

FRAMEWORK FOR ACTION

BE BOLD. TAKE RISKS.

BE BRAVE. TAKE ACTION.

BE FEARLESS

**A STEP-BY-STEP GUIDE FOR LEADERS AND
ORGANIZATIONS THAT WANT TO BE FEARLESS.**



BE FEARLESS

powered by: **THE CASE FOUNDATION**

INTRODUCTION

Welcome! By engaging with this Framework for Action you are taking the first steps on your quest to being fearless. We created the Framework—complemented by a series of Stories of Action that highlight fearless, real world organizations—as a tool to help change agents at nonprofits and other social sector groups understand what actions they can take to implement a fearless approach.

THE FIVE PRINCIPLES OF A FEARLESS APPROACH TO SOCIAL CHANGE

1 MAKE BIG BETS AND MAKE HISTORY

Set audacious, not incremental, goals.

2 EXPERIMENT EARLY AND OFTEN

Don't be afraid to go first.

3 MAKE FAILURE MATTER

Failure teaches. Learn from it.

4 REACH BEYOND YOUR BUBBLE

It's comfortable to go it alone.
But innovation happens
at intersections.

5 LET URGENCY CONQUER FEAR

Don't overthink
and overanalyze. Do.

We designed this Be Fearless Framework for Action to provide social sector leaders, practitioners and others with tangible and tactical steps on their journey to take risks, be bold and fail forward. We hope it empowers change agents within an organization to better understand the extent to which their organization's actions and behaviors reflect one or more of the Be Fearless principles. This Framework offers a range of ideas about how an organization's actions may change over time as it becomes more fearless. While exploring these recommendations, you may discover even more ideas for how your organization specifically may embrace the Be Fearless principles.

THE THREE STAGES OF FEARLESSNESS

This journey is not always a straight path—your next steps as an organization could all stem from the Awareness stage, or you could take a mixed approach and implement suggestions from all three stages in connection to all five principles. We encourage you to read and reflect on all three stages and prioritize actions you would like to focus on first, second and third (and so forth) as you continue to evolve. There is no standard timeline for moving through the stages. Find what's best for your organization and report back on your successes (and failures!).

Stage 1: Awareness

Stage 1 is about showing awareness of a principle. An organization may be reflecting upon and discussing a principle, gathering information or knowledge or asking important questions about how it might take action. If a principle is a new concept to your organization and you're not yet committed to taking action, this is your starting point.

Stage 2: Action

Stage 2 is about action. At this stage, an organization has moved beyond awareness and is taking steps to live out a principle. If your organization is aware of the principle, knows what it means in your context, and is ready to put it into action, this is where you should start.

Stage 3: Institutionalization

Stage 3 is about institutionalizing the actions that define a principle. Here, a principle is visible in multiple aspects of an organization's culture and operations. If your organization already has taken isolated actions and now wants to ensure that it is consistently demonstrating a principle at multiple levels and regularly communicating about it with external stakeholders, this is the place for you to begin.

PUTTING PRINCIPLES INTO PRACTICE

We hear a lot of you say – “I love the Be Fearless principles but help me put them into practice!” So within the Framework, we’ve organized the actions into concrete operational and business processes through which organizations can purposefully pursue a Be Fearless approach:



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



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



Planning: Identifying how activities connect to the strategy the organization has defined in order to implement that strategy.



Communication: Informing key stakeholders (internal and external to the organization) around awareness and application of the principles.



Measurement: Establishing metrics and creating systems for measuring activities related to the principles.



Evaluation: Establishing systems for evaluating activities related to the principles and for incorporating feedback.



Funding: Aligning financial systems, grant processes and annual budgeting to enable demonstration of the principles.

AWARENESS



Culture: You host regular internal discussions to freely brainstorm new ideas and identify opportunities to explore.



Strategy: You establish a monthly or quarterly review period to consider unsolicited or off-calendar grant applications.



Planning: You set a monthly or quarterly meeting to discuss, “What are the emerging issues in our field and what strategies may be used to address them (e.g., separate fund for tackling urgent issues)?”



Planning: You intentionally talk with multiple organizations across sectors about the problem you are trying to solve.



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



Evaluation: You routinely ask your grantees and partners the questions, “What does success vs. 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?”



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

ACTION



Culture: You select board members that represent multiple sectors and organizations with different expertise and perspectives.



Strategy: You break big and complex social problems down into a series of manageable “wins” each with its own unique urgency, but each leading to achieving larger change.



Planning: You create processes for approving and evaluating experimental initiatives; leadership holds staff accountable for exploring new opportunities using these processes (through a performance review system).



Communication: You publicly celebrate organizational failures in addition to successes and hold yourself accountable to learning for the sake of progress.



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



Evaluation: 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.



Funding: 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.

INSTITUTIONALIZATION



Culture: 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.



Strategy: You establish a cross-sector “steering” or advisory board to advise on program/portfolio strategy.



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



Communication: You regularly and publicly celebrate organizational failures or missteps as learning experiences.



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



Evaluation: 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.



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

You have reached the end of the Be Fearless Framework for Action, but your journey has only just begun!

Next, you can check out the real world Stories of Action and the Be Fearless online hub, which includes even more free tools and resources.

Don't forget to share your experiences of taking risks, being bold and failing forward with us via Twitter:
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