways, these efforts are reminiscent of the early days of Dimensions, when it had a hard time accessing private funders as a black-led organization. Dimensions now has stable support from a cadre of sources like the California Arts Council, National Endowment for the Arts, Sam Mazza, Hewlett Foundation, and the San Francisco Foundation. But while times may be tough, the organization's commitment remains ever strong. "It's a strange time we're going through," said Deborah Vaughan. "It's not the city we knew, nor the country we thought we were living in. But we look at what our ancestors went through and surely we can get through it, too."²²

"It's a strange time we're going through. It's not the city we knew, nor the country we thought we were living in. But we look at what our ancestors went through and surely we can get through it, too."

DEBORAH VAUGHAN
Dimensions Dance Theater

HOPE Services Hawai'i, Inc.

Activating connections in times of need

ORGANIZATIONAL SNAPSHOT

Year founded:	1989 as the Care-a-Van Program through the Office of Social Ministry; nonprofit affiliate incorporation as HOPE Services Hawai'i, Inc. in 2010
Annual budget:	\$6 million
Number of employees:	60
Geography served:	Island of Hawai'i
Nature of disruption:	Sudden crisis (lava flow)
Primary resilience characteristics:	Empowered, committed to self-renewal, connected

A coordinated response

When the lower Puna lava eruptions on Hawai'i Island began on May 3, 2018, Brandee Menino, CEO of HOPE Services Hawai'i, Inc., expected the call from county officials. Just four years earlier, the island had been hit by Hurricane Iselle; this was a community that knew from experience the importance of coordination. By May 7, county officials, civil defense, and nonprofit leaders like Menino had worked together to set up a resource center, create a streamlined assessment process, and reactivate the island's single intake form to assign and prioritize people impacted by the eruptions.

HOPE Services, which provides housing-focused homeless programs and services, quickly became an important piece of the disaster response, as the lava flow destroyed homes and displaced families. But the organization's leadership also knew they needed to partner with others: "There is not one organization who can do all of the work. [Each agency has to consider] our 'Kuleana,' or responsibility, and what we could take on," said Menino. "HOPE Services could provide transitional sheltering and outreach, and help administer emergency rental assistance. Food Basket was willing to be the agency to take in supplies and distribute them. Another was willing to be the coordinator of hot meals at the shelters. We didn't duplicate services."

Yet this efficient coordination was only possible through a spirit of trust and partnership that had been cultivated across the islands – and included private funders – over time. A few years earlier, the federal government had required all homeless providers to shift from emergency temporary shelters to a "housing first" model. With support from the Hawai'i Community Foundation (HCF), the Housing ASAP network was created, in which Menino and others worked together to train providers in the new model and jointly develop a coordinated entry system for those experiencing homelessness across the state.

Critical resources

HCF came to the table again when the lava started flowing. The community foundation was already familiar with key agencies like HOPE Services from its deep community involvement, and was actively part of lava response efforts – sitting at the table daily, then weekly, then monthly. As a receptacle for private donations, HCF asked community agencies what they needed and were able to respond quickly to provide the necessary resources. The flexible funding grants HCF had previously provided allowed agencies like HOPE to pay for additional staff during disaster response.

The staff was a critical piece of the response. Some HOPE Services staff had experienced homelessness or other types of disruption themselves, and they brought a lot of empathy to their work. They also had contacts or connections with every relevant organization on the island. In the end, it took four months, from May until September, before the lava flows stopped. What helped Menino and her staff manage through an extended disaster response period? Making sure they took breaks, celebrated at critical moments, and kept communication lines open. “My staff was exhausted,” admitted Menino. “We made sure to take the time and were intentional about the breaks and celebrations. We did a lot of check ins. I used to call it the fluffy stuff. But I knew I had to be intentional and not burn out my staff.”

“We made sure to take the time and were intentional about the breaks and celebrations . . . I used to call it the fluffy stuff. But I knew I had to be intentional and not burn out my staff.”

BRANDEE MENINO
HOPE Services Hawai‘i, Inc.

Trying something new

Two-to-three weeks into the eruption, up to 600 people a day were staying in park facilities or tent shelters. Relieving short-term needs for housing was critical, but Menino and others also knew that housing was a long-term issue. Affordable housing on the island had already been in short supply prior to the eruption. Now, with hundreds of structures destroyed in the lava flows, permanent housing would become an even bigger problem. So, when Darryl Oliviera, safety and internal control manager at HPM Building Supply, a local employee-owned company, approached Menino about partnering to build small housing structures on HOPE’s property, she jumped on the opportunity. She had known Oliviera from his previous role as civil defense director for Hawai‘i County, managing emergency response, and she knew HPM to be a strong community-oriented company.

So in yet another strongly coordinated effort, more than 200 community members came out on June 9, just a month after the lava started flowing, and erected 20 micro-unit shelters for the elderly in just one day.²³ HPM provided the pre-fab structures, contractors, and materials at cost, while National Guard services, volunteer contractors, and Habitat Hawai‘i Island provided engineering and project management support on build day. County officials expedited permits while the Hawai‘i Community Foundation provided funds for HOPE to manage the shelter. A community center for meal service as well as facilities for showers and restrooms were also put in. While these units provided short-term housing (and in turn inspired others to build similar housing), Menino knew that they wouldn’t be using it for disaster forever, but could eventually turn it into emergency shelter or affordable housing.

Post-disaster, that's exactly what has happened. The original micro units are now being used to house seniors and adults experiencing homelessness. As Chris Van Bergeijk of Hawai'i Community Foundation said, "The only failure is if you don't try to do something. Brandee is not afraid to try stuff she hasn't tried before. She gets it done without a lot of drama."

Adapting for the long haul

This experience with housing development marked a notable change for HOPE Services. Under Menino's leadership, HOPE Services is now seen as an agency that can say yes and get things done – and community members often ask what it is going to do next. It's an apt question, as HOPE continues to work with HPM to build pre-fab transportable housing. "If you asked me a year ago if this is something I was going to do, I would have said no because that's what private developers do," said Menino. "But with our experience in the micro shelters, and partnering with other business leaders, now our board, staff, and I feel empowered. We can do this." While no one would ever ask for such a disaster, the upside has been stronger connections across the island and for HOPE Services – and the organization has adopted an even stronger role as a leader in the community and as an innovator, who continues to adapt and grow services to meet long-term community needs.

**"The only failure is if you
don't try to do something."**

CHRIS VAN BERGEIJK
Hawai'i Community Foundation

National Immigration Law Center

Making a difference today while planning for a better tomorrow

ORGANIZATIONAL SNAPSHOT

Year founded:	1979
Annual budget (2018):	\$11.2 million
Number of employees (2018):	73
Geography served:	United States
Nature of disruption:	Public policy and political changes, funding shifts (dramatic increase)
Primary resilience characteristics:	Future oriented, committed to self-renewal, connected

Managing through disruption is intrinsic to the National Immigration Law Center's (NILC) mission to defend and advance the rights of low-income immigrants and their loved ones. Founded in 1979, NILC has decades of experience responding to assaults on immigrants' rights. The election of Donald Trump in the fall of 2016 ushered in a new level of intensity of assault, bringing forth a maelstrom for immigrants' rights that had been many years in the making.

NILC demonstrated its ability to respond swiftly and effectively in the face of persistent volatility in the two-and-a-half years spanning that election and the writing of this case study. The organization's litigation efforts challenging the Muslim ban successfully raised awareness about its unconstitutional underpinnings and helped amass a broad coalition led by Muslim, Arab, and South Asian communities focused on fighting it. In addition, NILC mounted a multi-pronged effort to defend the Deferred Action for Childhood Arrivals (DACA) program and recipients. NILC also coordinated a coalition of nearly 400 organizations in more than 35 states to fight back against proposed regulations that, if enacted, would jeopardize the health and well-being of lawfully residing immigrant families struggling to make ends meet.

In this same time frame, the organization underwent massive and sustained growth. In the fall of 2016, NILC had a Twitter following of less than 14,000 and an individual donor base of 700. NILC's followers and donor base both experienced growth spurts immediately following the presidential election. Since then, the nonprofit's supporters and audiences have continued to grow. As of late 2018, NILC had 72,000 Twitter followers and over 21,000 individual donors.

Getting ready

In 2016, NILC was already thinking about sustainable growth and potential adaptations to its strategic approach, due in part to planning discussions initiated through a multi-year commitment from the Ford Foundation for general operating and capacity-building support. With the leadership of long-time executive director Marielena Hincapié, NILC also established a practice of scenario planning – telling stories of the future in order to anticipate emerging challenges and envision a more equitable and inclusive future for the country. The immigrants' rights field had been on the defensive for several years, so NILC began using scenarios to help manage through the uncertainty, conceive future opportunities to challenge the status quo, and shift the dominant narrative away from one that demonizes the immigrant communities to one that celebrates their contributions.

In 2016, Hincapié's foresight and NILC's scenario planning skills helped propel the organization forward. Hincapié reflected, "In summer of 2016, I was starting to see the writing on the wall and was really concerned. I was watching what was happening around the world – Brexit, the peace process in Colombia falling apart ... the [U.S. election] polls had to be wrong. I wanted us to be prepared." In the summer of 2016, NILC began developing scenarios for what immigrants' rights might look like under a Trump administration versus a Clinton administration. It was both a playful and rigorous process. Staff did role playing under each scenario, working to imagine the laws that each administration would likely implement.

With scenarios in hand, the team looked at the implications for NILC and even took the next step of planning, including identifying key legal questions under each scenario so NILC would be ready to reach out to partners after the election, drafting fact sheets to help immigrants understand their rights under the country's new leadership, and even drafting separate donor appeals for Trump and Clinton presidential scenarios. In the early morning on November 9, 2016, as Trump's election was being announced, NILC issued a press release highlighting expected threats to the rights of immigrant and refugee communities, quickly followed by a donor appeal.

Responding to the new context

Although NILC was prepared, the election results were deeply distressing. As NILC senior officer of institutional giving Marisa Aguayo, recalled, "Everyone was really troubled What does this mean for our work? For our families? For our communities? ... We were shaking and trying to get it together to send out the [donor] appeal. Before we even sent out the appeal, our computers started dingding with donations coming in Even though we didn't think we'd have to use it, we were ready with an appeal outlining what we expected to be up against under a Trump administration."²⁴

"Embarking on the strategic framework allowed us to take a step back and dream about what could be possible in 20 to 30 years Initially it was really hard for staff to think this far out because of the urgency of the moment. I was saying to staff and board members, 'let's not be constrained by today's political realities.'"

MARIELENA HINCAPIÉ
National Immigration Law Center

In the months that followed, NILC was operating all hands on deck and all hours of the day in rapid response to assaults on immigrants' rights. In just the first half of 2017, immigrants' rights activists were fighting restrictions against people from several Muslim-majority countries from entering the U.S., threats to rescind the DACA program, increased detentions and deportations, efforts to cut off federal funding to cities refusing to enforce federal immigration laws, and more. While NILC's scenario planning efforts helped the team anticipate the Trump administration's hostility toward immigrants, by the summer of 2017, it became clear that NILC couldn't continue operating in crisis mode. Leadership needed to slow down to invest in the team's well-being, as well as step back and look toward the future.

A long-term vision of hope

"We were experiencing attempts to reshape who we are and what we look like as a nation," recalled Hincapié. It was time to "begin the process of developing a new strategic direction, focused on rethinking who we are becoming as a nation, who we want to become, and how [does NILC] play a role in helping to reshape the identity of the country." According to Hincapié, "Embarking on the strategic framework allowed us to take a step back and dream about what could be possible in 20 to 30 years Initially it was really hard for staff to think this far out because of the urgency of the moment. I was saying to staff and board members, 'let's not be constrained by today's political realities.'"

The result was a new focus on both tactics and directions of strategic importance. These areas included fighting for just laws and policies, creating a pluralistic narrative, and supporting movement building to help achieve a vision of a society in which all people, regardless of income or immigration status, can thrive. For former NILC communications director Adela de la Torre, the new strategic direction allowed the organization "to take a step back when each issue is popping up and decide whether it fits or not. If not, we will be an ally but we will not be leading the fight."

The development of the new strategic priorities led Hincapié to realize that ". . . we also needed this long-term vision for the movement as a whole; a narrative that could really counter the anti-immigrant narrative." NILC is now co-leading an external process to develop a shared long-term vision and narrative among 40 to 50 allied groups. Hincapié says, "We're not institution building. We're movement building. We're intentionally trying to build capacity and health of the broader movement for immigrant rights."

**"We're not institution building.
We're movement building."**

MARIELENA HINCAPIÉ
National Immigration Law Center

A culture of caring

The intense work and stress was taking a toll on staff in the first half of 2017. As the team was rapidly responding to threats in service of broader immigrant communities, many members of the team were being directly impacted as immigrants themselves. "They are not just hypothetical programs and threats, but things people have lived through," de la Torre recalled. Similarly, Hincapié said, "We had someone on our team who had a cousin who was blocked from coming in. We have a number of staff with undocumented family members or who have DACA. I had a brother who was denied citizenship. It was deeply personal. We started creating spaces [for staff] to talk about it and express what they [were] feeling."

NILC has since taken several steps to cultivate a culture of caring for staff who are at the frontlines of creating a better future for immigrant communities to which they're deeply and often directly connected. For instance, an expert in trauma support was brought in to lead a session on wellness and mindfulness for staff. Leadership established a wellness fund through which staff members receive an allotment of funds in each paycheck to dedicate to personal health and well-being. The board actively communicated its institutional commitment to well-being, and leadership encouraged staff to take the time off that they needed to recharge.

Hincapié sees her role in cultivating a culture of caring as being, in part, about "being vulnerable as a leader," sharing what she's going through and how she's caring for herself, with the recognition that others are likely having similar experiences. Another reason to invest in self-care is to maintain high-quality work and, when the time is right, "to responsibly pass the baton on to someone else."

NatureBridge

Building resilience for the long term

ORGANIZATIONAL SNAPSHOT

Year founded:	1971
Annual budget:	\$18 million
Number of employees:	225
Geography served:	California, Washington, Virginia (with participants from 26 states and 10 countries)
Nature of disruption:	Sudden crises (wildfires, flooding, illnesses)
Primary resilience characteristics:	Purpose driven, clear eyed, future oriented

Well rehearsed in managing through disruption

NatureBridge, an environmental education nonprofit that runs overnight programs in national parks, is no stranger to the risk, uncertainty, and inevitable disruptions that come with programming in nature. Major floods wiped out NatureBridge programs in Yosemite for several months in 1997. The 2012 Hantavirus outbreak also resulted in closure of the Yosemite campus. Smoke from recent California fires has impeded programs, as have government shutdowns that temporarily shut down national parks. That's not to mention run-of-the-mill pests and viruses, like bed bugs and Noro Virus, which have also led to campus closures. Reflecting on the magnitude of disruptions in 2018, one NatureBridge staff member said, "Take the worst events of any given year, then add a steady drip of other major disruptions."

Swift response to disruption, guided by purpose

In the fall of 2018, NatureBridge was preparing for its 2019 program year in the Santa Monica Mountains National Recreation Area. Fall in California is typically dry, windy, and fire prone. NatureBridge scheduled its programs, accordingly, for later in the winter and spring. Then, on November 8, 2018, the Woolsey Fire broke out in Southern California, burning nearly 97,000 acres of land and destroying 1,643 structures, including not only national park lands but Camp Shalom, the facility where NatureBridge ran the majority of its program. NatureBridge staff also had to flee their office at Circle X Ranch, taking everything they could. Thankfully, no students were on site at the time and all staff made it out safely. Next came the difficult part: deciding what to do about upcoming programs, slated for January through May 2019, and managing the ripple effects of that decision.

As the fire was still burning, NatureBridge leadership recognized that people were going to be immediately reaching out for information about upcoming programs. Leadership had to make the best decision they could with the information at hand. It was mid-November, and programs were scheduled for February. Leaders wouldn't be able to get onsite to assess the situation for several months. They looked at a range of options for serving the kids signed up for programs in Southern California. Could the organization move its programs? Could it run a tent camping program in the Santa Monica Mountains? Could it simply postpone the program?

In light of the uncertainty around the Santa Monica site and the financial consequences of indecision, the Southern California leadership team decided to cancel the programs. Within two weeks, ten of NatureBridge's 22-person seasonal and full-time team serving Southern California were let go and/or unable to find other employment within NatureBridge. It was an intense, difficult, and sad time, but leadership were confident that it was the right move for the organization's overall mission. Reflecting on the situation, CEO Phillip Kilbridge said, "If we make bad short-term decisions driven by emotion, we put our entire organization, and the students we serve, at risk. We have to keep our compass focused – we are in business to get kids out there on trails, not to keep people employed."

Being a mission-driven organization, the layoffs had an especially strong emotional impact. COO Judy Lin emphasized the importance of trying to develop an understanding among staff for why the decisions were made. In staff communications, she "focused on the overall mission and sustainability of the organization as part of the rationale," and then made a link to the potential impacts to other parts of the organization if the expenses of the Santa Monica site continued without students or programs.

Both Lin and Kilbridge emphasized the importance of providing as much context and transparency as possible, anticipating conflict and hard conversations, and then engaging with empathy and ensuring that staff felt honored and cared for. This included Kilbridge traveling to Southern California and meeting with each staff member personally. According to Kilbridge, "This is part of resilience – making hard choices quickly, swiftly, and with as much empathy as you can. These team members were rightly sad, angry, frustrated, and more."

"This is part of resilience – making hard choices quickly, swiftly, and with as much empathy as you can."

PHILLIP KILBRIDGE
NatureBridge

Bouncing back and looking to the future

NatureBridge has used this moment of disruption and scaling back as the impetus to invest more deeply in its future. The organization kept on a staff member from the Santa Monica team to lead an assessment and planning project that explored a range of alternative programming options for serving kids. Leaders were particularly interested in mobile programming – pop-up models that are not reliant on the national parks' hard infrastructure, which has historically been core to NatureBridge's programming. Mobile programming was not a new idea to NatureBridge. Before the fire, the organization had been in dialogue with The Nature Conservancy (TNC) about partnership opportunities for serving kids outside the national parks. After the fire, the circumstances aligned and the time was right to run a pilot program. In the spring of 2019, NatureBridge and TNC collaborated on a successful daytime program on a Southern California TNC preserve. Both organizations are now planning for additional programs in 2020, including an overnight camping program.

Looking to the future, Lin sees mobile programming as an important alternative to NatureBridge's core residential programs in the National Parks. As Lin said, "I want us to keep doing what we do well. I want us to be able to fill our capacity in the places where we already are ... Then, I would love if there are new opportunities, like mobile programming, where we could replicate and expand what we do well."

In addition to its service delivery innovations, NatureBridge's strong risk management competency is proving to be an important ingredient to its ability to respond and adapt to the many potential disruptions and threats that come with working in nature. Student safety has always been a top priority, and NatureBridge has a field risk management expert on staff to directly train and support its campuses and staff. The risk management director's role continues to expand as new kinds of risks, such as rattlesnake bites and wildfire smoke-related impacts, are becoming more prevalent. Coupled with improved technology that allows for better incident data collection and reporting, the learning the organization gains from these incidents is then codified and integrated into staff training.

The role of funders and funding

For the most part, funders have not played a major role in NatureBridge's responses to disruptions. With the fire, the organization didn't call on its funders because, as Kilbridge said, "It felt inappropriate to make a special appeal when people were losing their lives and their homes." Instead, the organization has focused on cultivating long-term relationships with funders committed to the organization's overall health. Related, funders are building the financial reserves that can help NatureBridge operate in nature with confidence and flexibility. Needless to say, building ample cushion for working in such an uncertain context isn't easy. As part of a recent strategic planning effort, leadership looked at a range of disruptive scenarios and the cash that would be needed at hand. The numbers were high. So far, the organization has been able to grow its cash reserves while improving program quality. Yet, Kilbridge conceded that it "may not be so lucky in the future."

Partnership for Public Service

Keeping people and culture at the center in turbulent times

ORGANIZATIONAL SNAPSHOT

Year founded:	2001
Annual budget (2020):	\$20.7 million
Number of employees (2020):	104
Geography served:	United States
Nature of disruption:	Political changes, industry and funding shifts
Primary resilience characteristics:	Purpose driven, open, empowered

The Partnership for Public Service is a nonpartisan nonprofit working to make the federal government more effective and efficient. Like many nonprofits, the story of the Partnership's resiliency is one of bouncing back from multiple disruptions: The organization has reshaped its funding model after losing its key donor, adapted to changes in federal government brought about by each new president's administration, and, most recently, weathered the longest government shutdown in our nation's history.

Weathering a loss

The Partnership was founded in 2001 with generous funding from Samuel J. and Ronnie F. Heyman that covered nearly all operating costs in the early years. Over time, funding sources became more diversified, including initial efforts to develop a fee-for-service revenue stream, significant programmatic support from large foundations, and a few corporate sponsors, as well as individual donors. However, the Heymans' consistent, predictable, and sizable unrestricted support was central to the Partnership's financial health. In 2009, Samuel Heyman suddenly passed away. The loss of the Partnership's most generous donor, champion, and board chair was deeply sad and destabilizing. His passing pushed the organization to step back, clarify priorities, align cost centers with these priorities, and accelerate efforts to diversify funding streams. As VP of Development Christine Carroll said, "[A significant decline in the Heymans' funding] helped us take a critical look at what we were doing and how those things actually advanced our mission."

Evolving the funding model

In 2010, the Partnership engaged in its first comprehensive strategic planning effort. As part of this process, Carroll and her team conducted a detailed review of the Partnership's brand and assets, which resulted in updating the value of and pricing for sponsored programs, as well as an opportunity to build more sustainable streams of philanthropic revenue. According to Carroll, "There was a culture shift in the organization. As the fundraiser, I had to say, 'You can't just do whatever you want to do. You have to make a case for what you're doing and how it has impact and brings value back to the funder.' It really forced the staff to think differently about their work ... and to become active fundraisers."

In addition to the heightened rigor around planning, prioritization, and pricing, communicating and reinforcing the importance of the new approach was critical to making the cultural shift stick among staff members. The fundraising team wasn't alone in maintaining this focus; the approach was also owned and consistently communicated by President and CEO Max Stier and the entire leadership team.

Around the same time, the Partnership pursued avenues through which the government could have a greater stake in programs and services offered by the organization. As part of a merger with another nonprofit, the Partnership acquired a government leadership development program and converted some of its own foundation-funded programs into successful fee-for service offerings. Since 2009, government funding has more than doubled from 23% to just over 50% of the Partnership's total revenue. Over the same time period, the organization's revenue grew from \$10 million to \$16.4 million.

Today, the Partnership is still exposed to possible financial shocks. Most notable are the uncertainty of the federal budget and the potential for government shutdowns. However, the Partnership has a sizable endowment in place, and it is building support from individuals and through multi-year unrestricted support from leading foundations.

Upholding the mission

More recently, the organization is adapting to working with federal agencies under the Trump administration. With each new administration, the Partnership must tailor its approach in response to the administration's priorities and the working style of its "new client." As a fiercely nonpartisan organization, the Partnership is well positioned to shift tactics in service of an unwavering commitment to making government better.

The advent of the Trump administration required a certain kind of resiliency and adaptation. The Partnership stepped up efforts to build trusting relationships with key administration officials and leveraged expertise to inform its positions on an array of management reforms and proposals. As a result, the organization saw many of its longstanding recommendations on the federal workforce, IT modernization, and data and transparency included in President Trump's management agenda. The Partnership continues to offer its support and assistance to ensure the effective implementation of certain proposals.

"An organization is about people, and people will perform better if they are in an environment that is supported and grown."

MAX STIER
Partnership for Public Service

The administration's focus on dramatically reducing the size and role of the federal government led to deep questioning among Partnership staff about the organization's mission to make government better. The organization supports management reforms, but some employees wondered if they should support political leaders whose actions might be contrary to the organization's values. Stier, who has served as CEO since the Partnership's founding, responded by helping staff "digest their feelings and see why our work was even more important than before." In Stier's words, "I believe in common ownership of the organization. The more I don't do, the better, in general. This was an instance where I felt that this was my job – to offer people a vision of hope and mission. The Partnership has never been about the size of the federal government. It's about effectiveness."

"This was an instance where I felt that this was my job – to offer people a vision of hope and mission."

MAX STIER
Partnership for Public Service

Creating a great place to work

Stier is not one to hide the complexity of the moment from his team. That said, in times of unusual turbulence, Stier believes it is important to "offer a vision of hope, possibility, and purpose" that is motivating for staff. Stier believes that healthy enterprises "begin with a recognition that an organization is about people, and people will perform better if they are in an environment that is supported and grown." Stier commented, "I like nice environments. I believe you get more from the honey than the vinegar ... I hire people based on their capabilities and their commitment to that kind of culture."

Alongside leadership commitment and staff fit, the Partnership emphasizes several specific practices that make the organization a great place to work:

- *Annual staff survey.* Leadership shares and discusses full results with staff. According to Stier, "The annual employee survey is often rough ... no matter what you do, someone will be unhappy, and you have to listen to it. You have to accept what's there and figure out what do about it. We take out comments about individuals, except those about me, and share the results with all staff."
- *"Stay" interviews.* In addition to conducting traditional exit interviews, leadership regularly sits down with high-performing staff who aren't leaving and explores their perceptions of how things are going – including discussing who needs support to be successful, who are the organization's stars, what issues need more attention from leadership, etc.
- *"Max Unplugged."* Individuals submit questions anonymously or directly, and Stier periodically sits down with the entire staff to address the questions.
- *"Pulse surveys."* As part of an organizational restructuring process, periodic anonymous pulse surveys were used to get a quick read on how staff are feeling about the process.
- Leaders also held town hall staff discussions and ongoing one-on-one conversations to inform and support the restructuring.

In addition, the Partnership has pioneered the “Best Places to Work in the Federal Government” rankings. Rankings are calculated by overall employee engagement at federal agencies. The Partnership uses a similar process to quantify and track the satisfaction of its own staff as a critical measure of organizational effectiveness, which leadership upholds as especially important in the absence of financial outcomes. The Partnership’s commitment to people and transparency are clear in the results. In 2018, the organization’s “Best Places to Work” score was 77 out of 100, 15 points higher than the government-wide benchmark and equal to the private sector benchmark on the same measure.

The above channels of input and engagement appear to be contributing to a healthy place to work. In addition to the positive and productive culture, Stier’s steady and collaborative leadership has, no doubt, played an important role in the organization’s ability to bounce back in times of turbulence. Reflecting on the Partnership’s resiliency, former Executive Vice President Meroe Park commented, “It’s our people and this starts with Max. We cannot undervalue the impact of a single individual, especially when you have a small organization.”

United Philanthropy Forum

Transformation fueled by disruption

ORGANIZATIONAL SNAPSHOT

Year founded:	1998; relaunched as United Philanthropy Forum in 2017
Annual budget (2020):	\$3.0 million
Number of employees (2020):	10
Geography served:	United States
Nature of disruption:	Leadership transition; loss of funding
Primary resilience characteristics:	Clear eyed, future oriented, empowered

Originally established in 1998, the Forum of Regional Associations of Grantmakers brought the nation's 33 regional philanthropy groups together for peer support and learning. In 2015 a CEO transition and shaky financial footing prompted an intentional organizational transformation. The organization relaunched in 2017 as the United Philanthropy Forum, an independent nonprofit with a broadened mandate to connect and strengthen regional and national philanthropy serving organizations (PSOs). Today, the Forum does not exist simply to serve and respond to its members; in the words of board member Janine Lee, it "stands for something." United Philanthropy Forum is making a deep commitment to racial equity and to leading change and increasing impact on other critical issues for philanthropy. The Forum "envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper." The Forum is now a vibrant network of more than 80 PSOs, representing more than 7,000 foundations and other funders, fueled by a growing annual budget and staff.

A time for reinvention

In 2015, the Forum operated with a budget of less than \$1 million and a staff of four. Over time, it became clear that the organization's value proposition and its related funding model were not sustainable. There were only a finite number of potential members (i.e., regional associations) and their dues would not support operating costs. Things came to a head when, in 2015, the CEO departed and only six months of operating funds remained in the bank. Rather than jumping into an executive search, the board used the disruption as the impetus to step back and reflect on its mission and relevance: Why do we exist? Should we exist? What is the unique role we can play? As Forum CEO Dave Biemesderfer, who was chair of the board at the time, put it, "Necessity being the mother of invention, we were on the brink and it forced us to get serious about figuring out the role of our organization."

An intentional and inclusive process for learning and planning

The board embarked on a seven-month process during which it assessed the philanthropic infrastructure landscape, addressed hard questions about the viability of the organization, and collaboratively crafted a new vision. Biemesderfer underscored the importance of taking the time to do such deep work: “Taking those seven months to do the self-reflection was vital. I see a lot of boards not wanting to do this. They kind of do it, but it’s not deep work. They want to jump into finding the CEO. It’s really important for even a healthy organization to ask, ‘Why do we exist?’ and do some really deep soul searching.”

While mapping the landscape for philanthropic infrastructure organizations (e.g., Grantmakers for Effective Organizations, ABFE, Funders Together to End Homelessness), the board soon learned that many of the national PSOs had never met each other and felt isolated in their work, and those who did know each other were not connecting and coordinating as effectively as they could and should. The Forum was well positioned to cultivate and serve this broader and more diverse audience: regional associations of grantmakers (what the Forum now calls regional PSOs) as well as national PSOs that focused on philanthropic practice, a specific population, issue, and/or type of funder. The Forum could, as Biemesderfer said, “bring all of philanthropy’s infrastructure together in a network.”

Unlike a traditional membership association that focuses on service provision, Forum members were well positioned to work together to achieve shared goals. The previous CEO had helped lay the groundwork for this transition by promoting active member engagement, peer support, shared leadership, and generally encouraging “the network to work more like a network,” according to staff member Courtney Moore.

Guided by its new North Star and its existing commitment to working “like a network,” the board embarked on a highly collaborative vision design process. “When we were beginning to develop the vision, we were very intentional in the makeup of the group so there was equal representation of regional and national groups,” recalled board member Marissa Manlove. “It wasn’t just the CEOs. We tried to get a range of staff represented.” Through the visioning process, the board was, in essence, creating the blueprint for the new organization with the very organizations it was hoping to engage and serve as future network members.

This collaborative approach paid off. By the time the organization relaunched and opened the newly expanded membership in 2017, many leaders were already deeply invested. The goal was to bring on 20 new members in the first year. Instead, the organization hit its target within a month of the relaunch.

“It’s really important for even a healthy organization to ask, ‘Why do we exist?’ and do some really deep soul searching.”

DAVE BIEMESDERFER
United Philanthropy Forum

A pivotal role for funders

It's unusual for a nonprofit of the Forum's size to be able to invest in such an in-depth visioning and planning process. The Forum was able to take the time for deep work and to engage outside help to facilitate the process because of philanthropic support. When Biemesderfer was still board chair, he met with a number of the Forum's long-time funders and openly shared the organization's current status and the need for change. He convincingly made the case for the new vision, building on qualitative and quantitative data from the landscape assessment. Biemesderfer ultimately raised \$1.5 million from seven different funders to develop and implement the Forum's new vision. According to Manlove, "Dave did a masterful job of setting the vision of what we were trying to do and the beginning ideas of what might be possible under his leadership. It grabbed the interest of some key funders. That gave us the financial underpinning to do this kind of work ... We had to have this kind of support in order to host and run all of this. Our membership dues wouldn't pay for the visioning work." Importantly, the large majority of the \$1.5 million was unrestricted support, providing the organization the flexibility needed while managing through the transition.

Leadership and organizational culture: key ingredients to managing through disruption

The board's efforts to transition the organization were significantly bolstered when board chair Dave Biemesderfer accepted the open president and CEO position as a permanent role. He had already been closely engaged in crafting the Forum's new vision and engaging funders in support of this vision. He had a long-time relationship with the organization, credibility with staff, and could hit the ground running at a pivotal moment.

Biemesderfer helped steer the organization through the period of transition by keeping the transition year goals front and center for staff and regularly updating the team on the collaborative visioning and planning process. It was especially motivating when Biemesderfer shared the encouraging feedback he was receiving from PSO leaders on the strategic shift. He also worked to cultivate a positive work culture. "Dave always wants us to take time to celebrate," said staff member Courtney Moore. "We spend time [together as a team] that's not just work – going out to lunch or we'll get together for happy hour. It's also about acknowledging when we have new people and welcoming them into the organization. And when people leave for a new opportunity, we acknowledge their contributions to the organization and say thank you. This is helpful for people coming and going, and helpful for the people who are staying."

Appendices

Resources for going deeper

Research methodology

Nonprofits interviewed and the nature of their disruptions

Acknowledgments

Endnotes

Resources for going deeper

We have assembled here a select set of resources that we found particularly helpful for understanding nonprofit organizational resilience.

"Building Resilience." Martin E.P. Seligman. *Harvard Business Review*. April 2011.

"City Resilience Framework." Arup and the Rockefeller Foundation. November 2015.

"Eight Steps for Managing Through Tough Times." Bridgespan. 2019.

Emergent Strategy. Adrienne Marie Brown. AK Press. 2017.

"How Resilience Works: Three traits of those who bounce back." Dianeoutu. Chapter in *Resilience: HBR Emotional Intelligence Series*. Harvard Business Review Press. 2017.

Ordinary Magic: Resilience in Development. Ann S. Masten. The Guilford Press. 2014.

"Resilience is About How You Recharge, Not How You Endure." Shawn Achor and Michelle Gielan. Chapter in *Resilience: HBR Emotional Intelligence Series*. Harvard Business Review Press. 2017.

Resilience: Why Things Bounce Back. Andrew Zolli and Ann Marie Healy. Free Press. 2012.

The Happy Healthy Nonprofit. Beth Kanter and Aliza Sherman. Wiley. 2017.

"The New Normal: Capacity Building During a Time of Disruption." Adene Sacks, Heather McLeod Grant, and Kate Wilkinson. Open Impact. 2018.

"Roadblock Analysis Report." Open Road Alliance. 2017. (Plus, additional resources on Open Road Alliance website: <https://openroadalliance.org/advocacy/research/>)

What If? The Art of Scenario Thinking for Nonprofits. Diana Searce, Katherine Fulton, and the Global Business Network Community. 2004.

Research methodology

This report represents the culmination of an 18-month study of what it takes to cultivate nonprofit resilience. The study focused on listening closely to a wide range of firsthand experiences of responding and adapting to significant change and uncertainty. Open-ended interviews with nearly 60 leaders of U.S.-based nonprofits served as our primary data source. Interviewees' organizations and the disruptions they experienced were intentionally varied. In addition to nonprofit leader interviews, our findings were also informed by conversations with funders and nonprofit leaders at in-person gatherings, interviews with funders and sector thought leaders, and literature review. Preliminary findings were shared, discussed, and expanded on at sector conferences, as well as gatherings organized just for the study. Approximately 150 funders and nonprofit leaders were engaged in these gatherings. In addition to nonprofit resilience and capacity building literature, we reviewed materials related to individual, community, and corporate resilience. The "Resources for Going Deeper" appendix shares literature we found especially informative.

The scope of the study was, by design, broad and exploratory. As such, the findings are a set of well-informed observations that we hope will contribute to a deeper understanding and future research into what it takes for nonprofits to survive and thrive amid disruption.

Nonprofits interviewed and the nature of their disruptions

ORGANIZATION	NATURE OF THE DISRUPTION(S)
American Civil Liberties Union	Public policy and political changes, funding shifts
Aspire Public Schools	Internal issues, leadership transitions
Audubon California	Leadership transitions, headquarter/affiliate tension
Big Brothers Big Sisters of America	Investigation, headquarter/affiliate tension, leadership transitions
Big Brothers Big Sisters of Metro Atlanta	Media attention at headquarter level, headquarter/affiliate tension
Boy Scouts of America	Media attention (negative press), investigation, headquarter/affiliate tension
BUILD	Leadership transitions, funding shifts
California Academy of Sciences	Capital project, leadership transitions
CalMatters	Scaling initiatives, industry and funding shifts
Center for Youth Wellness	Leadership transitions, public policy changes
Colorado River Sustainability Campaign	Public policy changes
Community Foundation Sonoma County	Wildfire
Community Science Workshop Network	Governance conflict, leadership transitions

ORGANIZATION	NATURE OF THE DISRUPTION(S)
Consumer Reports	Industry and demographic shifts
Dimensions Dance Theater	Funding and demographic shifts (displacement of community served)
Direct Relief	Tsunami, funding shifts (rapid growth)
ECHOS	Hurricane
First Place for Youth	Public policy changes
Goodwill Industries	Industry and demographic shifts
Guidestar (now Candid)	Media attention
HOPE Services Hawai'i, Inc.	Lava flow
Health Connected	Public policy changes, growth in demand for nonprofit services, media attention
KQED	Cyber attack
National Immigration Law Center	Public policy and political changes, funding shifts (dramatic increase)
NatureBridge	Wildfires, flood, illness
Partnership for Public Service	Political changes, industry and funding shifts
San Francisco Classical Voice	Economic shifts, leadership transitions, industry shifts
SHELTER, Inc.	Funding and economic shifts, demographic shifts (displacement of community served)
Social Advocates for Youth	Wildfire, leadership transitions, funding shifts
Sustainable Conservation	Funding shifts

ORGANIZATION	NATURE OF THE DISRUPTION(S)
Techbridge Girls	Scaling initiatives, leadership transitions, funding shifts
The Hidden Genius Project	Rapid growth
The Nature Conservancy, California Chapter	Internal issues at headquarter level
Tides	Leadership transitions, industry shifts
United Philanthropy Forum	Leadership transitions, funding shifts
Women With A Vision	Hurricane, arson
Young Women's Freedom Center	Leadership transitions, funding shifts

Acknowledgments

We are thankful for the many nonprofit leaders, funders, and advisors who generously shared their experience and expertise, and made this report possible. We are most grateful for our partnership with the S. D. Bechtel, Jr. Foundation, in particular, Barbara Kibbe and the Effectiveness team for their vision and stewardship of this project from beginning to end. In addition, we want to thank the many other S. D. Bechtel, Jr. Foundation senior leaders and staff from across the organization who contributed their insights, advice, and support throughout the project.

We have listed below, to the best of our ability, all who helped us learn about nonprofit resilience over the course of this project, including our dedicated Steering Committee members, the nonprofit leaders who shared their insight and experiences of bouncing back from disruptions, and the many other funders and advisors who contributed their perspectives and guidance.

RESILIENCY STUDY STEERING COMMITTEE MEMBERS (PHASES 1 AND 2)

Marselle Alexander-Ozinskas, Senior Program Officer, S. D. Bechtel, Jr. Foundation

Sam Cobbs, President, Tipping Point

Victoria Dunning, Program Officer, BUILD, Ford Foundation

Ashleigh Halverstadt, Senior Evaluation and Learning Officer, S. D. Bechtel, Jr. Foundation

Judy Huang, Principal, Judy Huang Consulting

Barbara Kibbe, Director, S. D. Bechtel, Jr. Foundation

Matthew La Rocque, Program Officer, S. D. Bechtel, Jr. Foundation

Janine Lee, President and CEO, Southeastern Council of Foundations

Ruth Norris, Advisor

Bob Tobin, Senior Consultant and President, Williams Group

Jennifer Wei, Organizational Effectiveness Officer, Hewlett Foundation

INTERVIEWEES AND ADVISORS

Marisa Aguayo, Senior Officer, Institutional Giving, National Immigration Law Center
Linda Baker, Organizational Effectiveness Director, David and Lucile Packard Foundation
Mala Batra, CEO, Aspire Public Schools
Liz Bender, Former Chief Finance and Growth Officer, First Place for Youth
David Biemesderfer, President and CEO, United Philanthropy Forum
Ashley Boren, Executive Director, Sustainable Conservation
Elizabeth Brown, President and CEO, Community Foundation Sonoma County
Claudia Campazzo, Managing Director, San Francisco Classical Voice
Christine Carroll, Vice President of Development, Partnership for Public Service
Megan Colnar, Strategy and Impact Director, Open Society Foundations
Kriss Deiglmeier, Former CEO, Tides
Adela de la Torre, Former Communications Director, National Immigration Law Center
John Eckstrom, CEO, SHELTER, Inc.
Joel Fleishman, Board Member, Partnership for Public Service
Jessica Freireich, Managing Director, Rockefeller Foundation
Katherine Fulton, Advisor
Carla Ganiel, Organizational Learning Officer, William and Flora Hewlett Foundation
Rebecca Goldberg, Senior Program Officer, S. D. Bechtel, Jr. Foundation
Elizabeth Goldman, Interim CEO and Chief Program Officer, Social Advocates for Youth
Karen Goldman, Director of Foundation Relations, American Civil Liberties Union
Heather Grant, Co-founder and Managing Director, Open Impact
Jacob Harold, Executive Vice President, Candid
Deon Haywood, Executive Director, Women With A Vision
Meghan Hertel, Director of Land and Water Conservation, Audubon California
Jim Hickman, CEO, Center for Youth Wellness
Marielena Hincapié, Executive Director, National Immigration Law Center
Alex Hooker, Senior Program Officer, S. D. Bechtel, Jr. Foundation
Pam Iorio, President and CEO, Big Brothers Big Sisters of America
Byron Johnson, Capacity Building Initiative Officer, East Bay Community Foundation
Milicent Johnson, Advisor
Tom Kam, COO, National Immigration Law Center
Abi Karlin-Resnick, Executive Director, Health Connected
Patrick Kenani, Program Assistant, Ford Foundation
Philip Kilbridge, President and CEO, NatureBridge
Steven LaFrance, Founder and President, Learning for Action
Judy Lin, COO, NatureBridge

INTERVIEWEES AND ADVISORS (CONTINUED)

Amy Luttrell, Board Chair, Goodwill Industries International
Marissa Manlove, Former Board Chair, United Philanthropy Forum
Dan Mansergh, Former CTO, KQED
Suzanne McKechnie Klahr, Founder, BUILD
Janice McKenzie-Crayton, Former President and CEO, Big Brothers Big Sisters of Metro Atlanta
Brandee Menino, CEO, HOPE Services Hawai'i, Inc.
Anupam Mishra, Chief People Officer, Aspire Public Schools
Cathy Moore, Executive Director, ECHOS
Courtney Moore, Associate Director of Member Services, United Philanthropy Forum
Maitri Morarji, Director of Programs, Foundation for a Just Society
Paula Morris, Director, Resilience Initiative
Megan Morrison, Strategy and Learning Officer, Ford Foundation
Brandon Nicholson, Executive Director, The Hidden Genius Project
Jessica Nowlan, Executive Director, Young Women's Freedom Center
Darryl Oliviera, Risk Management Director, HPM Building Supply
Meroe Park, Former Executive Vice President, Partnership for Public Service
Marcia Parker, Publisher, CalMatters
Cristina Parnetti, Director of Knowledge, Open Society Foundations
Gaylon Parsons, Deputy Director, Audubon California
Anisa Rasheed, Board President, Dimensions Dance Theater
Kathy Reich, Director, BUILD, Ford Foundation
Julia Ritchie, Principal, Julia Ritchie Consulting
Sarah Rose, Executive Director, Audubon California
Pamela Sergio, Director of HR and Administration, Sustainable Conservation
Max Stier, President and CEO, Partnership for Public Service
Stephanie Stone, Director of Communications and Content, California Academy of Sciences
Jasmine Sudarkasa, Program Fellow, William and Flora Hewlett Foundation
Mike Surbaugh, Former Chief Scout Executive, Boy Scouts of America
Mike Sweeney, California Executive Director, The Nature Conservancy
Shar Taylor, Vice President and Chief Social Impact Officer, Consumer Reports
Marta Tellado, President and CEO, Consumer Reports
Thomas Tighe, President and CEO, Direct Relief
Sam Tucker, Director, Colorado River Sustainability Campaign
Parker Thomas, Board Member, Community Science Workshop Network
Jerry Valadez, CEO, Community Science Workshop Network
Chris Van Bergeijk, Senior Vice President and Chief Impact Officer, Hawai'i Community Foundation

INTERVIEWEES AND ADVISORS (CONTINUED)

Belen Vargas, Vice-President, Programs, Weingart Foundation

Deborah Vaughan, Artistic Director, Dimensions Dance Theater

Leonora Wiener, Senior Vice President and COO, Consumer Reports

Mark Wier, Chief Development Officer, American Civil Liberties Union

Linda Wood, Senior Director, Evelyn and Walter Haas Jr. Fund

Irene Wong, Local Grantmaking Director, David and Lucile Packard Foundation

This report was brought to life with the editorial and creative talent of the Williams Group team, Emily Shepherd of The Graphic Distillery, Inc., and editor Jenny Johnston.

Endnotes

- 1 Adene Sacks, Heather McLeod Grant, and Kate Wilkinson, "The New Normal: Capacity Building During a Time of Disruption," Open Impact, 2018.
- 2 NOAA National Centers for Environmental Information (NCEI), "U.S. Billion-Dollar Weather and Climate Disasters," DOI: [10.25921/stkw-7w73](https://doi.org/10.25921/stkw-7w73), 2020.
- 3 Adeel Hassan, "Hate-Crime Violence Hits 16-Year High, F.B.I. Reports," *The New York Times*, November 12, 2019.
- 4 Ted Hebert, "The Biggest Cyber Attacks of 2019 and What's Ahead for 2020," GlobalSign Blog, November 18, 2019.
- 5 Anthony Cilluffo and D'vera Cohn, "6 Demographic Trends Shaping the U.S. and the World in 2019," *Pew Research Center*, April 11, 2019.
- 6 While 40% of Americans are people of color, only 10% of grants from U.S. foundations are designed to support these communities. (Mike Anft, "Inching Toward Equity," *The Chronicle of Philanthropy*, January 7, 2020.)
- 7 Eden Stiffman and Emily Haynes, "Anxiety in Times of Plenty," *The Chronicle of Philanthropy*, November 5, 2019.
- 8 The 56 nonprofit leaders represented 37 different organizations. Approximately a third of the nonprofits interviewed were small (budgets below \$5 million), a third medium sized (budgets of \$5 million–25 million), and a third large (budgets above \$25 million). Some were advocacy organizations, while others worked in direct services. Their programmatic issue focus varied as well, from youth development to human rights to media. Their reach encompassed local, state, national, and global levels. Funders were engaged in the study through formal interviews and convenings to share and make sense of interim findings.
- 9 Andrew Zolli and Ann Marie Healy, *Resilience: Why Things Bounce Back*, Free Press, 2012.
- 10 Rebecca Coker, Neela Pal, and Miguel Salinas, "Building Financially Resilient Nonprofits: Lessons from the Field," *Stanford Social Innovation Review*, November 16, 2018. Also see the Nonprofit Finance Fund and Philanthropy California's work on what it takes to cover the full cost of delivering outcomes: <https://www.philanthropyca.org/full-cost-project>.
- 11 Diane Coutu, "How Resilience Works: Three Traits of Those Who Bounce Back," *Resilience: HBR Emotional Intelligence Series*, 2017.
- 12 The Penn Resiliency Program found that about a third of individuals and animals who experience inescapable shocks never become helpless due to their optimism. They experience setbacks as temporary. Similarly, psychologist Shawn Achor writes of the "happiness advantage." According to Achor, "People who cultivate a positive mindset perform better in the face of challenge. I call this the 'happiness advantage' – every business outcome shows improvement when the brain is positive." (Shawn Achor, "Positive Intelligence," *Harvard Business Review*, January – February 2012.)
- 13 Jim Collins, *Good to Great: Why Some Companies Make the Leap and Others Don't*, HarperBusiness, 2001.
- 14 Diane Coutu, "How Resilience Works: Three Traits of Those Who Bounce Back," *Resilience: HBR Emotional Intelligence Series*, 2017.
- 15 Ian Turner, "Corporate Failure," *Henley Manager Update*, Vol. 17 No. 2 Winter 2005.
- 16 Diana Searce and Katherine Fulton, *What If? The Art of Scenario Thinking for Nonprofits*, Global Business Network, 2004.
- 17 Jon Brooks, "The Crippling Ransomware Attack on a San Francisco NPR Member Station," KQED, October 31, 2017.
- 18 Shawn Achor and Michelle Geilan, "Resilience is about how you recharge, not how you endure," *Resilience: HBR Emotional Intelligence Series*, 2017.
- 19 Nicole Wallace, "Leaders of Color Speak Out," *The Chronicle of Philanthropy*, July 9, 2019.
- 20 "INN Index 2019: The state of nonprofit news," Institute for Nonprofit News.

-
- 21 Efforts to grow funding for nonprofit news organizations have been led by the John S. and James L. Knight Foundation, and others like Catherine T. MacArthur Foundation, Ethics in Journalism Foundation, Jonathan Logan Family Foundation, and Democracy Fund.
 - 22 Sam Lefebvre, "It's Criminal': Cultural Funding Cuts Frustrate Oakland Artists," KQED, July 11, 2019.
 - 23 HOPE Services would like to acknowledge the efforts of Gilbert Aguinaldo and Bronson Haunga who played critical roles on the micro-shelter project from the start to finish.
 - 24 The huge response and influx of donations to National Immigration Law Center was due, in part, to NILC being included on a list published by *Jezebel* of pro-women, pro-immigrant organizations that readers looking to take action could send a donation. The American Civil Liberties Union and Planned Parenthood were also on the list.

A VISION FOR CALIFORNIA

The S. D. Bechtel, Jr. Foundation envisions a productive, vibrant, and sustainable California that is a model of success and a source of innovation.

DIANA SCEARCE

Diana Searce is an independent consultant who has dedicated her career to helping social changemakers increase effectiveness and impact, in the U.S. and around the world. Diana's consulting practice focuses on strategy, learning, and collaboration. Her prior positions include director of learning and evaluation at the Skoll Global Threats Fund, director of evaluation and learning at the David and Lucile Packard Foundation, and director at the Monitor Institute.

JUNE WANG

June Wang, of [CHANGE/D Consulting](#), helps social sector organizations leverage data and experience to improve practices. As an experienced organizational leader, facilitator, and project manager, June currently serves on the board of Fresh Lifelines for Youth (FLY) and as the senior portfolio director with Listen for Good. She was previously the organizational learning officer at The William and Flora Hewlett Foundation.

This work is licensed under the Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License.

To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc-sa/4.0/> or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA.

Recommended Citation

Searce, Diana and Wang, June (2020) "Resilience at Work: How Nonprofits Adapt to Disruption. How Funders Help." doi.org/10.15868/socialsector.36542