BE FEARLESS

FRAMEWORK FOR ACTION

Driving impact and inspiring change: A guide for **bold** leaders.

powered by: THE CASE FOUNDATION
We believe organizations that make a real difference are guided from within by strong leaders who are passionate about their cause, take risks and build teams of changemakers. That’s what it means to **BE FEARLESS**.

We developed this Framework for Action to help you do that. Read on to learn how to assess your organization, identify opportunities for increasing your impact and take the bold steps necessary to advance your mission.

You’ve already taken the first step on your **BE FEARLESS** journey by downloading the Framework for Action! After you’ve completed this series of challenges, you will have developed a clearer understanding of what it takes to create transformative change within your organization.
FIVE BE FEARLESS PRINCIPLES
A bold approach to social change.

We’ve seen inspiring social change made by organizations of all sizes and types across many industries—and a few things remain consistent. Here are five key insights shared by teams from all over the world that have made a powerful impact:

MAKE BIG BETS AND MAKE HISTORY
Set audacious, not incremental, goals.

EXPERIMENT EARLY AND OFTEN
Don’t be afraid to go first.

MAKE FAILURE MATTER
Failure teaches. Learn from it.

REACH BEYOND YOUR BUBBLE
It’s uncomfortable to go it alone. But innovation happens at intersections.

LET URGENCY CONQUER FEAR
Don’t overthink and overanalyze. Do.

Tip • The Five Principles: The five BE FEARLESS principles guide our philosophy on leadership for change. Learn more about each one at casefoundation.org/befearless

A bold, fearless attitude is key to social change.
But actually implementing change takes skill and resources—and not every organization, fearless though it may be, is ready to make large-scale change. Read on to see where your organization falls in the structural phases of fearlessness.
THREE STAGES ON THE PATH TO FEARLESSNESS

How to implement the _BE FEARLESS_ principles.

An organization’s journey to fearlessness is not always a straight path. It takes time for changemaking teams to internalize the five _BE FEARLESS_ principles, understand how they relate to a mission statement, implement them on multiple levels and communicate them as a fundamental value to external stakeholders.

As you read the stages below, think about how they apply to your organization’s treatment of one (or any) of the _BE FEARLESS_ principles. There is no standard timeline for moving through the stages, and your organization may be at a different stage for each principle.

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**STAGE 1

AWARENESS**

Get familiar with the five _BE FEARLESS_ principles. The five key principles may be new to your organization, or you may not yet have committed to taking action on it. If your organization is in the process of gathering information or knowledge, or simply asking important questions about the fundamental concepts, this is your starting point.

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**STAGE 2

ACTION**

Consider how your mission statement is affected. At this stage, an organization has moved beyond awareness and is taking steps to implement one or several principles at the same time. If your organization has internalized a fundamental concept of _BE FEARLESS_, understands its context within your mission statement and is ready to put it into action, this is where you should start.

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**STAGE 3

FEARLESSNESS**

Institutionalize actions, incorporate the principles into day-to-day culture. In the final stage, a principle is incorporated into multiple aspects of an organization’s culture and operations. If your organization has taken isolated actions to implement one or more of the five _BE FEARLESS_ principles at various levels and now wants to communicate that value with external stakeholders, this is the place for you to begin.
ELEMENTS OF FEARLESSNESS

Does your organization have an effective strategic plan?

It’s crucial for changemaking organizations to have smart business plans that implement effective operational strategies. We have identified seven core organizational processes that represent elements any dynamic organization should consider.

**CULTURE**
Building commitment among the team and developing a common set of values, norms and behaviors that guide day-to-day work.

**PLANNING**
Identifying how long-term strategy will be executed.

**MEASUREMENT**
Establishing metrics and creating systems for measuring activities related to the principles.

**FUNDING**
Aligning financial systems, grant processes and annual budgeting to enable the implementation of the principles.

**STRATEGY**
Establishing and implementing on a shared vision and overall direction for the organization and/or a programmatic area.

**COMMUNICATION**
Informing key stakeholders (internal and external to the organization) about the importance of applying the principles.

**EVALUATION**
Establishing systems for measuring progress and incorporating feedback.
PROGRESS GUIDE

Putting the pieces together.

Now that you understand the foundational **BE FEARLESS** principles, the three stages of implementation and the operational elements of constructing an effective business plan, it’s time to put it all together. The chart on the next page will help you assess how well your organization applies the principles to each organizational element.

*Remember, this is meant as a tool for you to think about your organization’s progress. There are no right answers!*

**First, read through each stage.**

For each operational element, we’ve described an example of what an organization looks like at each stage of implementing the elements of fearlessness. Read through each stage and think about how your organization approaches each process.

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**CULTURE**

**STAGE 1 AWARENESS**

*Ex:* You host regular internal discussions to brainstorm new ideas and identify opportunities for action.

Is this your stage? If so, write down how your organization will integrate this concept.

**STAGE 2 ACTION**

*Ex:* You select board members that represent multiple sectors and organizations with various expertise and perspectives.

Is this your stage? If so, write down how your organization will integrate this concept.

**STAGE 3 FEARLESSNESS**

*Ex:* You prioritize and act on strong hypotheses and data rather than waiting for “perfect” information; your board challenges you to make investments that follow these values.

Is this your stage? If so, write down how your organization will integrate this concept.

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**Then, get out a pencil.**

Mark where you think your organization falls on the spectrum and jot down a few examples that come to mind. If you think your organization has fully implemented Stage 1 but only partially implemented Stage 2, place a mark somewhere toward the beginning of Stage 2.

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Tips • Where Are You on the Path to Fearlessness? If you’re new to the **BE FEARLESS** principles, or just want to see how they work in the real world, [click here](#) to check out our case studies.

Print it Out. This exercise works really well workbook-style, so hang it on a wall or somewhere you will look at it often. Revisit your assessment at various points throughout the year to help you aim for creating the change you want. [Click here](#) for a printer-friendly version (legal paper recommended).
PATH TO FEARLESSNESS

Assess your organization

In the progress row, mark how far your organization has gone to implement the BE FEARLESS principles. Then note what your organization looked like in previous phases, how it can get to the next stage or how its major goals fit into future phases.

<table>
<thead>
<tr>
<th>ELEMENTS OF FEARLESSNESS</th>
<th>STAGE 1 AWARENESS</th>
<th>STAGE 2 ACTION</th>
<th>STAGE 3 FEARLESSNESS</th>
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<td>Ex: You establish a monthly or quarterly review period to consider unsolicited or off-calendar grant applications.</td>
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### PATH TO FEARLESSNESS

#### STAGE 1: AWARENESS

**Ex:** You set a monthly or quarterly meeting to discuss the emerging issues in your field and the strategies that could be used to address them. You intentionally talk with multiple organizations across sectors about the problem you are trying to solve.

**Ex:** You regularly communicate with internal and external stakeholders about your commitment to making dramatic change and willingness and ability to take risks.

**Ex:** You define how the organization will hold itself publicly accountable to making progress towards its goal.

#### STAGE 2: ACTION

**Ex:** You create processes for approving and evaluating experimental initiatives and leadership holds staff accountable for exploring new opportunities, maybe through a performance review system.

**Ex:** You have publicly recognized organizational failures, in addition to successes, and hold yourself accountable to learning for the sake of progress.

**Ex:** You routinely launch pilot or “proof of concept” initiatives as part of your strategy and identify early-stage milestones against which you measure progress.

#### STAGE 3: FEARLESSNESS

**Ex:** You allow for less evidence-based grant-making by investing in solid, logical plans from leaders with strong track records of success (rather than scientific/proven evidence of positive outcomes).

**Ex:** You regularly and publicly recognize organizational failures or missteps as learning experiences.

**Ex:** You define how the organization will hold itself publicly accountable to making progress towards its goal.

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## PATH TO FEARLESSNESS

### EVALUATION

**Stage 1** Awareness

Ex: You routinely ask your grantees and partners questions like, “What does success/failure look like?” “What have we learned from things that didn’t go as planned?” and “Looking forward, how should we adapt based on what we now know?”

### ACTION

**Stage 2** Action

Ex: You create an internal system that evaluates how you are tracking against success metrics in order to better understand what is and isn’t working.

### FEARLESSNESS

**Stage 3** Fearlessness

Ex: You collaborate with cross-sector partners to develop shared goals and performance measures to hold the broader community and multiple stakeholders accountable for long-term change.

### PROGRESS

**Evaluation:**

Ex: You occasionally fund high-risk initiatives, though often within program or portfolio boundaries.

### FUNDING

Ex: You establish a “just in case” fund to enable the organization to dedicate resources to urgent issues as they arise; you build flexibility into funding guidelines that make it possible to invest in the unforeseen.

Ex: You develop a pooled grant fund with other foundations, government agencies, and/or private sector companies; multiple partners collectively evaluate grant applications.

### Additional Notes:

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NOW WHAT?

It’s time to analyze your program assessment and bring in the rest of your team. Changemaking organizations rely on leadership from within to drive impact—so share the **BE FEARLESS** principles with your team, talk with them about the areas you’ve identified where you think your organization can improve and develop a plan for action.

**Analyze Your Progress**

Take a closer look at where you placed your marks. Are most of them within a particular stage? Or do you have marks in all three stages? Think about if you should focus on pushing your organization into the next stage, or if you can make small improvements in one of the seven categories.

**Talk to Your Team**

To truly implement the five **BE FEARLESS** principles, you’ll need help. Take your progress assessment to your team and talk to them about how you can push your organization forward—together.

**Develop an Action Plan**

With your team, decide what steps you need to take to evolve your organization. Prioritize areas of focus and write an action plan. Then present it to your leadership team.

**You're ready to take action. Go on—** **BE FEARLESS**.
“There are risks and costs to action. But they are far less than the long range risks of comfortable inaction.”
— John F. Kennedy