

Engaging a New Generation: Junior League of Chicago

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APPROPRIATE USAGE

This case is best used with multiple groups of 5-8 members. Instructor should assign group members based on a distribution of skills and assign a leader and project manager for each. This case teaches the use of research, collaborative analysis and iterative problem solving. It is best used in advanced MBA Business Architecture courses students take after having completed their core courses. Instructors are highly encouraged to invite other faculty, past students and industry experts to attend final presentations and serve on the jury. This jury of experts helps to ensure that students are successfully communicating their ideas, are being asked insightful questions and receive the benefit of their expertise.

Introduction

The world is changing rapidly and organizations must change with it. People have less time and more constrained resources than ever before, and a constantly growing and changing set of choices for where they will use their time and invest their money.

The new Millennial generation is volunteering more of their time and donating more of their funds to philanthropic activities than any previous generation. However, they are volunteering and donating in completely new ways. An illustrating Vision Story:

“Sally is riding the commuter train to work. She looks up and sees an ad for a nonprofit that captures her interest and concern. Sally pulls her smart phone out of her purse, goes to the organization’s website and reads about their work. They are asking for volunteers and donations. Sally doesn’t have a lot of time or money, but she does sign up to volunteer to make phone calls to potential donors as a member of their fundraising team, and clicks on their Donate Now button to sign up to donate \$10 per month on her credit card. Just as she clicks Submit, her stop is announced. Sally logs onto her Facebook account and lets her friends know about the organization and her involvement in it. Sally is already feeling good about her day as she checks her emails, puts her phone away and heads for the door.”

This experience varies widely from the traditional nonprofit volunteer model: “Join an organization, volunteer on a committee, meet in person every month to plan and host events.” We suspect this is just the beginning of these types of shifts. The Junior League of Chicago is asking for our help to provide understanding and guidance as they embrace, realign and optimize for success in this new world.

The Junior League of Chicago

The Junior League of Chicago (“JLC”) www.jlchicago.org is an Illinois nonprofit organization begun in 1912. The JLC supports at-risk women, children and families in the Chicagoland area.

The JLC is a member of the Association of Junior Leagues International www.ajli.org, which has 160,000 members in 292 Leagues in four countries. Well-known Junior League members include Eleanor Roosevelt, Sandra Day O’Connor, Barbara Bush, Laura Bush, Betty Ford, Nancy Reagan, Shirley Temple Black, Julia Child and Katharine Hepburn.

The JLC primarily targets women in their 20s, 30s and 40s. It has three classifications of membership:

- **Associates:** new members in training who have specific goals and standards to meet
- **Actives:** provide the bulk of the volunteer work of the organization. Actives also have specific goals and standards to meet
- **Sustainers:** Members who have put in years of service to the organization and who wish to take a lesser role within the organization free from participation requirements. This flexibility allows Sustainer members to mentor Associate and Active members and put their JLC training into practice by serving other local nonprofits, usually at the board level.

The average Junior League member is known for their triple-A personality, positive and professional disposition, a willingness to pitch in without being asked reputation to go beyond the call of duty, and attention to detail. It is said that the average Junior League member gets more done on a Saturday

morning than most people get done all week. Junior League members seek each other out and enjoy each other's company.

Agencies welcome the involvement of the JLC because their members are trained, bring a deep expertise to the table, are enjoyable to work with and have the end goal in mind of a sustainable solution.

Case Statement

Below is the DePaul MBA project statement, which has received the green light from JLC leadership:

“We are turning to your students to help us tell our story in a meaningful way through our members via relevant channels to spur action and support. We hope the statement below provides direction and guidance that sets this project and your students on a successful path.

We are thrilled to be invited to participate in the DePaul MBA Business Architecture Class. Thank you for thinking of the League and giving us this opportunity to learn and stretch our thinking.

In its 98th year, Junior League of Chicago provides its more than 1,500 female members the opportunity to improve our community through direct volunteer service and as trained volunteer leaders. As we approach our 100th Anniversary in 2012, we want to find an engaging way to tell our story that honors our history and impact on Chicago while generating enthusiasm and participation in our future as we carry our mission into a new century. We want to present this story as a conversation rather than a bulletin board. To do this, we need to empower and guide our members to be the storytellers through social media, video and other modern, personal mediums. We've started this process by being where our members are – but we're not connecting in a deep and meaningful way. We want to move beyond merely having a presence to helping our members live their JLC membership more publicly. This could be as simple as listing their membership on their resume or as involved as videotaping a community project to help the League strengthen its narrative. We are turning to the DePaul MBA Business Architecture Class to help us tell our story in a way that moves people to action and mobilizes our members, supporters, and those we empower to serve as our primary voices.”

Primary Contact

Your primary contact will be Ann Brinkman, the JLC Executive Director. Ann runs an organization serving 1500 members, so please be respectful of her time.

Let's see if we can channel our communication with the JLC team through our course Facebook Page: <http://www.facebook.com/pages/Business-Architecture-Course-DePaul-MBA/495602480001>

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The Nonprofit Market

The nonprofit market consists of several groups:

- **Those Served**
- **Researchers** who identify ways to help—e.g., universities, independent
- **Program Designers** who turn the research into structured programs that can be funded and administered
- **Program Administrators** who operate the program, providing “Direct Service,” through agencies, schools, community centers, park districts, houses of worship, etc.
- **Consultants** who work on a contract basis to help the Program Administrators implement and operate the program
- **Regulators** e.g., government, private commissions
- **Funders** who provide the funds for running the programs via grants, one-time donations, annual giving, codicils in their wills, attending fundraisers, buying a product the nonprofit sells to raise money, etc.
 - **Non-Governmental Agencies**
 - **Governmental Agencies**—federal, state, county, township, city
 - **Private Foundations**—e.g., Polk Brothers Foundation, United Way
 - **Public Foundations**—e.g., Chicago Community Trust
 - **Corporate Foundations**—e.g., a bank’s own foundation
 - **Philanthropists**—e.g., wealthy individuals who give money to charitable causes
 - **Individuals**—approx. 75% of donations come from individuals
- **Staff** paid personnel who work for any of the groups above. Staff is often the largest expense for nonprofits, using up funds that could otherwise go to direct services.
- **Volunteers** unpaid personnel who donate their time and provide important expertise to help operate the organization, carry on its work and attract donations. (Solutions involving the use of volunteers must be designed to be flexible and broken down into small, discrete tasks, as volunteers’ work, family and other commitments often limit the time they have to give, and make it difficult for them to commit to anything concrete.)

A typical scenario in this market:

“An article appears in the paper describing an important unmet need. People read about it and press for a solution. Groups of individuals come together to form an agency to operate a program that provides a solution, approaching potential donors to fund their activities, and volunteers to help support their efforts.

The potential donors meet with the agency to understand the nature of the need and the program to address it, commit funds and receive progress reports from the agency as it administers the program.”

The things everyone in the nonprofit market agrees upon:

- There is not enough money in this market to serve the needs.
- Many important needs require multidisciplinary solutions developed by top professionals involving many different organizations.

JLC’s Role in the Nonprofit Market

The JLC provides trained volunteers, donations and advocacy support to help address needs in the Chicagoland area.

The JLC attracts young women to its organization, puts them through a rigorous hands-on training program to prepare them to effectively serve the community and provide tools they will need when working with agencies and organizations providing direct services. JLC members are expected to join and volunteer their time and expertise to other nonprofit organizations.

The JLC adopts a dozen or so community projects each year for which its members volunteer to work hands-on. These projects may include mentoring, tutoring, advising, etc. The training of volunteers is one of the JLC's most distinguishing characteristics in the nonprofit market.

Though nonprofits are barred by law from lobbying, they may engage in advocacy to bring attention to unmet needs in the community. The JLC adopts positions on important issues and puts their efforts behind bringing awareness to them in Chicago, Springfield and throughout Illinois.

The JLC conducts fundraising activities through small events, large galas, a holiday market, grants and an annual appeal to their members and friends. Those funds then support ongoing JLC community projects and volunteer training programs. The League forms funding partnerships with foundations and corporations when its membership identifies a project that can have a significant impact on the community, such as the League's founding of the Chicago Children's Museum.

The Fundraising (Development) Market

The Fundraising Market consists of several groups:

- **Those Served**
- **Donors** anyone who provides money, goods or services to help those served. Can be an individual, foundation, religious organization, etc.
- **Volunteers** anyone who gives their time to help those served; volunteers are usually also donors
- **Fundraising Professionals** anyone who is paid to help attract and manage money and volunteers. Fundraising Professionals consist of consultants who advise nonprofits, staff who run fundraising campaigns and support the efforts of volunteers, professional organizations that nonprofits hire to do fundraising for them
- **Fundraising Methods** events, galas, mailing campaigns, door-to-door solicitations, sidewalk solicitations, TV and radio commercials, etc.

This marketplace is highly competitive. Success depends on speaking to the right target audience using the right messaging, selecting the right fundraising method(s) for the audience, and the right support structure. A failed fundraising program is one that costs more to run than it takes in, yielding nothing to support those being served.

The New Channels

The world of business discovered social media in 2009. Business professionals are setting up professional Facebook pages, groups and fan pages for themselves and their companies in a way they never did with LinkedIn, MySpace or Plaxo. Those with public profiles are Twittering, and all are experimenting to understand how these highly engaging methods work and the role they will play in a well-structured personal/professional communication program alongside the more traditional video conferences, phone calls, letters, emails, meetings, dinners, events, etc.

Each is a superb game-changing tool that promises to enable the business professional to maintain many more quality relationships than was ever previously possible. Overuse can cause distress among those who receive excessive or wrong communications, while leaving little time for work, especially as more and more tools become available.

A balance must be struck and an architecture must be adopted that identifies which of these social methods to use when, with what audience, with what frequency, using what messaging schema, in combination with which other methods, using which interface, providing for what new capabilities in the future, etc. Those who master this **Social Architecture** will enjoy great efficiencies of effort and outdistance their competitors.

Your End Deliverable

A presentation of the recommendations your group believes are most appropriate for the client to adopt and why.

Careful Wording

You will need to be extremely sensitive to your client's personal feelings and political challenges. While you are compelled to present your honest views—it's what the client is depending on, you are also compelled to present your views in a way that will be most palatable to the client. This will keep the doors of dialogue open and allow inspired solutions to progress and take hold.

Process

Preparation

1. Client provides base data for the students about their organization and the challenges they are facing. This information should include organization description, structure and history, industry description, competitors, trends, financials, opportunities and challenges. Confidential information should not be shared with the students.
2. Instructor assigns Research Coordinator.
3. Instructor assigns Groups, Group Leaders, Group Project Managers. 5-7 members is ideal.
4. Class identifies areas of research necessary to solve the case.
5. Each Group Leader appoints members to each Research Team. The Research Coordinator is exempted.

Client Presentation to the Class

Client visits the classroom for one hour to present their organization to the class, and illustrate the need they would like the class to address. This visit is best scheduled for class 2.

Research Assignment (Research Teams)

Each Research Team will research their subject and prepare a written report for distribution to the class and client.

Deliverables:

1. Research Teams will provide their content to Research Coordinator the **SUNDAY NIGHT** before the assignment is due.
2. Research Coordinator will collect the research, format it, assemble into a single document, post in Blackboard and the course's Facebook page, email to the client, and bring a copy for each student to class.

Measuring Success: Research is thorough, accurate, relevant, empirically supported, communicated well and concise.

Analysis Assignment (Individual)

Each student will analyze the research data, create a Vision Story and two Lifestyle Scenarios for the organization, and form their own inspired solution for the organization. This is your opportunity to explore the boundaries of what is possible. Your analysis should include:

- a) **Vision Story:** Paint a detailed picture of the ideal future state of the organization in which all of the hopes expressed in the Case Statement are realized.
- b) **Motivational Strategy:** Define a detailed motivation strategy that will stimulate the client's members to adopt the practices described in the Vision Story.
- c) **Two (2) Lifestyle Scenarios:** Create two scenarios demonstrating how the prime elements of your motivational strategy fit in the lives of members. (e.g., "Sally attends a mentoring session, pulls out her smart phone, records a couple seconds of video and sends it to her Facebook friends while she waits her turn.")
- d) **Channel Matrix:** Create a Channel Matrix cross-correlating the current and future communications channels used by JLC members, supporters and staff with the types of information and activities appropriate for each channel.

Deliverables:

1. Each student, including the Research Coordinator, will provide their content to Research Coordinator the **SUNDAY NIGHT** before the assignment is due.
2. Research Coordinator will collect the research, format it, assemble into a single document, post in Blackboard and the course's Facebook page, email to the client by **10AM THE MORNING OF CLASS** so they will have enough time to review before visiting class, and bring a copy for each student to class.

Measuring Success: Vision Story and Lifestyle Scenarios reflect the expected conditions in the marketplace five years into the future. Solutions solve the problem, fall within the guidelines indicated by the research, are empirically supported, communicated well and concise.

Client Question & Answer and Brainstorming Visit to the Class

The client will attend the class for 1 hour to discuss the students' Analyses, answer their questions, and brainstorm follow-on ideas as they emerge.

Final Presentation (Groups)

Groups will formulate and communicate their recommendations in a formal presentation on the last day of class to the client and other visiting guests, distributing a Handout for Decision-Makers at the end.

Deliverables:

1. **Joint Overview (10 minutes):** The class will begin with an introduction of invited guests and an overview of the engagement so the guests' valuable experiences can be made accessible through knowledgeable participation. Groups will collaborate to create and present the introduction.
2. **Each Group (25 minutes of presentation time followed by Q&A):** will then, in turn, introduce its members, discuss the applicability of their skillsets, give their presentation and distribute their handout.
 - a. Recommended Frames
 - i. Vision Story
 - ii. Motivational Strategy
 - iii. Two Lifestyle Scenarios
 - iv. Channel Matrix
 - v. Capabilities List: A list of all of the additional skills, tools and equipment necessary to execute the solution
 - vi. 5-Year Financial Analysis: Illustrating the cost of implementing the changes contemplated and the sources of offsetting cashflows that prove these to be wise investments
 - vii. Implementation Plan: high-level plan showing the steps involved in implementing your solution (simple Gantt chart)
 - b. Handout for Decision-Makers
 - i. A one-page, single-sided handout that will include: a) recap of the findings, b) the questions the JLC will need to answer to validate the group's assumptions, and c) next steps. (This document will be the roadmap/dashboard the JLC Board of Directors will use to administer the implementation of your plan.)

Empirical Support, Risk Mitigation

It is very risky, and often costly, for an organization to embrace a new course. To provide comfort to decision-makers, the group will provide empirical data to support their recommendations, as well as a list of potential risks to implementation with an associated strategy to mitigate each risk.

Measuring Solution Success

Your group's solution will be considered a success if it:

1. Describes how telling the JLC story will become a part of the lives of its members.
2. Delivers compelling reasons for members to participate in this activity.
3. Yields a healthy, self-supporting, self-sustaining, self-optimizing, growing organization that can view its overhead expenses as highly successful strategic investments.
4. Provides the data and measures necessary to build a dashboard by which the organization can track ongoing success.

Measuring Presentation Success

This presentation will be considered a success if:

1. Students demonstrate a holistic understanding of the organization in the context of its environment.
2. Everything that is necessary to achieve the solution, and no more than is necessary, has been included in the presentation.
3. Specific, actionable recommendations are defined and supported by empirical data.
4. A realistic financial analysis is provided.
5. Recommendations are sensible, affordable, well thought out and correctly scaled for this organization at this stage of its development.
6. Concepts are communicated well, questions handled well.