

WHAT'S NEXT *for* COMMUNITY PHILANTHROPY



FLIPPING ORTHODOXIES: Questioning ingrained assumptions in your work

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Overview

Organizations are often held back by orthodoxies about how their work should be done.

According to the innovation strategy firm Doblin, orthodoxies are deeply held beliefs about how things are done that often go unstated and unquestioned. They can be found everywhere — in the mind of an individual, in the protocols of an organization, and in the best practices of an entire industry. This conventional wisdom isn't bad — after all, it helps create standard practices that help individuals and institutions function more efficiently — but it can lead to resistance to change (“That’s not how we do things around here”) and blind spots in the decision-making process.

Every organization and industry has orthodoxies. In commercial aerospace, Southwest Airlines has flipped almost every orthodoxy in the industry by doing away with the hub concept, having no assigned seating, flying only one type of plane, and deciding to make the customer experience fun. In the bookselling industry, Amazon has flipped several orthodoxies in the last decade by building its whole business model around the idea that books could be sold online (versus at a brick-and-mortar bookstore), and then again by making a big bet on e-books (versus sticking to the idea that reading requires paper-based products).

Community philanthropy organizations also hold on to a number of orthodoxies — some of which may be preventing them from trying new approaches for serving their communities.

Through interviews with nearly 200 leaders in community philanthropy and more than a dozen interactive workshops and user feedback sessions, the *What’s Next for Community Philanthropy* research team identified and refined a list of 40 different orthodoxies in community philanthropy (e.g., “Donors are ultra-wealthy,” “Operations need to be in-house,” and “We work in the nonprofit world”). These orthodoxies touch on many of the deep-seated, unstated assumptions that community philanthropy organizations make about the different roles that they play in their communities — from financial and donor services to capacity building to advocacy — as well as how these organizations go about doing their work.

Not all of these orthodoxies are necessarily bad. They may represent cornerstone values and beliefs about how work gets done that are worth holding on to. But in many cases, these assumptions, when left unquestioned, can get in the way of progress. As such, it is critical for organizations to periodically reexamine their orthodoxies to ensure that they are still a valid and productive part of their work.

Given the sheer size and diversity of the community philanthropy space, it’s no surprise that many of the orthodoxies in the field are already being turned on their heads (or “flipped,” as we like to say) by community philanthropy organizations across the world. Here are a handful of orthodoxies in the field that community foundations, in particular, are flipping:

- **Donors are ultra-wealthy.** The Community Foundation of Greater Memphis has challenged the assumption that donors are necessarily wealthy through a program that enables residents to give as little as \$1 per day. Members of the program, which is called **GiVE 365**, pool their daily dollar together, choose an annual theme to guide their grantmaking, and collectively decide which organizations will receive the money after researching the applicant organizations and hearing three-minute presentations at a finalist event. GiVE 365 members have awarded nearly \$225,000 over the past four years to Memphis and Shelby Counties’ nonprofits.
- **Operations need to be in-house.** Kern Community Foundation outsources its back-office accounting and finance activities to Greater Horizons, a subsidiary of the Greater Kansas City Community Foundation. This outsourcing frees the Foundation’s 4.25-person staff to focus their energy on doing programmatic work and developing new offerings to donors, such as processing real estate gifts through the Kern Real Estate Foundation, offering charitable giving cards to local businesses, and doing contract work for local private foundations.
- **We work in the nonprofit world.** The Telluride Foundation manages a **venture accelerator** for early stage and startup businesses in areas such as tourism and recreation, energy, and education. Each year, it enrolls up to six entrepreneurs in a five-month Telluride-based accelerator camp that includes \$25,000 equity investment, mentorship, and networking. The program taps Telluride’s community of entrepreneurs and second homeowners as mentors; coordinates with small-business development centers for targeted training; and runs the tellurideXchange, an online community forum for entrepreneurs.
- **We should stay out of public policy.** The Silicon Valley Community Foundation has taken a strong stand against payday lenders by testifying at city, county, and state government meetings to educate officials, meeting one-on-one with legislators to ask for their vote on bills, and even putting a lobbyist on retainer. The Foundation has funded 501(c)(3)s and 501(c)(4)s, as well as city government departments, to conduct research and raise awareness and has supported a coalition of grantee advocates against predatory lending. As a result of the Foundation’s advocacy, lawmakers enacted various laws strengthening consumer protections, stopped attempts to raise the maximum loan amount, and established a payday loan alternative pilot.

This exercise is designed to help you identify and flip orthodoxies that may be obstacles to innovation in your organization.

Orthodoxies are, by definition, rarely questioned or challenged, which can make them hard to surface and discuss head on. This exercise was designed as a card game to help make the process easier. It aims to help your staff, senior leadership, and/or board get clearer about deeply held assumptions that underlie your organization's work, identify those beliefs that may be holding your organization back, and provide you with a process for challenging them. We hope that it empowers you to question ways of doing things that may no longer be aligned with your organization's mission, capabilities, resources, and changing context.

This document is part of the *What's Next for Community Philanthropy* toolkit, which was published by Monitor Institute in June 2014 with support from the Council on Foundations, the Charles Stewart Mott Foundation, the W.K. Kellogg Foundation, and Community Foundations of Canada, along with more than 15 North American community foundations.

The *What's Next* toolkit aims to help community philanthropy organizations apply innovation and design methodologies to think creatively about their business models and the broader future of the field. The research for this toolkit involved nearly 200 interviews with leaders of community foundations and other community philanthropy organizations, as well as more than a dozen interactive workshops and user feedback sessions.

Visit monitorinstitute.com/communityphilanthropy to learn more about the *What's Next* toolkit and research methods.

Objectives

This exercise is meant to help community philanthropy organizations — their staff, senior leadership, and/or board — do three things:

- Create greater awareness about the assumptions underlying your organization's work
- Identify orthodoxies (unchallenged assumptions) that may be holding your organization back
- Brainstorm approaches for flipping these orthodoxies on their heads and developing new approaches rooted in new possibilities and circumstances

Materials and setup

We recommend doing this exercise in a small group(s) of five or six people.

What you'll need

- A copy of the instructions per small group (page 4)
- One deck of orthodoxy cards *per small group* (Appendix A) or one orthodoxies worksheet *per person* (Appendix B)
 - We have found that, for the purpose of this exercise, the deck of orthodoxy cards is much easier to use than the orthodoxies worksheet, and we highly recommend using the deck. To obtain the deck of orthodoxy cards, either print the PDF file in Appendix A or order a deck at cost through our website, monitorinstitute.com/communityphilanthropy/cardgames.
- A copy of the reflection questions per small group (page 5)
- Flip charts and markers to capture key insights
- A space where participants feel comfortable speaking up

Pework you'll need to have done

- Share the overview (pages 1–2) with participants ahead of time to establish a baseline understanding of the Flipping Orthodoxies theory and process.

The entire exercise (including the reflection questions) should take approximately 60–90 minutes.

Instructions

Small groups that are using the deck of orthodoxy cards (Appendix A): Take 15–20 minutes to complete steps 1–5 below.

Small groups that are not using the deck of orthodoxy cards: Follow the same instructions as above, but for steps 1 and 2 below, substitute the orthodoxy cards with the orthodoxies worksheet (Appendix B).

1. Deal out the full deck of orthodoxy cards around your table. It doesn't matter if people have slightly different numbers of cards in their hand.
2. Quickly flip through your hand of cards, one by one. Ask yourself whether the statement on each card (e.g., "Donors are ultra-wealthy," "Operations need to be in-house," and "We work in the nonprofit world") really represents an orthodoxy of your organization — a deeply held, unstated, and/or unquestioned belief about the way things should be done. If you determine that the statement is an orthodoxy, set it aside in a separate pile. Repeat this for each card.
3. Take a closer look at the orthodoxies you have selected. For each orthodoxy, consider the following questions: *Does it still make sense? What would it look like if you flipped it — partially or completely? What impact would flipping this orthodoxy have on your organization or community?* Select the one orthodoxy that appeals most to you. (Note: You may, if you wish, add your own orthodoxy on a blank card.)
4. Play the orthodoxy at the center of the table: in 30 seconds or less, explain the orthodoxy to your colleagues, telling them why you chose it and what it might look like if it were flipped. Go around the whole table, with each person playing his or her orthodoxy.
5. Discuss the orthodoxies on the table. Choose or vote on the one orthodoxy that the table would most want to flip. Write one sentence directly on the card about why you would want to flip it. (Note: If you are conducting this exercise alongside other small groups, share your one orthodoxy with the room in 30 seconds or less.)

Congratulations! You have now identified one or more orthodoxies embedded in the way your organization works that might be worth questioning or rethinking. Go on to the next section to continue reflecting on these orthodoxies and thinking of ways to flip them.

Reflection questions

These questions are meant to help you flip the orthodoxies you have prioritized for your organization. Ideally, you would flip only one orthodoxy at a time, in small groups of five or six participants. Allocate 45–60 minutes to answer these questions below as a group:

- Why does this orthodoxy exist? Does it still make sense?

If the orthodoxy should be flipped:

- Why is it hard to eradicate?
- What cases or examples (from a different time, in a different place, or in another field or industry) show you a different approach?
- What could you do differently to flip the orthodoxy?
- What would your organization look like if it were to flip the orthodoxy?

Next steps

This exercise can lead to several different follow-on activities, briefly described below:

- **Convince your board and staff that it's actually important to challenge orthodoxies in the field.**
 - It may not be apparent to everyone in your organization that it is necessary to continually challenge assumptions — particularly if your organization is financially stable. Help make the case for innovation by sharing with them the [What's Next overview](#).
- **Help your board and staff think about the orthodoxies of your organization.**
 - Ask individual board members to fill out and submit the orthodoxies worksheet (Appendix B), and then create a summary of the commonalities and differences in their responses. Share the results with the board and discuss the following questions: *How well aligned are their ideas about the organization's orthodoxies? What are the points of agreement? What are the differences? Why do the differences of opinion exist? How could you work through them?* If possible, consider bringing in expert help to facilitate the conversation, as differences of opinion can sometimes be challenging and should be handled carefully.
 - Run the exercise separately with your board and with staff, and then create a summary of the commonalities and differences in their responses. Share this analysis with both groups and discuss the following questions: *How well aligned are their ideas about the organization's work? What are points of agreement? What are points of difference? What might explain the differences?* Work with your board and staff to understand the commonalities and grapple with the differences, making sure that everyone has the same understanding of what you do, that everyone is working in concert, and that you can address areas where opinion is divided.
- **Work to flip one orthodoxy at your organization in the next 5–6 months.**
 - Work with your board and staff to agree on the one orthodoxy you would like to flip at your organization. Follow the [Generating New Ideas](#) design to help you think creatively about ways you could flip this orthodoxy. Once you've generated promising new ideas, use the [Prototyping Solutions](#) exercise to play out what an idea might look like if you tried to implement it in the days, weeks, and months to come.
- **Use the concept of flipping orthodoxies to improve programs and operations.**
 - The next time you are evaluating a significant program or operational issue for your organization, bring your staff together to brainstorm a list of 15–20 orthodoxies that have historically guided this work. Discuss whether any of these orthodoxies may be preventing you from trying new approaches, and use the reflection questions to think of ways to flip them.
- **Educate your board and staff about future trends and new possibilities.**
 - Think about whether any of the orthodoxies you surfaced could prevent you from meeting the future needs of your community. Hand your board relevant sections of [Shift Happens: How the world is changing](#) in advance of a board meeting, discuss the potential implications of these trends on your organization and community, and use the conversation to inform which orthodoxies you should flip in the weeks, months, and years to come. Consider doing the same with staff and senior leaders.
 - Many board and staff members are unfamiliar with the full range of possibilities for what a community philanthropy organization can do — and this lack of awareness can itself become the source of orthodoxies. Use relevant sections of [Bright Spots: Promising approaches in community philanthropy](#) to help them learn from what others are doing.

Appendix A: Orthodoxy cards

Print out the attached PDF file of orthodoxy cards on cardstock, double sided and “flip on short edge,” and then cut the cards to size — eight cards to a page.

You can also order a deck of orthodoxy cards at cost by visiting our website: monitorinstitute.com/communityphilanthropy/cardgames.

Make sure to print or order one deck for each small group.

Appendix B: Orthodoxies worksheet

Check the box if the statement represents an orthodoxy (i.e., a deeply held, unstated, or unquestioned belief about the way things should be done at your organization). At the bottom of the page, select the one orthodoxy that, if challenged, would have the most impact on your organization and/or community.

- | | |
|--|---|
| <input type="checkbox"/> We are neutral, impartial brokers | <input type="checkbox"/> We should stay out of public policy |
| <input type="checkbox"/> We work in the nonprofit world | <input type="checkbox"/> Our competition is commercial gift funds |
| <input type="checkbox"/> Donors are our primary customers | <input type="checkbox"/> We should support proven approaches |
| <input type="checkbox"/> Donors are ultra-wealthy | <input type="checkbox"/> Operations need to be in-house |
| <input type="checkbox"/> Donors are white | <input type="checkbox"/> We give in a specific geographic area |
| <input type="checkbox"/> Our donors are individuals | <input type="checkbox"/> We raise money from a specific geographic area |
| <input type="checkbox"/> Donors need us to manage their philanthropy well | <input type="checkbox"/> Asset development is our key priority |
| <input type="checkbox"/> We know better than donors | <input type="checkbox"/> Programs and donor services are separate |
| <input type="checkbox"/> Donors want our advice | <input type="checkbox"/> We don't operate our own programs |
| <input type="checkbox"/> We know our community's needs and issues | <input type="checkbox"/> We are permanent |
| <input type="checkbox"/> The community comes to us, not vice versa | <input type="checkbox"/> Our role is to lead |
| <input type="checkbox"/> We are the best vehicle for community philanthropy | <input type="checkbox"/> Donors will give us unrestricted dollars when they die |
| <input type="checkbox"/> Our purpose is to create an endowment for the community | <input type="checkbox"/> Big legacy gifts are the path to sustainability |
| <input type="checkbox"/> We need DAFs to be able to grow and prosper | <input type="checkbox"/> Our money is our most important asset |
| <input type="checkbox"/> DAFs are growing and will continue to grow | <input type="checkbox"/> Our business is philanthropic transactions |
| <input type="checkbox"/> We serve donors and should not push them | <input type="checkbox"/> Geography is the main way people identify themselves |
| <input type="checkbox"/> We make money from fees for service | <input type="checkbox"/> We treat all donors equally |
| <input type="checkbox"/> We make money from assets under management | <input type="checkbox"/> We should make discretionary grant decisions |
| <input type="checkbox"/> Money solves problems | <input type="checkbox"/> _____ |
| <input type="checkbox"/> We make grants | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Professional advisors are the pipeline for development | <input type="checkbox"/> _____ |
| <input type="checkbox"/> We invest our assets to maximize financial returns | |



The one orthodoxy you would most want to flip:

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