

## **A Pathway to Good Governance: Philanthropic Culture and Capacity Building in Local, Community-Based, Family and Child Serving Agencies**

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### **- Abstract -**

This paper focuses upon the beneficial impact of capacity building efforts directed at the philanthropic culture of local, community-based, family and child serving agencies and its possible facilitation of board engagement and consequent improved governance.

The authors examine the data from a recently completed evaluation study of child member agencies of the Alliance for Children and Families. Over a period of ten years 225 members have participated in a capacity building program primarily funded by three national foundations. The program consisted of a series of workshops and seminars as well as a six-part, self-study, curriculum that was developed specifically for the child and family serving sector to enhance their philanthropic cultures and capacities. The evaluation study completed at year five, utilizing a random sample of participants, found a number of outcomes; most striking was that participating agencies each increased their annual fund-raising by an average of \$163,000. The authors will discuss the possibility that there was also an important impact on governance functioning due to the change in philanthropic culture as well as board member engagement as mission ambassadors.

The governance literature offers little examination of philanthropic culture as a part of board governance. When found it is most frequently as a negative reference to the “dysfunctional fundraising board,” with the implication that such a board is affluent and disinterested in issues of appropriate compliance and ethics, or worse it is distant from the mission and community served. However, the work of Paul Light and others gives support to the paper’s central premise that strong commitment to and engagement with mission by board members will positively correlate with indicators of good governance. The paper develops operational definitions of philanthropic culture, board engagement processes and behaviors (e.g. mission ambassadors) as well as indicators of improved governance so as to allow for further discussion and testing of the thesis.

The authors conclude that the direction of current literature and the evidence found in the evaluation study suggest that there is merit in further examination of the thesis that: *capacity building efforts directed at the resource development function in community-based, charitable, child and family serving agencies will correlate with improved board engagement and governance.* The authors are planning research to test this hypothesis; its results will be presented upon completion.

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## Introduction

A ten year philanthropic capacity building initiative targeting community-based, family and child serving agencies facilitated more effective fund development and board engagement. Our observation is that as board engagement in the fund development capacity of the organization increased so did the board member's sense of "moral equity" in the mission, in the community impact and in the agency's capacity to deliver on mission. Thus, improved governance capacity and behaviors arise organically from a posture of active philanthropic engagement. We believe that further research will demonstrate a causal relationship between good governance and an engaged board invested in the philanthropic capacity of the organization. We believe that the sequence of engagement followed by increased commitments to and improved governance is particularly relevant to community-based, charitable organizations where leadership volunteers are initially attracted to the values and good works of the entity rather than to a desire to provide excellence in governance, per se. Our overall hypothesis is that capacity building in philanthropy through active board engagement has a causal relationship with increases in the quality of governance functioning in community-based, charitable, child and family serving organizations.

## The Initiative

Begun in 1998 and primarily funded by The Rockefeller Brothers Fund, William Randolph Hearst Foundation and the Packard Foundation the resource development initiative of *The Alliance for Children and Families* was an enormously diverse training effort that included training, workshops, networking and a codified curriculum. It unfolded in many formats, across a multitude of sites, and involved substantial numbers of individuals in planning, writing, and teaching the curriculum, leveraging the active learning of hundreds more. The mix was leavened by role swapping by some of the key players. Individuals who wrote modules of the curriculum also sat as participants in some of the workshops. Workshop leaders later reappeared as participants in other training events. The sixteen members of the Steering Committee offered considerable training, wrote curriculum, but also attended many sessions taught by others and even wrote curriculum. Planning, writing, training, and learning were commingled through

this circular flow of people through roles, providing at least the opportunity for recursive magnification of the experience. It appears to have had an unintended beneficial impact on the quality of governance within this sub-set of the non-profit sector that participated in this resource development effort that included training, workshops, networking and a codified curriculum.

All told, 347 individuals, representing 221 agencies and independents registered for 819 events (i.e., person-events). Most participants attended several events, and a few attended more than 10. This pattern of repeated contact and serious investment of time by some individuals and agencies sets the stage for the penetration of training into practice at many agencies. Evaluation research of the project in 2004<sup>1</sup> demonstrated a significant fiscal impact with participating agencies increasing their annual development revenues in excess of \$163,000 per agency over the course of their participation. In addition to the financial success of the project it also further engaged participant agency executives and board members in “ambassadorial” activities that took the agency and its mission into the communities served (see below).

### Governance, Volunteers and Development

Little serious examination exists in the current literature regarding the relationship between philanthropic culture and governance practices. If philanthropy is addressed it is often done as a negative; as in references to the “dysfunctional fundraising board,” with the implication that such board members buy seats with large gifts, are disinterested in issues of appropriate compliance and ethics, and worse are distant from the community, clients, outcomes and impact of the organization. This type of board member is clearly a dinosaur. However, this model has never been relevant to the small, community-based child and family serving organization.

In orienting oneself towards a path of good governance it is useful to understand the degree to which non profit board volunteers understand their role and performance expectations in the organizations they govern. Also at stake here is the degree to which volunteerism shapes the sector as a whole.

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<sup>1</sup> Lengyel, T. and Harris, J. (2004) The Resource Development Network Project Evaluation. Department of Research & Evaluation Services, The Alliance for Children and Families, Milwaukee, WI

Volunteers compose more than one third of the nonprofit labor force in the United States and about 61.8 million people, or 26.4 percent of the population, volunteered through or for an organization at least once between September 2007 and September 2008<sup>2</sup>. Many of these volunteers serve as trustees, directors and board members who provide leadership, and make key decisions about mission and strategic directions for the agencies over which they govern and influence the direction of the nonprofit sector. This sector in 2006 accounted for almost 10% of jobs and 5% of Gross Domestic Product (GDP),<sup>3</sup> according to the Urban Institute's Nonprofit Almanac of 2008.

These statistics illustrate that the consequences of poor board engagement will be significant. In fact, as Wright & Millesen (2008)<sup>4</sup> write, one of the most important challenges facing nonprofit organizations today is managing and engaging a volunteer board of directors.

Board engagement and therefore good governance is no small task and the board members, who are often busy professionals themselves, must balance their volunteer activities against their professional and personal lives. Many, as it turns out, are opting out, at a time when our sector needs their leadership expertise more than ever. According to Volunteering In America<sup>5</sup>, for the second year in a row reports point to the continuing challenge of the volunteer leaky bucket with an estimated 22 million or one in three American volunteers dropping out between 2006 and 2007. This finding points out how important it is for organizations that use volunteers to treat them as valuable assets, give them meaningful assignments and use best practices in volunteer management.

Governance is quite simply the process of decision-making and the process by which decisions are implemented or ignored. Characteristics of good governance be they within a governmental organ or an NGO generally include concepts such as: accountability, transparency, responsiveness, inclusivity, law abiding, participatory as well as processes and outcomes that are effective, efficient and equitable.

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<sup>2</sup> Bureau of Labor Statistics, Volunteering in the United States, 2008  
<http://www.bls.gov/news.release/volun.nr0.htm>

<sup>3</sup> Blackwood, A., Pollak, T. & Wing, K. The Nonprofit Almanac of 2008. The Urban Institute Press 2008

<sup>4</sup> Wright, B. & Millesen, J. Nonprofit Board Role Ambiguity: Investigating its prevalence, antecedents and consequences. In The American Review of Public Administration Vol. 38, Number 3, September 2008

<sup>5</sup> <http://www.volunteeringinamerica.gov/>

To aid efforts in managing and maximizing the utility of nonprofit boards; Wright & Millesen (2008) suggest that many authors have attempted to answer important questions about what nonprofit boards should do, what constitutes best practice, or to what extent board members themselves are aware of their roles and responsibilities. However, their findings suggested that ambiguity often exists regarding the board's role because of lack of communication; board members often think they understand their roles even when chief executives disagree. As an example, it may be the case that the chief executive prioritizes certain activities whereas the board members place emphasis elsewhere. In addition, Wright and Millesen noted a strong relationship between role ambiguity and board engagement, meaning that a lack of role clarity results in ambiguous board behaviors.

At a time when our organizations are being challenged to demonstrate our public legitimacy in order to survive, there is little room for ambiguous board behavior. As Ostrower (2007)<sup>6</sup> writes, contemporary thinking on this matter was stimulated by legislation, not from within the nonprofit world, but out of the for-profit sector. The passing of the Sarbanes Oxley Act of 2002 sparked questions about nonprofit governance and board behaviors. In this light, as the fiscal reality of our organizations dawns on board members, they are compelled to look to donors and philanthropic capacity to insure mission viability and organizational survival.

Resource acquisition and the fiscal stability of the organization are imperative Board concerns for any nonprofit, but are core survival issues for the small, community-based human service agency. Failure to prioritize these realities in the current environment reflects a major lack of strategic thinking and planning on the part of the Board. Yet, Ostrower's recent findings from a national survey are most troubling. Her research suggests that substantial percentages of nonprofits report that their boards are not actively engaged in basic stewardship responsibilities. The majority of survey participants (51%) rated their board's performance in fundraising as only fair or poor, and having a paid professional executive director was negatively associated with board activity levels in fundraising. On a positive note, however, Ostrower found that board

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<sup>6</sup> Ostrower, F. (2007) NonProfit Governance in the United States; Findings on Performance and Accountability from the First National Representative Study. The Urban Institute

size was positively associated with board activity in fundraising, confirming the point that nonprofits use large boards, in part, not because we are thrilled about managing a large group, but because of their use as a fundraising tool and access to multiple avenues or relationships through which contributions can be leveraged.

Small, isolated boards are therefore not likely to be fertile grounds for growing a strong philanthropic culture. It suggests the need for investments in philanthropic capacity building if organizations are to remain as healthy and vibrant agencies, providing needed and valued programs within local communities.

### Organizational Capacity and Starvation of the Sector

We define capacity as the ability of nonprofit organizations to fulfill their missions in an effective manner. Funding of capacity is crucial. Building the capacity of nonprofit organizations to be more effective and sustainable enterprises continues to be critical in an environment of greater competition for limited resources. Experience has shown that many community-based nonprofits may engage in creative and effective programming but have difficulty with developing the capacity to sustain their work. They are often not adequately resourced to address the planning, training and developmental needs of staff and can suffer from a lack of coherent strategy, an unskilled board, and financial challenges all within a current economy that pushes nonprofits to continue to learn and do more with less.

In recent years the sector has experienced a period of unprecedented growth and the landscape of the sector is one characterized by dynamic activity and resilience<sup>7</sup>. Hand in hand with the growth of the sector, have come calls for help from individual nonprofits and from within the sector at-large to professionalize and invest in capacity. As nonprofit organizations become more important to society, it becomes increasingly more important that they meet public expectations and perform effectively.

Many nonprofit organizations are small, and have limited resources, and they struggle to keep up with the critical issues they were formed to address. In response, nonprofits have demonstrated a growing interest in practices and principles that will help

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<sup>7</sup> Salamon, L (2003) *The Resilient Sector: The State of Non Profit America*

them build high performing programs<sup>8</sup>. Hence, the renewed emphasis on capacity building within the non profit sector

The landscape of capacity in the nonprofit sector is one that remains ‘under construction.’ We and many others endorse continued study of and investment in this area. Indeed, capacity must rest on the notion that there is no single source or mechanism that will, on its own, help build capacity. The Amherst H. Wilder Foundation (2000)<sup>9</sup> notes, “for capacity approaches to truly achieve their potential, attention must be given to the web of connections affecting all persons, organizations, groups and communications involved and foundations are well positioned to serve as change agents in this process.”

There has been some debate in the field over the implications surrounding growth and capacity within nonprofit organizations. While infrastructure systems are considered crucial in the for profit world, these components have been given less priority in the nonprofit sector. In their study on capacity, Letts Ryan and Grossman (2002)<sup>10</sup> write that one of the biggest roadblocks to building capacity is the popular notion that non profits exist only on programs and services and that any capacity must be built in those terms and that administrative services are a burden to be tolerated. “The greatest challenge to capacity building appears to be rooted in the notion that nonprofit-like means doing more with less under unyielding pressure.”<sup>11</sup>

This challenge is well summarized by Clara Miller as she cautions against the temptation for funders to only invest in program, and ignore the big picture of capacity building: “In confining their criteria for eligible funding to the marginal costs of programs that are relevant to the pursuit of their own missions, funders may unintentionally contribute to the systemic undercapitalization of the sector – controlling rather than developing the sector and incentivizing the growth of programs without providing for the commensurate growth in capacity”<sup>12</sup> to sustain commitments and quality.

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<sup>8</sup> McKinsey & Co (2001) Effective Capacity Building in Non Profit Organizations.

<sup>9</sup> Amherst H. Wilder Foundation “Capacity Building” <http://www.wilder.org/suc/capbuild.html>

<sup>10</sup> Letts, Ryan and Grossman (2002) “High Performance Nonprofit organizations: Managing upstream for greater impact”

<sup>11</sup> Letts, Ryan and Grossman (2002) “High Performance Nonprofit organizations: Managing upstream for greater impact”pp6

<sup>12</sup> Miller, C (2001) “An Introduction to Non Profit Capitalization,” The Non Profit Finance Fund

In terms of strengthening the sector, the holistic approach in linking mission and money together has been identified as a sound approach to balancing programs, capital structure and organizational capacity. (Miller, 2001)<sup>13</sup>. Further research conducted by McKinsey's (2001) study has shown that when organizations do take the time to assess their needs in terms of capacity, the best results are achieved when organizations take a deliberate and proactive approach utilizing assessment tools, or other assessment instruments<sup>14</sup>

Connolly & York (2002)<sup>15</sup> provide insight into why this investment appears to be so small. Simply put, evaluating capacity building can be difficult. It is hard to develop measurements for assessing organizational effectiveness and management assistance success, because there is no simple financial bottom line to appraise in the nonprofit sector.

It is clear that the infrastructure development of non profit organizations has not kept pace with the demand for services. Non profit boards must take steps now to invest in the capacity of their agencies to deliver at the level their clients deserve and that funders are demanding. Without an active and engaged board that develops its philanthropic capacity and presence in the community it is unlikely that fiscal viability of mission commitments will be possible.

#### Board Engagement and Board Ambassadors

According to Webster's Dictionary engagement is: "the state of being interlocked with", "binding oneself to do something", "binding by a pledge", "a promise to be present at a specific time and place", and "the state of being in gear". Extrapolating this definition to "board engagement", translates to a board member who pledges active participation in the organization's mission to actively carry out the roles and responsibilities of being an effective board member. It is our position that "board engagement" is critical to effective governance and it includes, among other things: active attendance at board meetings; attendance at committee meetings; personal

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<sup>13</sup> Miller, C (2001) "An Introduction to Non Profit Capitalization," The Non Profit Finance Fund

<sup>14</sup>McKinsey & Company (2001) "Effective Capacity Building on Non Profit Organizations" Venture Philanthropy Partners 2001

<sup>15</sup> Connolly & York (2002) Evaluating Capacity Building Efforts for Non Profit Organizations In OD Practitioner Vol 34, No 4 2002

financial support of the organization; financial support of the fundraising events; bringing particular skills and abilities to moving the mission of the organization forward; and loyal support of the organizational mission, goals and objectives.

A key indicator of board engagement is the degree to which a board member takes on the role of “board ambassador.” According to Webster’s Dictionary an ambassador is: “an authorized representative or messenger.” Extrapolating this definition to the concept of a board ambassador means that the board member is an authorized representative of the mission of the agency and takes that message into their sphere of influence as well as into new community venues. In order to be a good board ambassador, a board member must believe in the organization itself and identify with its mission and goals. In addition, to be a good board ambassador, a board member must be equipped to answer the following questions: Why do you exist in the first place? What is distinct about the organization? What do you feel the organization merits support? What is it that you want to accomplish and how do you intend to do it? How will you hold yourself accountable?

In other words, board members must be clear and endorse the goals of the organization wholeheartedly. A board ambassador is a loyal engaged agent or minister of the mission. The activity of an engaged board ambassador is to advocate for the organization and build support within the wider community. A board ambassador expands the visibility, reach and number of friends of the mission. This is the result of their activities as an effective board member.

An effective board ambassador results in wider audiences being aware of the organizational mission which further supports the viability of the organization. The results of this awareness include the organization being more frequently consulted, being top of mind among community decision makers, asked to participate in official and unofficial ways and sought out by colleagues and government for collaborations.

An engaged board member is capable of articulating the mission in such a way that others who share the organization’s values will be feel compelled to invest. Therefore, one hypothesis we suggest for further study is the probable correlation between an increase of philanthropic dollars and an effective and engaged board evidencing ambassadorial behaviors. Furthermore, we believe that this an essential

foundation for addressing the systemic under-funding of capacity that has been undermining community-based, human service organizations and their missions for more than the last decade.

### Organic Development of Good Governance

The underlying dynamics of a community-based, philanthropic culture and the board engagement it calls forth support and drive principles of good governance. Fund development in the community-based, charitable sector is most typically successful with the strong support and engagement of the board.

Nonprofit governance is a hot topic within academia and mainstream media. A variety of scholars have debated the model of good governance as it relates to the health and vitality of the nonprofit sector for years. The literature review offers little substantial examination of philanthropy and development as a part of board governance. The board models of the 80s and 90s are more “prescriptive” in nature, such as Carver’s model.<sup>16</sup> Yet, as previously cited, Clara Miller makes crystal clear that without a “subsidy-business” (most typically, philanthropy) the basic fiscal drivers and business model of charitable entities collapse under the weight of under-funded marginal cost fees and grants. Understanding the basic business model is a core requirement of any strategic planning governance process. Failure to do so can only be interpreted as a governance failure.

The current trends have disparities and tensions: from the scientific and prescriptive movement that is associated with the IRS, to the war on waste campaigns of the Charity Navigator, to the transparency group with its focus on information availability, and finally to the liberation management approach with its eye on outcome, organizational improvement and community connections.

More recent debate centers on board engagement as it relates to successful fundraising and good governance (Light, 2008). In a recent interview in the Nonprofit Quarterly, Professor Paul Light<sup>17</sup> leans heavily toward the “liberation management” model. As he says: “The boards I’ve come to admire are the ones that actively seek

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<sup>16</sup> Carver, John and Carver, Miriam. (1997). Reinventing Your Board. Jossey-Bass Publishers, San Francisco

<sup>17</sup> Light, Paul. (2008). “The Shifting Tides of Nonprofit Governance, Interview with Paul Light.” Nonprofit Quarterly, Summer, 2008

information among the people they serve.” These are boards that have strong ties with their communities, are connected with the clients served and seek information on their organizational impact (e.g., the Board reviews outcome data). It is a perspective that sees “good governance” in the context of organizational innovation, improvement and health, not a prescribed set of behaviors, data transfers, and artificial and destructive financial metrics that penalize capacity building. Professor Light asks: “If you want a fundraising board, how are you going to meet the transparency and engagement responsibilities of the board?” Our thesis attempts to begin to answer Professor Light’s inquiry.

Professor Light suggests: “the goal (in governance) should be engagement.” That is also precisely the key to board involvement in successful resource development and the building of a philanthropic culture. The key question then arises: are community volunteers attracted to serve on boards of trustees due to “models” of good governance or are they engaged by a compelling vision, a mission that is consistent with their values and community aspirations? Do they come to leadership in their communities with a sense of governance principles? And if not; how are principles and practices of good governance best developed in those caring and committed volunteers?

Light’s core qualities of good governance (engagement) are essentially captured in the basic characteristics needed for successful resource development. Are we suggesting that development, per se is a governance function? No, we are not. But attention to fiscal drivers and financial viability are key governance responsibilities. What we do suggest is that the charitable, community-based service board that is investing time and energy in its resource development capacity, or as Clara Miller<sup>18</sup> writes, its “subsidizing business” in support of mission, is most likely manifesting the characteristics of good governance and is moving increasingly toward a stronger and more engaged Board that is mission focused and connected with the community and those served. In this case form follows function; or in other words, in the real world of community-based charitable agencies good governance does not happen because we are committed to models of “good governance;” rather good governance occurs when a Board has a passion for its mission, a commitment and strong connection with its community and is engaged in ensuring its services are meaningful, relevant and first rate;

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<sup>18</sup> Miller, Clara. (2001) “An Introduction to Non Profit Capitalization,” The Non Profit Finance Fund.

that is the bedrock foundation of successful resource development. Good governance arises organically from a posture of active engagement. In regard to development Light makes clear that, “fundraising is best done by facing the organization into the environment and asking people to contribute . . . The quality of the board should be based on its expertise and readiness to engage, not on its pockets. . . The goal (of good governance) should be engagement.” The very same is true for successful resource development. It is not about deep pockets, it is about engagement and it rest upon community relationships.

Quite simply the board holds the mission of the community-based agency as a public trust. The Board has the obligation and responsibility to insure that the entity maximizes every opportunity to manifest the mission in service to its community and to do so in accordance with the community’s ever changing needs. Furthermore the Board of Trustees is responsible for ensuring that the delivery of services and the management of its resources are done in compliance with public law, at the most efficient and effective level possible, at a quality level that reflects their deep commitment to the community and those served by the agency and to be accountable for its performance.

We suggest, and plan to undertake, further research to examine the relationship of successful resource development in community-based, charitable, child and family serving agencies and excellence in Board governance. We believe that research will show that those agencies who are investing in and committed to excellence in resource development capacity building within their organization are at the same time enhancing and strengthening their Board’s governance capacity and function; and that a failure to recognize the necessity of investments in resource development capacity building in this environment, in the human service charitable sector which requires a “subsidizing business” in order to meet mission commitments, is absolutely an indicator of a breakdown in governance functioning.

For those of who work day in and day out in the trenches of the nonprofit sector discussions around “good governance” are often too abstract to appear relevant. The study group’s decade-long commitment to building philanthropic culture has yielded an unplanned benefit for them in terms of board member engagement. It is important to

determine the degree to which those changes have also resulted in improved governance awareness and functioning.

### Future Research Proposed

As stated in the introduction, the overall hypothesis of this study is that capacity building in philanthropy through active board engagement will have a causal relationship with increased quality of governance functioning in community-based, charitable, child and family serving organizations. As such and building upon the evaluation study performed in 2004 the authors plan to seek funding to examine the evolving governance functions of the participating agencies, most of who continue to be active with the Alliance for Children and Families and with the resource development initiative begun in 1998.

In addition to developing operational and measurable definitions of board engagement and board ambassadorial behaviors the evaluation will require the development of measurable proxies of excellence in governance. In that regard we will examine eight (8) major characteristics of governance functioning: participation; rule of law; transparency; responsiveness; consensus orientation; equity and inclusivity; effectiveness and efficiency; and accountability. These characteristics are universal in their acceptance and are endorsed by the United Nations Division of Public Economics and Public Administration. They are equally applicable to governmental organs and non-governmental organizations. We will seek to integrate these universal principles with the 2007 recommendations of The Independent Sector's Report on Good Governance and Ethical Practice where in they identify effective governance as one of the four issues necessary for the sector to maintain the trust of the community. The other three issues were: legal compliance and public disclosure; strong fiscal oversight; and responsible fundraising. All three of these issues are easily interpreted as necessary components of excellence in governance.

We hope to complete this study within the next 12 to 18 months and will be honored to present the results at a future conference of the Midwest Center for Nonprofit Leadership at the Block Business School of the University of Missouri, Kansas City.

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