







# **FIVE GOOD IDEAS**

**PRACTICAL STRATEGIES FOR  
NON-PROFIT SUCCESS**

*Edited by* ALAN BROADBENT *and* RATNA OMIIDVAR

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# CONTENTS

Foreword by *Craig Kielburger* / vii

Introduction by *Alan Broadbent* / xi

## 1 Leadership and Vision

Reimagining Your Organization · NICK SAUL / 3

Leadership · ROCCO ROSSI / 10

Institutional Change · ALOK MUKHERJEE / 16

Influencing Change · JOHN OESCH / 23

Strategic Planning · JAMES APPLEYARD / 27

Turning Your Organization Around · PAUL DAVIDSON / 33

Innovation · SUZANNE GIBSON / 38

## 2 Organizational Effectiveness

Leading an Inclusive Organization · KAY BLAIR / 45

Shared Services · SHARON B. COHEN / 49

Managing Risk · DEREK BALLANTYNE / 53

Not-for-Profit Corporations Law · SHEILA CRUMMEY / 59

Dealing with a Large-Scale Emergency · THOMAS APPLEYARD / 66

## 3 Human Resources

Effective HR Management · LYNNE TOUPIN / 77

Improving Employment Relations · DAVE MCKECHNIE / 84

Managing Union Relations · FRANCES LANKIN / 91

Working with Volunteers · GAIL NYBERG / 97

Managing Consultant Relationships · DAVID PECAUT / 102

## **4 Resource Development**

Financial Management · LOIS FINE / 111

Translating Vision into Funding · PAUL BORN / 118

Approaching Grantmakers Successfully · ROBIN CARDOZO / 122

Corporate Fundraising · SUSAN MCISAAC / 127

Fundraising for Small and Medium-sized

Organizations · ROSS MCGREGOR / 132

Developing Resources Through Partnerships · HELEN WALSH / 138

## **5 Communications**

Branding · IAN CHAMANDY & KEN ABER / 147

Strategic Communications · JENNIFER LYNN / 153

Maximized Marketing for Non-Profits · DONNIE CLAUDINO / 157

Social Marketing · MARK SARNER / 162

Talking to the Media · CAROL GOAR / 167

Web 2.0 · JASON MOGUS / 175

Building Conversations on the Web ·

MARCO CAMPANA & CHRISTOPHER WULFF / 183

Successful Networking · LISA MATTAM / 190

## **6 Advocacy and Policy**

Government Relations · JUDY PFEIFER / 197

Advocacy · SEAN MOORE / 204

Working with Government Budgets · DAN BURNS / 212

Impacting Public Policy · BENJAMIN PERRIN / 218

## **7 Governance**

Managing Board–Executive Director

Relationships · RICK POWERS / 227

Board Governance · TOM WILLIAMS / 232

Diversifying your Board · MAYTREE / 237

Acknowledgements / 247

The Editors / 248

## FOREWORD

by Craig Kielburger

I STILL remember the April morning in 1995 when I stood nervously in front of my Grade 7 class holding a crumpled newspaper article about child labour.

‘I don’t know what, but we have to do something,’ I said. ‘Who will join?’ Eleven hands shot up. Free The Children was born.

I’ve found in retelling this story that it’s usually the ‘Who will join?’ part and the 11 hands that grab people’s attention. But when I look back, what strikes me most is the first half of my statement: I meant it when I said I didn’t know what to do. I wasn’t out to start a charity – none of us were. Heck, we hadn’t yet tackled high school math, let alone finance, international development and selecting a board of directors. We just wanted to help.

After our initial enthusiasm, few opportunities emerged for us young people to get involved beyond handing over our parents’ credit cards. So we started Free The Children and led ourselves straight up a steep learning curve. In retrospect, it felt more like a learning *cliff*.

The cliffs that exist within the non-profit world can often seem insurmountable. In a sector that relies largely on pro bono work, donations and sheer passion, you’re expected to take on a lot of tasks corporations would normally hire out. But once you overcome the initial fear, the incredible part of the non-profit sector emerges – the part with the wealth of brilliant minds and innovative thinkers willing to give you a boost.

Looking back, our little group had an advantage in being so young. It was natural that we asked for help – that’s what we did in class. More than that, the experts we contacted didn’t expect us to have all the answers. They appreciated our eagerness to learn, and that increased their willingness to teach.

Aside from experts, we also received advice from the people in our communities around the world – the very people we were trying to help. By listening to them, we learned one of our first lessons in influencing change.

After finally raising enough money to build our first school in Kenya, we were ecstatic when the walls went up. But that excitement turned to disappointment when we saw a problem – no girls came to the newly built classroom. Searching for a solution, we looked to the community elders. They explained that the lack of girls had nothing to do with culture. It’s just that young women didn’t have time for school when they needed to collect water.

That statement was the first part of a long lesson. We weren’t development specialists, but we learned from our conversation that we couldn’t lift people out of poverty – we had to help them lift themselves.

Slowly we broadened our scope. Wells became the second phase of our plan. Phase two turned into three and then four as health care and alternative income became clear necessities in achieving sustainability. That became the basis of our Adopt a Village model, which is now active in hundreds of communities in seven countries.

As our organization grew, we saw the value of the knowledge others in our field were gaining. We were inspired by innovative groups like Stephen Lewis’s Grandmothers to Grandmothers campaign and Zainab Salbi’s Women for Women International, which looked beyond high-net-worth donors to facets of our society that wanted to help but weren’t traditionally targeted. These markets can be powerful. Today, about 55 percent of Free The Children’s funding comes from youth.

Once we recognized the power of young people, we wanted others to see it too. That desire became the basis for We Day, an annual event that brings 70,000 young people together in five stadiums across Canada to celebrate the work they’ve done and learn how they can continue

making a difference. This free event is broadcast as a prime-time CTV special. To get tickets, youth are required to take one local and one global action.

As a result, young We Day participants annually log over 1 million volunteer hours and raise millions of dollars for more than 500 charities across the country. Instead of competing with other non-profits, this event has allowed us to encourage the growth of the next generation of philanthropists supporting a spectrum of causes.

These young people have us excited about what's to come.

We're beginning to see an incredible shift in focus, with the non-profit sector embracing social enterprise. For too long, charities have competed for the same 5 to 10 percent – that's the portion of income or time the average person can donate to charity. In young people especially, we see a desire to have a positive impact with the other 90 to 95 percent of our income and time – what we eat, what we wear and how we spend money.

One of the people leading this emerging field of social enterprise is Jeff Skoll, the founding president of eBay. When the Canadian businessman left the internet behemoth, he started seeking out other vehicles for change. He founded a film company called Participant Media to make movies with a message, and scored big with Al Gore's *An Inconvenient Truth*.

With the mentorship of Jeff and other innovators, we were able to form Me to We, a Canadian social enterprise that provides consumers with sweatshop-free organic clothes, socially conscious books, volunteer trips and youth-leadership training experiences. These choices and programs give people the opportunity to create change every day. With half of Me to We's profits donated to Free The Children and the other half reinvested into the social enterprise to continue its growth, we can ensure that the bottom line is measured not in dollars earned, but instead in the positive social impact we make.

I think of this book much like the early advisors and mentors who fostered Free The Children and Me to We's development. The success of everyone in the non-profit world and the emerging social-enterprise sector is dependent on the sharing of information, ideas and experiences.

Both this book and the Maytree lunch-and-learn program provide an important exchange of ideas to guide us as we collectively embark up another steep learning curve.

This knowledge is not meant to help any one group – it's about strengthening the whole. By collecting the expertise of people who have forged this trail before us, we can set about scaling new cliffs and bettering the world.

## INTRODUCTION

*by Alan Broadbent*

**GOOD MANAGEMENT** is based on the ability to put good ideas into action. Whether one is running a business, a community organization, a government department, a school or a hospital, putting good ideas into action is critical to success.

The idea for this book arose in 2003 when I returned from a two-day conference and compared notes with my colleague Ratna Omidvar, Maytree president, who had returned from a similar conference. Asking our usual question of each other – ‘Did you learn anything useful for our work?’ – we ascertained that my conference, unfortunately, had produced a rather low yield, one middling idea, and hers had produced two. We then began to wonder if taking time to attend conferences was worth it.

Of course, there are benefits to conferences that have more to do with networking and relationships than content, but when we attend conferences for two or three days, the volume of work crossing our desks doesn’t abate. When we’re back in the office, we face today’s work, plus that of the days we missed.

Admittedly, we were both feeling a little conference – and road – weary.

So we began to imagine how great it would be to obtain the benefits of a conference without having to actually attend. And if we could do that, how about striving for multiple benefits? Instead of getting one good idea in two days, how about getting two in one day? Heavens, why stop there – how about five good ideas over lunch? At that moment, we stopped, looked at each other and launched the Five Good Ideas series.

Over the past eight years, Maytree has hosted lunch-and-learn sessions on a wide range of management-related topics. The topics result from our ongoing canvass of people working in community-sector organizations. We ask them a simple question: what do you need to know to help you run your organization better? Some of the answers are obvious, like fundraising, information technology and governance. Others are less so, like managing in a unionized environment, branding and planning for emergencies such as an epidemic or earthquake.

The formula is simple. We ask leading experts and practitioners in each topic area to make a presentation. They do it with enthusiasm and without compensation, and we make them work! Rather than give a ‘canned’ presentation, we ask that they frame their advice as Five Good Ideas they feel will make people think and act better. We don’t want a survey course on, say, fundraising; rather, we are looking for those Five Good Ideas that people can take back to the office, share with colleagues and apply to their work. (We’ve been asked why we don’t call them Five Great Ideas, because many of them clearly are great ideas, but we had a little modesty spasm and opted for understatement.)

At each session, the presenter speaks for 20 minutes, after which the participants (seated at round tables of about ten people) discuss the topic for another 20 minutes. This lively discussion also serves as a networking opportunity that often connects the most unlikely partners, and is followed by a chance for participants to question, challenge or seek clarification from the speaker, as well as share their own experience on the topic.

Five Good Ideas is an inexpensive program for Maytree to run. We rent Elmsley Hall on the University of Toronto campus, which has a wall of windows giving on to a lovely terrace garden, beautiful all year round. We provide a bag lunch of a sandwich, an apple and a drink, and request that people RSVP, but we do not charge a fee. We record the session and place a summary with video on the Maytree website (<http://www.maytree.com>) for those who may have missed the session or wish to share or revisit it.

We have had people from many parts of the community sector attend, usually 80 to 100 per session. While our initial target audience was from Maytree’s granting cohort in the anti-poverty and immigrant and refugee settlement fields, it quickly grew beyond that to include

people from all kinds of community organizations, including the arts, health care and education, sports and recreation, and many other areas. We even attract people from the business and political communities.

Good management is important everywhere. But it is especially important in the community sector, which operates with much complexity, often high stress and few resources. The sector is thinly managed, so the people who are there have to be good at many things – and good pretty well all the time. Community-sector leaders must wear a variety of hats, as their organizations don't enjoy the luxury of many specialized management positions.

At Maytree we have a great respect for how well the sector is managed, particularly under constrained circumstances. We are also aware of the high degree of innovation in the sector, often a result of necessity. Five Good Ideas is a way for sector leaders to begin to think about the important elements of the range of skills they must perform. They rarely have the luxury of time to dive deeply into each area, but they can be well-served by being exposed to what some of the best thinkers and practitioners consider the top ideas. The Five Good Ideas.



# 1

## LEADERSHIP AND VISION

SUCCESSFULLY REIMAGINING a non-profit organization isn't simple. Part determination, part optimism and part good fortune, the process requires a great board and staff, a lot of strategic listening, a willingness to take risks, and relentless incrementalism – for all change takes time.

– Nick Saul





# REIMAGINING YOUR ORGANIZATION

*Nick Saul*

**1**

Listen

**2**

Create a plan (but don't  
always stick to it)

**3**

Embrace your inner  
entrepreneur

**4**

Remember: it's competitive  
out there

**5**

Contribute to public policy  
conversations; don't get  
swallowed up by service delivery

**SUCCESSFULLY REIMAGINING A** non-profit organization isn't simple. Part determination, part optimism and part good fortune, the process requires a great board and staff, a lot of strategic listening, a willingness to take risks, and relentless incrementalism – for all change takes time.

When I arrived at The Stop in 1998, it was a straightforward food bank: three staff members in a small space, a few programs and a very modest budget. Today we're a full-fledged community food centre with 35 to 40 staff, two locations, multiple programs and a budget ten times what it once was.

There was no silver bullet, no 'miracle grow' that got us there. But there are some ideas we've refined along the way that help articulate our approach to change.

## **1 Listen**

It sounds obvious, but it isn't easy to pull off. Listening isn't just a matter of sending out feelers once every four years when you put together a strategic plan: it needs to be habitual, part of your organizational DNA. You listen to be relevant and responsive, and also because it demonstrates that you value people and their ideas, that members of your community have something to say and that you're willing to listen. Organizations that listen well feel and look very different than those that don't.

At the beginning of The Stop's reinvention we did a lot of listening: to partner organizations, funders, staff and – most importantly – the community, the people who walked through our doors on a regular basis. Since then we've held community dinners, hosted impromptu town

### **Creating The Stop's Plan**

When we reached out to the community, we heard that food banks simply aren't enough, and so we focused our efforts on using food to build health, community, environmental sustainability and greater equity. We listened to gain a better sense of our goal (to provide a more comprehensive approach to food security) and then evaluated various programs and strategies to determine how we could pursue that goal most effectively.

halls, issued an annual survey, conducted focused conversations with community leaders and noted the day-to-day feedback staff receive as they deliver services.

That last point is essential: staff need to be open to hearing both the good and the bad, and have mechanisms for relaying that feedback to the organizational leadership – through staff meetings, reports, logs, year-end program evaluations and so on. Pay particular attention to your team's own feedback as well. Create space for the generation of new ideas and for discussion: encourage staff to walk into your office, take time to solicit comments at staff meetings, make an open-ended conversation part of your annual board-staff retreat. Good ideas are lurking everywhere.

Still, not every idea is a good one; as a leader you need a plan, something that will filter and rein in the many suggestions that are out there. Which brings us to . . .

## **2 Create a plan (but don't always stick to it)**

Listening followed up with honest evaluation is what produces a plan. A SWOT analysis (strengths, weaknesses, opportunities, threats) of all the feedback and ideas you receive will help you create a roadmap that is clear – for both internal and external purposes – about your goals and the initiatives that will best help you meet them.

Make your plan fairly broad, because you'll need room to manoeuvre, to tweak and refine your implementation, within the broad aims that you set. Also, remember that plans are important, but they are never

perfect: a plan is always a work in progress. Don't get so caught up in making your plan that you stall before taking action, and don't let the perfect be the enemy of the good.

Your plan needs to be *yours* – this is one thing you cannot outsource. While you might hire an outside consultant to help facilitate your planning process, at the end of the day you need to write your plan yourself and fully own it. Because your plan will inform your organization's entire development, this is one area you really want to micromanage. And once your plan is written, make it public. It'll help clarify your activities for your stakeholders and community members. (I am always surprised at how few organizations do this.)

When you start to implement your plan, something interesting is going to happen: you'll start to say no to things and feel good about that, because you'll know *why* you're saying no. You'll have clarity of purpose and direction, and that will enable you to make smart choices.

### **3 Embrace your inner entrepreneur**

Non-profits need to be as opportunistic and nimble as possible: the landscape in which you are delivering services can shift quickly, and unforeseen opportunities will arise. You must be willing to be bold and think big.

*Non-profits  
need to be as  
opportunistic  
and nimble  
as possible.*

At The Stop, our biggest moment of boldness came with the investment in the Green Barn: a full-service food facility that includes a greenhouse, kitchen, classroom and office space. We recognized that it was a calculated risk, but we embraced it—we did our homework and concluded that the Green Barn was an incredible opportunity, one we couldn't afford to miss. It was too good a chance to put our food work on the map and to create a bigger platform to tell our story. We felt strongly that it would attract the attention, people and resources required to pull it off.

Key to making the decision – and raising the \$5 million we needed – was a keen understanding of the cultural context in which we were

operating. The good-food revolution was on, and people were starting to think and ask questions about food like never before. This was one entrepreneurial element: recognizing that the conditions were ripe for the acceptance of our project.

The heightened awareness around food has also helped fuel our social enterprise initiatives, enabling us to reach into wealthier communities through our dinners, cookbook, farmers' market and catering. Along with raising our profile, most of this activity is focused on generating our own funds and then driving them back into our mission.

A spur to our entrepreneurialism has also been our funding model, which is largely based on private donations. This leaves us little choice but to always be in action mode, finding new ways to come at issues, get our story out, reach for new audiences. While I think you need a good balance between government funding (which is stable but prescriptive, since money is often earmarked for specific programs) and private support (which can be fickle but often flexible), the private element is important and has been essential to The Stop's innovation and growth.

## **4 Remember: it's competitive out there**

This is perhaps the elephant in the room. Obviously you never want to run another organization down, and you should always give kudos where they are due, but you must also be able to differentiate yourself from others, be clear about the difference your organization is making and why you have no equals in the pursuit of your mission.

It isn't just a question of having solid programming – you must then be good at telling your story, and feel comfortable 'selling' what you do.

One important aspect of this: you need to be known. There are many people who have the capacity to help your organization, but they need to be familiar with it first. It's imperative to get out from behind your desk, and you should schedule this time. When the Rotary Club, local church or local cable station ask you to speak – speak! And if they don't ask, tell them why you'd be a great person to invite.

Be relentless in seeking out fundraising opportunities. Create a good database to track donations, research potential contributors and make sure your organization looks and sounds professional so you can appeal

to them convincingly. Hire a photographer; write polished copy; use newsletters and annual reports to communicate your successes; engage your community via social media. Your approach to these details matters.

And before you're left with the impression that I am a craven capitalist, I'll get to my final point . . .

## **5** **Contribute to public policy conversations; don't get swallowed up by service delivery**

We're all in the non-profit sector to change the social goal posts, to create a more progressive and equitable world. We therefore need to address the systemic changes that must take place to bring this about. After all, social change can't happen within the confines of a single organization.

Hire active, politically minded staff, and populate your board with people who share your values and an interest in creating greater equity. Create time for your staff to be involved in community groups, networks

and coalitions. In your communications, always link your front-line experiences to broader social challenges in order to illustrate what needs changing. Most importantly, support your community's efforts to speak out on the issues that matter most to it.

Don't be scared of advocacy. It doesn't turn people off; rather, it makes you relevant. Obviously you need to be strategic about the way you advocate—

you certainly don't want to be shrill or partisan. But engaging with public policy helps create a culture in which your organization sees itself—and is seen by others—as part of larger-scale solutions, and not just operating within the confines of a specific community.

*Support your  
community's efforts  
to speak out on the  
issues that matter  
most to it.*



## FIVE GOOD RESOURCES

1. Anything by urban visionary Jane Jacobs or by master listener Studs Terkel, best known for his oral histories such as *Hard Times: An Oral History of the Great Depression* (Pantheon, 1986).
2. Carve out some time to recharge your batteries by watching the innovative people and big ideas at TED Talks: <http://www.ted.com/talks>.
3. <http://www.grassrootsfundraising.org> and <http://www.charityinfo.ca> for good tips and straightforward advice on fundraising and communication.
4. Every organization needs a compass for its work. Janet Poppendieck's *Sweet Charity? Emergency Food and the End of Entitlement* (Penguin, 1998) has helped guide my own work.
5. *Norma Rae*, starring Sally Field (1979). It's an inspiring movie about drawing a line in the sand and standing up for what you believe in.

As executive director of The Stop Community Food Centre for many years, **NICK SAUL** has built the organization into an international leader in the fight to eradicate hunger and to create healthier, self-sufficient and sustainable communities. He and Stop staff have pioneered an innovative new model in the community food centre, where healthy food and universal access to it is seen not as a privilege but as a basic human right. Nick is currently working on the development of a new umbrella organization to promote the resourcing and development of new community food centres in Canada. He has also worked at several other non-profits, in government and in the labour movement. Nick is a Queen's Golden Jubilee Medal winner for significant contribution to Canada and community (2002), the recipient of the Jane Jacobs Prize (2008) and the proud father of two young boys.



# LEADERSHIP

*Rocco Rossi*

- 1** Focus on the journey,  
not the destination
- 2** A journey of a thousand kilometres  
begins with one step
- 3** We need to let go of excess  
baggage in our lives
- 4** Never underestimate the generosity  
of other people nor the pleasure  
of providing service to others
- 5** Being alone is not the same  
as being lonely

**GIVE YOURSELF PERMISSION** to be selfish. I believe, deeply, that if you're going to renew yourself as a leader and have the energy you need to lead people in your organization, you have to be selfish. It's much like when you're in an airplane and the flight attendant says, 'In case of depressurization, an oxygen mask will drop down. Make sure you reach for the oxygen and put your own mask on before attempting to help others.'

All of us, in one way or another, are searching for our source of oxygen.

The need for renewal among leaders is more pressing today than at any other time in history because of the accelerating pace of change, which is putting great pressures on both material and human capacities in all segments of society. We all need more oxygen.

I have been in a hurry from the time I was born. I was in a hurry to get through school, to become a vp, to buy the biggest house and the best car I could. I was fortunate, and things came my way. I was able to transfer academic success into business success. I thought that I pretty much had it made. I possessed all of the things I was supposed to have at a very young age. But then I got a huge wake-up call.

I was at Labatt's at the time, working as senior vice-president. The CEO, Don Kitchen, and I were visiting our board in Belgium, as the company was about to go public. We had put some pieces in place that made that change possible, decisions that would make all of us very wealthy—you can imagine the huge celebration.

We were to have breakfast the next morning, but Don died in his sleep of a massive coronary, at age 44. The very first event in the house that he and his wife, Linda, had spent two and a half years renovating was his wake.

I found myself incapable of staying at my job, but I wasn't sure what I would do next. After some travelling, and another work stint that

proved dispiriting, I went on what I think of as my real-life MBA: I walked the Camino de Santiago in Spain.

The Camino is a Christian pilgrimage that was established in the mid-800s when a hermit discovered the remains of St. James the Greater, an apostle of Christ and the first to be martyred. St. James had been beheaded and his body, legend has it, was spirited away to Spain and found by this hermit in Santiago.

The Camino journey can start in different parts of Europe; I decided to do the Camino Francés, which is the route inside Spain. You stay in monasteries and church basements and hostels along the way, and meet the most extraordinary people. Most importantly, there is a chance to reflect in silence and quiet – something that, as a society, we have few opportunities to do.

Out of this experience, I distilled some ideas.

## **1** Focus on the journey, not the destination

When you make the pilgrimage to Rome or to Jerusalem, it's all about the destination: walking in the footsteps of Christ along the Via Dolorosa, seeing where the martyrs are buried in St. Peter's. The Camino de Santiago, by contrast, is about the time you spend along the way – what matters are the thoughts, development, prayers, laughter, crying and the rest that you do on the journey. In this sense, the Camino is similar to what we do each and every day in our work.

The one person who put this into stark relief for me was a fellow pilgrim named Jesús, a youth counsellor from Malaga. He had spent the better part of 18 years, day in and day out, counselling at-risk youth who had abused substances, abused others or been abused themselves. And then he woke up one day and realized he couldn't solve the problems of every youth in Malaga. He was overwhelmed, despairing. He couldn't do his job anymore.

It was amazing to meet Jesús 500 kilometres later in another town – ready to go back to Malaga. He had come to realize the power of those he had reached and saved, and this helped to renew his energy as a leader.

Large goals are important – they're necessary for forward motion – but they cannot overwhelm the experience of what you are doing on a day-to-day basis, or the value of what you accomplish in those days.

## **2** A journey of a thousand kilometres begins with one step

It's an old cliché, and it's a cliché for a reason: there is a powerful truth to it. It's good to have ambitions, but it is also easy to be overwhelmed by them. When we take a problem or mission and break it down into individual steps, it is incredible what we can and do achieve.

Nine hundred kilometres is roughly the distance between Toronto and Quebec City. If any one of us were to turn to our friends or family and say, 'Well, I'm just going for a walk to Quebec City,' they'd think we were nuts. People don't walk to Quebec City – they take a plane, a train or a car. And yet, the walk can be achieved – step by step by step. Break down those problems, goals and challenges into manageable portions.

## **3** We need to let go of excess baggage in our lives

The third idea is drawn from two key symbols on the Camino: the backpack and stones.

Each and every night, a pilgrim finds herself going through a reassessment of what is in her backpack to determine what is actually necessary for the journey, and what she can do without. Along the Camino there are piles of discarded clothing, left by people deciding, 'I don't need that fourth shirt. I don't need that sixth pair of pants. I really don't want any excess weight because that is not going to help me get where I want to go. In fact, it's causing my blisters, it's causing my pain.' We carry a lot of literal and metaphorical baggage with us, and it causes us pain.

Beyond the backpack is the story of the stones. Two-thirds of the way across the Camino there is a wonderful place called the Cruz de Ferro, which is a large iron cross at the top of a hill. At the base of the cross is a massive cairn of pebbles and stones: 30 feet in diameter, 20 feet high, literally millions of rocks that vary in size from the tip of your pinky to four and five pounds. Each of these pebbles and stones has been carried by a pilgrim, in some cases hundreds or thousands of kilometres. During the walk, pilgrims consider the mental baggage they are carrying: some have painful childhood memories, others have moments of harshness, some are burdened by acts of their own, others by words said

by another. Pilgrims spend the time leading up to the Cruz de Ferro working that pain into the stone, and at the cross they drop their stone, leaving their pain with it.

Each of us must learn to let go of excess baggage, both mental and material, because it detracts from the energy we need in order to lead.

## **4 Never underestimate the generosity of other people nor the pleasure of providing service to others**

Along the Camino I met a wonderful woman in a rundown town in the Meseta, a very dry, poor part of northern Spain. She provided me with food and water and directions to a building I wanted to see. At the end of our meeting she said, 'No, no. I don't want any payment. When you get to Santiago, pray for me. My name is Gloria.'

As your journey progresses, you become a champion for other people.

Each of us, every single day, is a champion for a community. Sometimes this means we do things that other people cannot do for themselves – but we also receive so much. It is important to re-energize your spirit to take on the challenges you face. Finding joy in the work and in your relationship to your community is essential.

## **5 Being alone is not the same as being lonely**

The fifth idea is one that we in the West have a tremendous amount of difficulty dealing with: the notion that being alone is not the same as being lonely. The only times I've ever been lonely in my life have been in crowds. Loneliness means being surrounded by people with whom you have nothing in common.

Being deliberately alone, however, allows you to find stillness. Stillness is the source of oxygen from which we can draw refreshment. In our modern, frenzied world, stillness is under such attack that we have no time to touch the divine – whatever that means to each of us – because we're trying to get through an incredible cacophony of noise, change and distraction.

It is critical to be 'selfish,' to make time to sit back, to walk and move at a human pace, and to have a dialogue with ourselves. Whatever our sense of the divine is, this process of renewal is incredibly powerful, and allows us to keep leading.



## FIVE GOOD RESOURCES

1. *Man's Search for Meaning*, by Viktor E. Frankl (Beacon Press, 2000).
2. *The Alchemist: A Fable about Following Your Dream*, by Paulo Coelho (HarperCollins, 2006).
3. *The Pilgrimage: A Contemporary Quest for Ancient Wisdom*, by Paulo Coelho (HarperCollins, 2000).
4. *My Camino*, by Sue Kenney (White Knight Publications, 2004).
5. *Desperado*, by The Eagles (CD; Asylum Records, 1973).

In 2010 **ROCCO ROSSI** ran for mayor of the City of Toronto. Though unsuccessful, after a third walk along the Camino following the election, Rocco decided to run for MPP in the upcoming provincial election in October 2011. Rocco has a breadth of experience working in the private and non-profit sectors. Prior to becoming the CEO of the Heart & Stroke Foundation of Ontario he was president and COO, MGI Software; VP, Interactive Media, Labatt/Interbrew; and VP, Strategic Planning and New Media, The Toronto Star. Rocco has served on both private-sector and non-profit boards, and has volunteer affiliations with several community organizations, including the United Way of Greater Toronto, the Ivey Foundation, New Haven Learning Centre and the Empire Club of Canada.



# INSTITUTIONAL CHANGE

*Alok Mukherjee*

- 1** Know yourself; know the lay of the land
- 2** Lay the groundwork fast, and don't settle for a half loaf; build support, and find allies within and without
- 3** If you can, find a new management team, let it be your ambassador, and resolve differences constructively
- 4** Use power strategically and with compassion
- 5** Assess, evaluate and communicate on an ongoing basis

**WE ALL KNOW** the expression: ‘I ain’t got all day!’ My theme is time: the time it takes to bring about institutional change, the time we have to make such change, and the price we pay if we run out of time before accomplishing real change in the organizations we are involved with.

Like most of you, I joined a board – in my case, the Toronto Police Services Board – because I considered the institution important, and I had a vision for it. My vision for the TPSB centred on making it a much more inclusive organization: in the way it sees itself, serves the community, makes decisions, sets priorities, uses public money, acts as a large employer and responds to the needs and expectations of the residents of Toronto. These aren’t just far-off goals; I would like to ensure that they have been achieved, or at least that a solid foundation for them has been laid, before my time on the board is up.

Although we’re all familiar with the ‘ain’t got all day’ refrain, most of us have also been counselled, at one time or another, that institutional change takes time. (Alternate formulations: ‘Be realistic’; ‘Don’t rock the boat’; ‘Don’t go too far, or too fast.’) The notion that change takes time is perhaps one of the greatest sources of conflict and mistrust between organizations and seekers of change who feel, often rightly, that they have already waited long enough.

I suspect that most organizational change theories have not dealt with the question of time as I have posed it because they have been developed from organizational perspectives, with the aim of making change palatable to those already in power. And from this perspective, the inclination to preserve the status quo can trump the need for change, and certainly the need to move change forward more quickly. My ideas on this subject are therefore not derived from books or theory; they come from praxis.

## **1 Know yourself; know the lay of the land**

It is a great ego boost to be invited to sit on or chair the board of an organization. There is, understandably, an inclination to say yes and a sense of obligation to help an organization in need with your particular expertise, skills, experiences and networks.

But it is extremely important to be clear about your motivation for taking a place on a board, to know what role you want to play as part of the leadership of the organization, and to consider whether you are the right fit for it, and whether it is the right fit for you. Whether you can make a contribution depends not just on what you bring to the table, but equally on whether the organization is ready for you and the ideas – including ones about institutional change – that are part of your vision. This will help ensure you avoid being an ornament, a token – instead of a real agent of change – on any board on which you sit.

In getting to know an organization you might join, pay attention to its informal as well as its formal culture. If you stop with the formal culture, you may well find that while it makes bold pronouncements on matters that may be dear to you, informally it conducts its day-to-day business otherwise. This informal culture is often more powerful than the formal one.

This is an idea that concerns what happens *before* you get involved with an organization, a guard against setting yourself up for failure, frustration or a loss of credibility in the public eye.

## **2 Lay the groundwork fast, and don't settle for a half loaf; build support, and find allies within and without**

My second idea is a cluster rather than just an idea; this is because the elements are interdependent.

With the benefit of knowing the lay of the land already, when you take a leadership role on an organization's board, you come equipped with a developed sense of the changes you would like to make.

Organization theory specialists, often working in the abstract, tend to lay out elaborate models of the change process. While they offer valuable insights that should not be disregarded, I have great trouble with their linear, step-by-step approaches. These are based on the assumption that organizations are rational, logical entities and change can be managed

by following a blueprint, much like building a house or assembling furniture. The reality is that most organizations deal with a hundred challenges at once. As well, a linear change process that insists that you must take one well-considered step after another requires an extended time frame and – as we already know – we ain’t got all day! Nor do those who have waited a long time for change to happen.

This is why I prefer the approach of someone like a web developer, who knows that since the internet is dynamic and constantly evolving, speed rather than perfection is of the essence. The best strategy is to pursue initiative, and then make the corrections and adjustments that may become necessary along the way. This is what I mean by laying the groundwork fast.

In doing so, it is also important not to settle for a half loaf.

This is the opposite of the admonition to be realistic. In seeking institutional change within the finite time we have at our disposal, there is little room for timidity – and when we are urged to be realistic, it is often just another way of asking us to be timid. It is important not only to start fast, but also to be ambitious.

While I advocate starting fast and going far, I do not mean to suggest that you should act without a game plan: it is extremely important to have one. But the plan should not become its own justification, without the flexibility to change course, make adjustments or take advantage of a serendipitous opportunity. In other words, an ambitious agenda of change requires that there be action on many fronts, and your plan must not restrict you from pursuing them.

When you enact such an agenda, there will be those who will push back, counsel patience, advise caution or question your authority. However, when you demonstrate that your actions are ethical and motivated not by self-interest but by the greater good, you will find there are allies within and without the organization. It is important to pay attention to these allies, and to enlist their support for the change you are seeking.

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In building this base of support, there is one final consideration to bear in mind. While you are *in* the organization, you are not *of* the organization. That is to say, the mutually supportive relationship you build should not blind you to the fact that your relationship to the organization is not the same as that of management and employees. There are bound to be different interests, but these need not be antagonistic. The supportive relationship, in other words, should be characterized by a creative tension.

### **3 If you can, find a new management team, let it be your ambassador, and resolve differences constructively**

Implementing change is the domain of management rather than boards, and so a board's best plans can prove ineffective, or not be implemented in a timely manner, because of resistance, inertia, incompetence or outright hostility on the part of management. Management, particularly the chief executive of an organization, needs to have the trust and confidence of the board, and to be on the same wavelength regarding the change process. Work to build an alignment between your new direction and your organization's management, but you should not allow so much time that frustration or conflict sets in. If it becomes evident that management is not on board with your changes, you will need to bring in new leadership.

There is, of course, more to it than just changing the management. The quality of the relationship between board and management is equally important. My point is not that the management should be a lackey of the board – the relationship must be between equals. This means you will be challenged by your operational head. Such challenges must be welcomed, because the dialogue that results will lead to balanced decisions that can be effectively implemented.

Implicit in this process is the real possibility that there will be conflict. Conflict is likely because the interests of the board and the operational head are not necessarily identical, though the goals they pursue must be. But conflict is not a negative phenomenon: it can result in great creativity, provided there is an effective process to resolve differences and the disputes are not personalized.

Management is the linchpin; without effective managers, change cannot happen. With honesty, productive tension, mutual respect and

understanding of each other's interests, the chances of a change process succeeding are increased significantly.

## **4 Use power strategically and with compassion**

Because change is a process marked by possibilities of conflict, resistance, sabotage, hostility and so on, it is inevitable that the process will involve transactions in power.

Power is not a simple element – it comes in many forms, such as knowledge and expertise power, charisma power, network power and status power. To manage change effectively you must discern which forms of power you possess yourself within the context of your organization, and how best to use them. (Status power, for instance, has limited uses, and should be used only as a last resort.) Power is most effectively wielded when it is the right type for a given set of circumstances.

Above all, the thoughtless use of power can be hurtful, negatively affecting your organization. It is most important to use power wisely and with compassion.

## **5 Assess, evaluate and communicate on an ongoing basis**

You must evaluate the results you achieve with any change process, and do so continually. This helps ensure you don't become complacent, and that you make necessary adjustments and corrections rapidly.

I am not referring to a formal and time-consuming activity but something simpler and more basic, akin to taking a pulse. We need to do this as a matter of course, as part of our routine interactions with people both inside and outside our organization.

Pulse-taking depends on communicating widely and on an ongoing basis, especially with the community your organization serves. Those whom you consider your base of support, those who have advocated for change, need to know that you are pursuing it, and that your efforts are yielding results. At the same time, you need to find out from your community if they are feeling the effects of that change: it is through this process of communication that you'll know if you are being effective.



## FIVE GOOD RESOURCES

1. *Education for Critical Consciousness*, by Paulo Freire (Continuum, 1981), is a classic work of theory based on praxis.
2. *The Web of Inclusion: A New Architecture for Building Great Organizations*, by Sally Helgesen (Doubleday, 1995), offers several models of successful organizational change.
3. *The Multicultural Leader: Life Stories of Influence and Achievement* by Soosan Daghighi Latham (Backalong Books, 2010).
4. *Race to Equity: Disrupting Educational Inequality*, by Tim McCaskell (Between the Lines, 2005), like *The Multicultural Leader*, provides interesting accounts of the work, underlying values and personal histories of some Canadian change agents.
5. *The Careless Society: Community and Its Counterfeits*, by John McKnight (Basic Books, 1995), combines storytelling, political philosophy and an activist's passion for talking about the ability of communities to heal from within.

**DR. ALOK MUKHERJEE** is the first South Asian to be elected chair of the Toronto Police Services Board. Alok has taught courses on Indian and South Asian culture and society at York University, is managing associate of an Ottawa-based consulting firm, and has many publications in a variety of areas including diversity, inclusivity and anti-racist education. He has held several public appointments including vice-chair and acting chief commissioner of the Ontario Human Rights Commission, has sat on many boards, and has received the Ontario Volunteer Service Award as well as a commendation from the mayor of Toronto.