

Connecting The Community Ecosystem to Maximize Impact: A Q&A with Michele Juliana

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Abstract

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A. (Juliana) Learning from corporate success models, effective non-profits focus on data-driven decision-making to attain their mission outcomes. Unfortunately, it often takes a crisis to jump-start change. A great example is the city of Charlotte, NC which was ranked last in upward mobility among the 50 largest US cities in the 2014 Chetty Study. This crisis was a wake-up call that led the ecosystem's leaders to form a comprehensive coalition to address the core issues, including the private sector, nonprofit, and government representation. An organization called Leading on Opportunity was formed by the community foundation to collect and analyze data to drive prioritization and timely decisions. This organization has developed a detailed dashboard of 33 key indicators across five areas of improvement and is available for public use to help focus resources on areas that have been proven to make an impact. An example of the effectiveness of this model can be seen through my personal experience at RSM. As a private sector professional services firm, RSM has utilized this data to identify the recipients of local fundraising and volunteer activities – working with nonprofits addressing the issues of upward mobility.

On a much broader scale, community organizations, policymakers, public institutions, and others in the ecosystem leverage this data, strengthening collaboration and connections across sectors by crafting common metrics. With a shared language and accessible visualizations of the determinants of economic mobility, the ecosystem's stakeholders are continuing to make progress and show increased impact.

Q. What three private sector best practices might non-profit leaders leverage to drive innovation and change?

A. (Juliana)

First, many organizations waste money chasing the latest technologies without a plan aligning technology with their longer-term strategy. Don't start investing time or resources until you have a clear IT strategy in place that supports your entity's mission. For example, if you are looking to increase engagement within your donor base, be sure to develop a comprehensive engagement plan which supports your overall strategy before implementing a new fundraising system. Second, to address the many challenges with maintaining current technology, having access to the right expertise at the right time, and leveraging proven processes, consider outsourcing some administrative functions. Outsourcing accounting, IT, or human resources can enable you to secure fractional sharing of key resources when you need them and allow you to focus on the critical aspects of delivering your services. For example, RSM offers these services to our nonprofit clients through US-based employees with deep expertise who can share their experience across similar organizations and leverage consistent technology platforms and repeatable processes.

Third, work with your corporate partners to identify volunteers with skills who can help you to fill gaps. Companies are starting to realize the deep expertise they can provide to help nonprofits develop and execute their strategies, in addition to traditional volunteering opportunities. Reach out to existing volunteers as well as new prospective ones to build your non-profit's infrastructure. Examples where RSM has been able to help include accounting, technology, and risk management expertise, in addition to serving on boards and helping with coaching for public speaking and "how to make your pitch."

A final thought to share with this audience is to focus on building connectors in your community. Thriving, innovative nonprofit communities do best when they work together with each other and with other resources in the ecosystem. Examples that I have seen are local community foundations, the Satell Institute in Philadelphia, and Apparo in Charlotte. These organizations bring people together to share knowledge and resources, educate on issues, and energize the momentum we all need to genuinely make an impact.