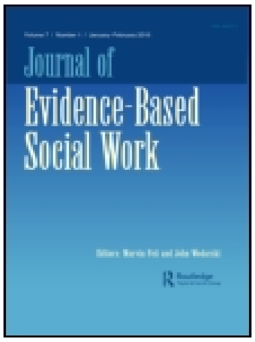

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OVERVIEW

Growth and Resilience of Pioneering Nonprofit Human Service Organizations: A Cross-Case Analysis of Organizational Histories

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Knowledge of organizational history is important for recognizing patterns in effective management and understanding how organizations respond to internal and external challenges. This cross-case analysis of 12 histories of pioneering nonprofit human service organizations contributes an important longitudinal perspective on organizational history, complementing the cross-sectional case studies that dominate the existing research on nonprofit organizations. The literature on organizational growth, including life-cycle models and growth management, is reviewed, along with the literature on organizational resilience. Based on analysis of the 12 organizational histories, a conceptual model is presented that synthesizes key factors in the areas of leadership, internal operations, and external relations that influence organizational growth and resilience to enable nonprofit organizations to survive

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and thrive over time. Both cross-sectional and longitudinal examples from the organizational histories illustrate the conceptual map. The paper concludes with a discussion of directions for future research on nonprofit organizational history.

KEYWORDS *Nonprofit, organizational history, growth, resilience, human services*

"Progress, far from consisting in change, depends on retentiveness ... Those who cannot remember the past are condemned to repeat it."— George Santayana (1905)

INTRODUCTION

The call for attention to the importance of history is particularly important for organizations and the individuals who lead them, as the past inevitably influences an organization's present and future. Business scholars cite knowledge of organizational history as important for understanding the context in which a business operates, recognizing patterns in successful and unsuccessful decision-making, and learning the limits of how managerial decisions can direct organizational change. In fact, much business administration training focuses on analysis of case studies, a form of organizational history (Kantrow, 1986). An organization's history has a particularly strong influence on organizational culture, so that understanding and building from history is an important strategy for achieving desired changes within an organization (Wilkins & Bristow, 1987). More broadly, knowledge of organizational history can promote effective and efficient decision-making, facilitate ongoing and new operations by providing a familiar structure recognized by leaders and employees, and promote particular political agendas within an organization through the selective filtering of information from the past (Walsh & Ungson, 1991). These ideas about the importance of organizational history have mostly been developed within the context of for-profit businesses, but they apply as well to nonprofit organizations (Austin, 1996).

An organization's history can be difficult to untangle. Organizational history or "memory" is stored within an organization in various locations, ranging from the memories of individual employees, to the rules and norms of the organizational culture, to the hierarchical structures of staffing and programs, to the physical layout of workplaces, to the patterns apparent in ongoing operations and processes by which change is implemented. In addition, external documents and individuals retain certain aspects of an organization's history (Walsh & Ungson, 1991). Given the value that can be gained from understanding an organization's history, the directors of nonprofits have been urged to proactively document organizational events and preserve materials that have future historical value (Barbeau & Lohmann, 1992).

Despite the recognized educational value of studying the history of organizational development and change over time and in context (Kantrow, 1986), most documentation of organizational history reflects time-limited cross-sectional case studies of mature organizations, centered around one or two key events or decisions, rather than more holistic examination of organizations from the time of their founding through many years of operations (Kimberly, Miles, & Associates, 1981). Thus this analysis aims to fill this gap by documenting and analyzing the histories of a set of pioneering nonprofit organizations across their lifespans, beginning with the establishment of these organizations between 20–150 years ago, and continuing through the present. By presenting a longitudinal view of organizational history over multiple decades, this analysis identifies patterns and themes that emerge as nonprofit organizations grow and change over time.

METHODOLOGY

To explore the issue of nonprofit organizational history from a holistic and longitudinal perspective, a series of organizational histories of human service nonprofit organizations was compiled as part of the Mack Center on Nonprofit Management in the Human Services at the University of California, Berkeley, School of Social Welfare. Twelve organizational histories were completed in 2007 and 2008. These histories were researched and written by graduate Mack Center Fellows who were selected based on their scholarly achievements and interest in nonprofit organizations.

Organizations were selected on the basis of several criteria: a human services mission, location in the San Francisco Bay Area, a minimum 20-year existence, diversity of clients served, size of budget (from under $1 million to over $20 million), and a willingness to participate by facilitating data collection. Each organization signed a Memorandum of Understanding that granted permission for the Mack Center to publicly share the completed and agency-approved organizational history. Mack Center Fellows worked closely with an agency contact person to locate important historical documents (e.g., board meeting minutes, newsletters, agency memos, etc.) and identify individuals to be interviewed (such as past and current board members, past and current employees, and executive directors). Agency contacts also facilitated agency review and approval of the completed histories.

Data collection for each organizational history was relatively unstructured, following a traditional qualitative case study research design (Firestone & Herriott, 1984). The Fellows conducted interviews and analyzed organizational records to gain an understanding of the life of the organization over time. Some had access to a wide selection of historical materials, such as agency publications, media coverage, and documents that had previously detailed the history of the organization. Others relied mainly on in-person and telephone interviews with key individuals from the organizations' present and past. An informal interview guide was provided to the Fellows; however, they were encouraged to develop interview questions based upon their review of agency documents and discussions with key informants. Most histories were compiled using a combination of document analysis and information from interviews. All Fellows also collected financial data to create an historical budget trend line for the organization. Fellows were not given a pre-set structure for describing their findings, but rather developed individual strategies for presenting the organizational histories in detailed narrative format, in some cases with supporting visual displays and data appendices.

The process of researching and writing each organizational history took approximately three to nine months. Once the narrative history descriptions had been completed and reviewed by the Mack Center Director, copies were sent to the executive directors of the respective agencies for review and comment. Recommended changes were returned to the Mack Center, and final edits were made. Each agency then received a copy of the final organizational history. The organizational histories in this volume are condensed versions—the full versions that are available on the Mack Center website (www.mackcenter.org).

The next step in the research process was the cross-case analysis of the twelve organizational histories. The major challenge in a multi-case analysis is balancing the need to identify cross-cutting themes and generalize findings across multiple cases without sacrificing nuanced attention to the uniqueness of individual cases (Firestone & Herriott, 1984; Stake, 2006). For example, over time, each organization changed in structure, leadership, programs, and other characteristics, often radically, adding a layer of differences within each case in addition to the differences between cases.

The senior author, who had researched and compiled one of the organizational histories, took the lead in the cross-case analysis based on the final narrative descriptions of each organization's history. Each case was examined for key themes that reflected concepts derived both deductively; from a review of the literature related to organizational change over time, and inductively; from themes that emerged from a thorough review of each history. The analysis proceeded through a combination of strategies that included identifying themes that cut across cases and examining the ways that themes played out in individual cases (Miles & Huberman, 1994). The resulting conceptual model was discussed and refined with the co-authors, who had detailed knowledge of the compilation of the twelve histories (Firestone & Herriott, 1984).

ORGANIZATIONAL HISTORY: A BRIEF LITERATURE REVIEW

Organizational Growth

Much of the existing research related to organizational history focuses on patterns of organizational growth. Defined broadly, growth represents how organizations expand their capacities or scope of activities or clients. Growth typically involves proactive action, and it often takes place as a result of deliberate planning and/or active response to external opportunities. Two key themes in the literature on organizational growth relate to lifecycles and the management of growth.

Organizational lifecycles. Many organizational researchers have studied organizational lifecycles, or patterns in the ways organizations tend to grow over time. Several different lifecycle models have been proposed, most developed with for-profit businesses in mind. One of the most frequently cited business lifecycle frameworks was developed by Greiner (1998), who describes the evolution of businesses over time as following a five-phase process, each of which culminates in a crisis that leads to the next stage, as follows:

- *Phase 1: Creativity* is the phase when the focus is on creating a product and a market, with little attention to formal or routine organizational tasks. The crisis arises when it becomes clear that more formal organizational management is needed.
- *Phase 2: Direction* comprises growth through formal processes such as job specialization and performance evaluation. The crisis in this phase results from employee frustration with formalized processes that stifle flexibility and prevent localized decision-making.
- *Phase 3: Delegation* requires new leadership to give employees more autonomy to make decisions. The crisis arises when the push toward decentralized decision-making leads to a need for increased coordination.
- *Phase 4: Coordination* is the phase at which management imposes coordination structures and requires employees to justify their autonomous decisions through documentation. The crisis emerges when line staff begins to resent the increasingly burdensome requirements of paperwork and reporting.
- *Phase 5: Collaboration* involves the development of cross-department teams to allow coordination without excessive documentation requirements. This renewed emphasis on teamwork can help a mature organization return to the benefits of creativity that were prominent in Phase 1.

Miller and Friesen (1984) synthesize Greiner's five-phase model with lifecycle frameworks developed by other organizational scholars, developing a common typology of stages of organizational development that closely parallels the model developed by Greiner. The stages include *Birth* (similar to Greiner's Phase 1: Creativity), *Growth* (similar to Phase 2: Direction combined with Phase 3: Delegation), *Maturity* (similar to Phase 4: Coordination), *Revival* (similar to Phase 5: Collaboration), and a final stage not explicitly included in Greiner's model, *Decline*, in which businesses stagnate and begin to fail due to external challenges and internal lack of innovation. Empirical research conducted to explore the validity of this framework found that businesses seemed to follow the model, but did not always proceed through the stages in the prescribed sequence (Miller & Friesen, 1984). Similar summaries and syntheses of several sequential organizational lifecycle models are presented by Cameron and Whetten (1983) and Quinn and Cameron (1983).

Other researchers have explored the application of business lifecycle models specifically to nonprofit organizations, considering nonprofits in general (Santora & Sarros, 2008), higher education organizations (Cameron & Whetten, 1983), emerging nonprofits (Bess, 1998), family advocacy organizations (Koroloff & Briggs, 1996), Jewish communal service organizations (Austin, 1996), and social change nonprofits (Strichman, Bickel, & Marshood, 2008).

Stevens (2001) developed a detailed organizational lifecycle model specifically designed to represent nonprofit organizations, drawing on models developed for for-profit businesses such as Greiner's five-phase framework as well as Erikson's psychosocial stages of human development. This seven-stage nonprofit lifecycle model comprises:

- *Stage 1: Idea:* An individual or small group of individuals has an idea and feels a personal mandate to fill a community need. No formal nonprofit organization yet exists.
- *Stage 2: Start-Up:* The organization starts operations with a focus on mission and passion but with little focus on governance, systems, management, or sustainability.
- *Stage 3: Growth:* Mission and programs become well-established in the community, but demands for service exceed organizational capacities.
- *Stage 4: Maturity:* The organization functions smoothly and has a strong community reputation for providing needed high-quality services.
- *Stage 5: Decline:* Services are no longer meeting community needs, innovative decision-making stagnates, and declining demand results in reduced revenue and operating budget shortfalls.
- *Stage 6: Turnaround:* The organization takes decisive action to regain community respect and rebuild the revenue base. Successful completion of the Turnaround stage enables the organization to return to the Growth phase.

- *Stage 7: Terminal:* Lacking the purpose, energy, and will to exist, the organization self-terminates. When Decline fails to result in Turnaround, or when Turnaround fails to revive the organization, the Terminal stage follows.

The model proposes that organizations tend to proceed through the stages in sequence. However, organizations may not progress through all of the stages, and may even skip some phases or become stalled in a particular stage (e.g. Start-Up) or comfortably established in another phase (e.g. Maturity) rather than proceeding further.

Researchers and practitioners have used lifecycle models in a number of ways: to suggest models for diagnosing and solving lifecycle problems, such as the failure to progress to the next evolutionary stage (Adizes, 1979; Stevens, 2001); to demonstrate the need for shifting criteria of organizational effectiveness over time (Cameron & Whetten, 1981; Quinn & Cameron, 1983); and to prescribe strategies for aligning organizational leadership and resources with needs specific to an organization's stage of development (Bailey & Grochau, 1993). Others have examined nonprofit organizational lifecycles from the perspective of the board of directors (Dart, Bradshaw, Murray, & Wolpin, 1996; Wood, 1992).

Managing organizational growth. Organizational growth creates both opportunities and challenges for nonprofit organizations. In many cases, growth is a positive change because the increase in the agency's budget makes it possible to employ more staff, expand locations, develop and implement new programs, and reach a broader constituency. Despite the perception that organizational growth is a positive step forward, in some circumstances growth can have disastrous effects on an organization, particularly when it is rapid and unplanned, not consistent with the organizational mission or current realities, and devoid of any strategic planning or management (Connolly & Colin–Klein, 1999).

Although the models explaining nonprofit organizational growth continue to be examined, there is a general consensus that growth needs to be managed appropriately in order to achieve long-term positive outcomes for an organization. To successfully manage and guide organizational growth, an agency needs to have a strong governance structure in place and an effective leader working in collaboration with the board. As with any organizational change, growth can bring about multiple management challenges that include developing effective supervision, changing the role of management, and delegating authority and responsibility (Phelps, Adams, & Bessant, 2007).

The first step in approaching organizational growth is to develop a plan to manage the changes that the organization is experiencing or plans to experience. Such situations include an expected change in resources, the development of new programs, the establishment of new locations, or other consequences associated with growth. Agency leaders are responsible for identifying the specific changes that the growth will bring, embracing these changes, and sending a positive message to employees and the community about the impending growth. One approach to change management is identified as strategic issue management, a focused approach to responding to changes in the environment and in the organization (Edwards & Eadie, 1994). This involves early diagnosis of and response to organizational problems that will need to be addressed in order to guide effective growth.

A particular issue that organizational leaders often encounter during periods of growth is the management of people. Attention to human resource issues is a critical component of growth management. Managers need to be aware that organizational growth challenges staff to move beyond their comfort zones, assume new responsibilities, and sometimes operate in unfamiliar settings (Connolly & Colin–Klein, 1999). Sometimes organizational growth involves expansion into different geographic regions, which can make it more difficult to identify human resources issues early and implement preventative management strategies (Phelps et al., 2007). Organizational leaders can avoid problems in this area by having a solid understanding of the organization, its environment, its workers, and the change management literature.

Another commonly experienced change management challenge involves mission integrity. Although the mission and vision of a nonprofit organization may change over time, organizational leaders need to assure stakeholders that the new directions are well-planned and do not lead the organization far from the original mission and values (Edwards & Eadie, 1994). In a similar vein, organizational leaders need to initiate an environmental scan and internal resource assessment to identify stakeholders who may positively or negatively influence the organizational growth effort (Edwards & Eadie, 1994). The early identification of these environmental factors provides the organization with ample time to either cultivate collaborative relationships or develop a planned response to those who may challenge the organization's mission and vision. Networking with other organizations and constituents has been shown to improve the performance of nonprofit organizations in multiple ways including providing access to information that can help organizational leaders gain control over their environment and effectively manage change (Galaskiewicz, Bielefeld, & Dowell, 2006).

Although the literature on managing nonprofit organizational growth is limited, there is a general theme that growth needs to be strategically planned and managed in order to have positive outcomes. This is in line with a growing literature addressing the management of organizational change and the important role of nonprofit governance and leadership structures in facilitating and guiding successful organizational change.

Organizational Resilience

Another key aspect of organizational history, and a counterpart to growth, is organizational resilience. Resilience represents an organization's ability to survive in the face of an unexpected crisis or challenge. In contrast to the more proactive nature of growth, where an organization seizes opportunities for expansion, resilience corresponds to an organization's reactive response to crisis.

Resilience can be defined in a variety of ways. A useful definition of organizational resilience is provided by Horne and Orr (1998):

> Resilience is a fundamental quality of individuals, groups, organizations, and systems as a whole to respond productively to significant change that disrupts the expected pattern of events without engaging in an extended period of regressive behavior. (p. 31)

Thus resilience comes into play when an organization must navigate an unexpected challenge without losing ground in its efforts to make progress. Resilience has also been described as positive adaptation in the context of adversity (Luthar, Cicchetti, & Becker, 2000) and the ability to absorb disturbance and undergo change without losing essential structure and function (Walker, Holling, Carpenter, & Kinzig, 2004).

Resilience research originated with investigation of individual resilience. Some common factors associated with resilience on an individual level include an understanding and acceptance of reality, a belief that life is meaningful, and an ability to improvise (Coutu, 2002; Werner, 1993). Individual resilience is influenced by the characteristics of individuals, their families, and their social environments (Luthar et al., 2000).

Similar factors have been found for resilience in organizations. Resilient organizations recognize and accept the reality (including unavoidable ambiguity) of problems and contexts; have organizational values that create meaning; embrace improvisation and inventive problem-solving; implement effective systems of communication; and invest in forward-looking experiments (Coutu, 2002; Weick, 1996; Hamel & Valikangas, 2003).

A number of practices may help organizations foster resilience, including: (a) promoting relationships and linkages between individuals and departments, (b) dedicating adequate resources to future-focused programs, (c) communicating relevant information, (d) adopting improvisation as a routine problem-solving strategy, (e) considering the impact of change on employees, (f) constantly monitoring the environment, and (g) approaching organizational disruption and strain as opportunities rather than threats (Horne & Orr, 1998; Horne, 1997; Mallak, 1998; Vogus & Sutcliffe, 2007). Creating a resilient organization is not a one-time activity, but rather requires continual awareness of the inevitability of expected and unexpected challenges and an ongoing commitment to invest in building the organizational capacity to respond constructively to disruption (Hamel & Valikangas, 2003; Vogus & Sutcliffe, 2007).

BUILDING A CONCEPTUAL MAP TO ANALYZE ORGANIZATIONAL HISTORIES

Through a review of the literature and an analysis of the collected organizational histories, key themes were identified and synthesized, leading to a conceptual model of factors that contribute to the thriving and surviving of nonprofit organizations over time. This conceptual map is illustrated in Figure 1.

In the top half of the figure appear the two key themes of *organizational growth* and *organizational resilience*. *Growth* is dominant during periods when an organization is expanding its services, clients, or capacity. Typically growth entails proactivity, as an organization actively seizes opportunities in the external environment for expansion or deliberately plans and carries out expansionary activities. Examining growth over time, organizations typically progress through a series of *lifecycle stages*, each entailing a new expansion of internal and/or external capacity. The nonprofit lifecycle model developed

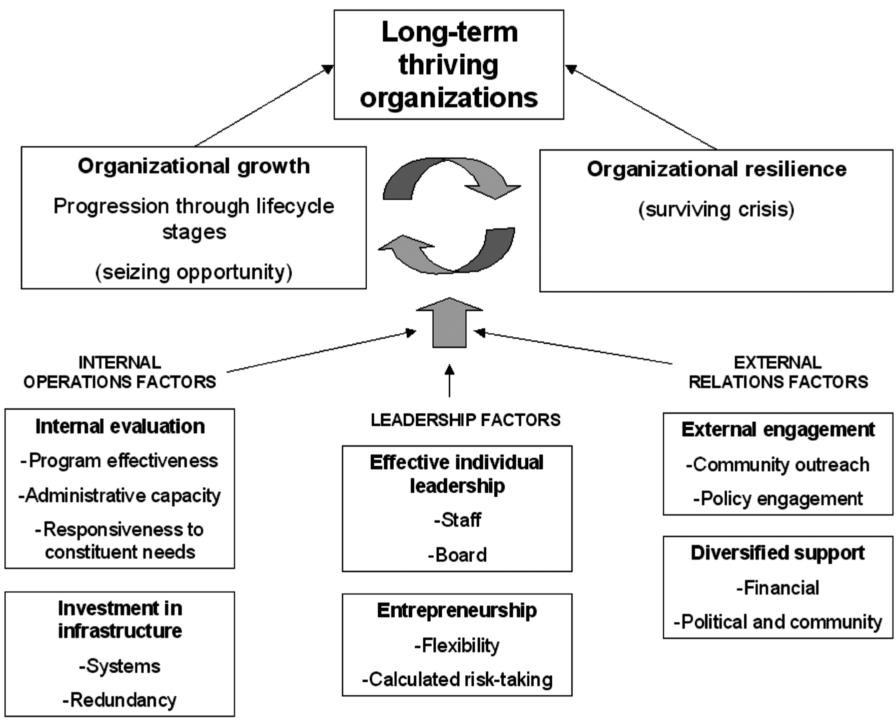

FIGURE 1 Key concepts for understanding the organizational histories of pioneering nonprofit human service organizations

by Stevens (2001) is helpful for conceptualizing the sequence of growth phases experienced by many nonprofit organizations.

The counterpart to growth is organizational *resilience*, which dominates during periods of time when an organization is responding to and recovering from a crisis or challenge. In contrast to the proactive nature of growth, time periods dominated by resilience entail reactivity, as an organization is forced to respond to a usually unanticipated event or circumstance. Resilience represents an organization's ability to survive such challenges.

Over the lifespan of a nonprofit organization, periods of proactive growth alternate with periods of reactive resilience. This back-and-forth relationship between growth and resilience is represented by the double arrows linking the two concepts on the conceptual map.

To *thrive over the long-term*, both growth and resilience are necessary. An organization must develop and/or seize opportunities to grow in order to progress through the lifecycle stages from start-up to maturity. However, an organization's growth can be interrupted by unexpected challenges that may threaten to stall growth activities, push the organization's developmental progress backward, or even endanger the very survival of the organization. When faced with an unexpected crisis, an organization needs to draw on resilience and successfully navigate the challenge to survive and return to a focus on growth.

A variety of organizational factors contribute to an organization's capacity for growth and resilience over time. These factors appear on the lower half of the conceptual map, grouped into three broad categories: *leadership factors*, *internal operations factors*, and *external relations factors*.

Leadership factors are often central to facilitating growth and resilience, and are thus placed in the center of the lower half of the figure. One of these factors is *effective individual leadership*, which comprises both leadership by *staff* and leadership by the *board of directors*. The other factor is the leadership style of *entrepreneurship*, especially the components of *flexibility* and *calculated risk-taking*.

Internal operations factors are also important for enabling successful organizational growth and resilience. *Internal evaluation* comprises activities designed to assess the adequacy and effectiveness of organizational structures and activities, and includes evaluation of *program effectiveness*, *administrative capacity*, and *responsiveness to constituent needs*. Another important internal factor is *investment in infrastructure*, including both establishment of organizational *systems* and the deliberate development of *redundancy* in resources, leadership, and operations so that the loss of one component in any organizational area does not threaten the organization's overall functioning.

Finally, *external relations factors* are vital to long-term organizational growth and resilience. *External engagement* generates community stakeholders to support an organization. This concept includes both *community out-*

reach (e.g., through the media or volunteer opportunities), as well as *policy engagement* (e.g., active response to or efforts to influence public policies that affect the organization). Another important external factor is *diversified support*, including a variety of *financial* resources as well as *political and community* support from a broad range of groups and individuals.

Each of these factors related to leadership, internal operations, and external relations contributes to an organization's ability to seize opportunities for growth and exhibit resilience in the face of challenge. Some successful organizations demonstrate strengths in all of these areas, while others show strengths in only some of them. Furthermore, over the history of an individual organization, the vitality and importance of individual factors emerges and recedes, with a period characterized by strong staff leadership, for example, followed by a period characterized by weaker leadership but strong external engagement. Thus all factors need not be present simultaneously and continuously for an organization to survive and thrive. However, each factor contributes to growth and resilience, and some or all may be necessary at any given time in an organization's lifespan to enable the organization to continue to succeed over the long-term. An organization seeking long-term, sustainable success, therefore, needs to attend to and invest in each of the three areas of organizational functioning.

Specific examples from the organizational histories examined in this study illustrate the relationships between growth and resilience and the presence of organizational factors related to leadership, internal operations, and external relations. Each of the concepts in the conceptual map is illustrated by specific examples from one or more of the organizational histories. The final example demonstrates how the different concepts and factors play out over time within the history of a single organization.

ANALYSIS OF ORGANIZATIONAL HISTORIES

The nonprofit organizations included in this study represent diverse missions, constituencies, and histories as noted in Figure 2. All are human service organizations located in the San Francisco Bay Area, but their ages range from 20 to more than 150 years old, and over time each organization has experienced a unique combination of internal and external forces that have shaped the organization's history. Nonetheless, some common patterns are apparent in the histories of these nonprofits, demonstrating key factors influencing their organizational growth and resilience over time.

Growth

During the time periods of organizational growth, each of the different leadership, internal operations, and external relations factors can play an

Exemplars of Leadership
Unity Council
Girls Inc. of Alameda County
BANANAS
Coleman Advocates for Youth and Children

Exemplars of Internal Operations
CompassPoint Nonprofit Services
Larkin Street Youth Services
Asian Community Mental Health Services
Black Adoption Placement and Research Center

Exemplars of External Relations
Shelter Network
Jewish Family and Children's Services
On Lok
Bayview Hunters Point Foundation for Community Improvement

FIGURE 2 Themes and exemplars from nonprofit organizational histories

important role in promoting an organization's success in expanding programs, services, or capacities. Examples from the organizational histories below illustrate many of these factors.

Leadership factors: strong staff and board leaders. An example of how effective leadership by staff influences the growth of a nonprofit can be found in the history of Girls Inc. of Alameda County (Terrazas, Schwartz, & Austin, 2009). Pat Loomis was hired as the agency's executive director in 1977, beginning a 30-year tenure. Loomis was a forward-thinking leader who pushed the existing boundaries of the agency and propelled it into new arenas of funding and programming. Her strong personal leadership qualities enabled her to handle ideological differences with long-standing board members, successfully lobby the United Way to give Girls Inc. the same level of funding that Boy's Clubs received, rally internal support and external funding to extend services to minority girls from outside the agency's original service area, and initiate a successful annual campaign to develop unrestricted funds. Ultimately, Loomis's leadership allowed Girls Inc. to expand its client base, increase its resources, and develop new programming to meet the diverse and changing needs of the community.

Another key factor related to the successful growth of a nonprofit organization is effective leadership by the *board of directors*. One example of effective governance is found in the history of Jewish Family and Children's Services (JFCS) (Schwartz & Austin, 2009a). In the early 1980s, the Board of JFCS initiated a series of conversations about the state of the organization and its vision for the future. As a result, the Board made several significant decisions, including closing a costly residential treatment facility and re-defining the agency's relationship with the Jewish Community Federation by reducing dependence on funding from the Federation. The Board also decided to develop a strategic plan to guide the agency's diversification of funding and made the difficult decision to replace the existing executive director with someone who had a fresh vision for the agency's future. These decisions proved to be extremely forward-thinking and helped propel the organization to achieve a level of success, growth, and independence that was unusual in the political, economic, and social climate of the 1980s and beyond.

Leadership factors: entrepreneurial flexibility and risk-taking. Nonprofit organizations grow successfully when they exhibit entrepreneurial *flexibility*. This flexibility is demonstrated by their reactions to external pressures and ability to develop programming to meet changing community needs. CompassPoint Nonprofit Services offers an example of how a nonprofit can develop and tailor services to meet changing needs (Eschman, Schwartz, & Austin, 2009). In the 1980s and 1990s, as nonprofit human service organizations were struggling to accommodate growing accountability requirements and reductions in public and private financing, CompassPoint created fee-based workshops for nonprofit staff that focused on strategies for addressing these stressors. The workshops enhanced CompassPoint's reputation as a management assistance organization that provided a valuable resource to nonprofits, while also generating a critical new funding stream for the organization.

Entrepreneurial nonprofits also engage in *calculated risk-taking* behaviors in pursuing growth related to developing new programs, implementing leadership changes, and increasing long-term administrative and programmatic capacity. The Unity Council made several decisions to pursue projects that initially posed risks to the organization (Orozco, Schwartz, & Austin, 2009). One of the agency's first calculated risks was to take on a project to construct and manage an affordable housing complex for Latino families when the agency had little experience in housing development. By bringing in development experts to help direct the project, Unity Council was able to complete the complex on time and within budget, and the project's success was an important factor in the decision by a national foundation to expand support for Unity Council's programs.

Internal operations factors: program evaluation and needs assessment. By implementing internal *program evaluation* efforts, nonprofit organizations can determine whether their programs are effective, leading to identification of opportunities for programmatic growth. Larkin Street Youth Services provides an example of growth propelled by program evaluation (Farrar, Schwartz, & Austin, 2009). In the early 1990s, Larkin Street undertook a strategic planning process that included substantial input from youth clients about the effectiveness of the agency's existing services and about the need for other types of services. The result was a new mission statement for the agency, and subsequent programmatic expansion including increased drop-in and case management services and the extension of programs to older youth up to age 23.

Assessment of a nonprofit agency's role in the larger community can also promote successful growth, by identifying unmet *constituent needs* that the agency is capable of addressing. For example, in the late 1970s, On Lok identified a significant community need among the frail elderly for affordable housing (Lehning, Schwartz, & Austin, 2009). Although housing was not originally part of the organization's service planning goals, On Lok modified its vision, applied for and received a grant from the U.S. Department of Housing and Urban Development, and built subsidized housing for impoverished frail older adults. As another example, Asian Community Mental Health Services lobbied for and helped carry out a state-wide assessment of Southeast Asian mental health needs (Vu, Schwartz, & Austin, 2009a). The study garnered support for the organization and informed the development of new services for Southeast Asians at Asian Community Mental Health and among mental health service providers throughout the nation.

Internal operations factors: infrastructure systems and redundancy. Nonprofits that grow successfully demonstrate a commitment to investing in their infrastructure by developing *systems* that help them manage growth effectively. For example, Black Adoption Placement and Research Center recognized an opportunity to expand the number of African American families certified as qualified for adoption by replacing their informal family assessment process with new clinical systems that would more effectively document the strengths of families (Schwartz & Austin, 2009b). Black Adoptions implemented new family interviewing instruments supported by intensive staff training, including role playing and field coaching, ultimately enabling the agency to increase the number of families qualified for adoption.

Redundancy in agency infrastructure can also support nonprofit organizational growth. For example, BANANAS was founded by a group of mothers with the leadership structured as a collective in order to make decisions by consensus (Vu, Schwartz, & Austin, 2009b). While this form of group-based agency management provided multiple leaders, it also presented some challenges, as decision-making was often a lengthy and heated process, but the equal inclusion of many individuals with a variety of perspectives in the agency leadership promoted robust debate and thoughtful choices about program management and directions for growth.

External relations factors: community and policy engagement. Engagement with the community is an important component of nonprofit growth and development. All of the nonprofits included in this study emerged in response to an identified community need, and most maintained strong relations with their external communities. For example, from the time that Bayview Hunters Point Foundation for Community Improvement was founded, the agency's Board of Directors and Advisory Task Force were largely comprised of well-respected members of the Bayview community, providing the agency with a direct connection to community needs and opportunities for program growth (Joe, Schwartz, & Austin, 2009). Bayview Hunters Point Foundation also proactively cultivated strong relations with key San Francisco city leaders and maintained a reputation for community-centered services, thus facilitating the agency's growth through contracts with San Francisco government agencies.

Policy engagement plays another important role in nonprofit growth and development. By responding to and actively influencing local and national policy decisions, nonprofit organizations can create opportunities for programmatic and funding growth. Coleman Advocates for Youth and Children, for example, took an active role in seeking to influence city policy by advocating for a Children's Budget that would expand resources for services for children and families (Carnochan & Austin, 2009). Their success led to increased funding for Coleman Advocates and numerous other agencies city-wide, and directly spawned new Coleman initiatives including a successful effort to promote passage of a proposition to permanently set aside city funding for children's services. Another example is Shelter Network, which responded to emerging national and local policies related to services for chronically homeless adults by launching a permanent supportive housing program, resulting in new sources of agency funding and expansion into a new service arena.

External relations factors: diversified financial and political support. Developing a diverse financial portfolio helps nonprofit organizations successfully pursue growth in the face of declining resources from any single funding source. JFCS offers an example of a nonprofit whose diversified funding base contributed to sustainable growth (Schwartz & Austin, 2009a). With the agency's transition to new leadership during the mid-1980s, when public funding for social services was being cut nationally, the executive director and Board worked together to slowly reduce the agency's dependence on government grants. The agency invested resources to develop and fill positions responsible for marketing the agency and soliciting funding. Over time, JFCS developed a very successful fundraising program and fee schedule, built two social enterprise businesses, established an endowment, and purchased the agency's twelve properties, leading to much less financial dependence on government contracts and facilitating long-term sustainable agency growth.

Nonprofit organizations also support successful organizational growth by diversifying their support in terms of *political and community* connections. The leaders of On Lok were especially proactive in building connections on both sides of the political aisle, a strategy that helped to ensure continuous program funding as control of state and federal administrations changed political parties (Lehning et al., 2009).

Resilience

The same factors related to leadership, internal operations, and external relations are important periods requiring resilience, when organizations struggle to deal with crises or unexpected challenges. Examples from the organizational histories illustrate each of these factors in relationship to resilience:

Leadership factors: strong staff and board leaders. Strong leadership by senior staff is often vital for an organization to successfully survive a crisis. Unity Council offers an example of strong staff leadership facilitating organizational resilience (Orozco et al., 2009). In 1989, Unity Council faced a major organizational crisis: finances were in disarray, the organization faced a lawsuit by a creditor, community credibility had been lost, and the agency was on the verge of bankruptcy. To resolve the crisis, the Board of Directors asked Unity Council's highly respected founding executive director to come back to the agency, at first on a short-term contract, to try to get the organization back in order. Using her administrative skills, strong community connections, and personal reputation for integrity, the executive director succeeded in developing a new strategy for moving the agency forward, negotiating debt forgiveness and new funding to support operations, and re-establishing the agency's reputation in the community. Through her leadership, Unity Council survived the crisis and emerged with a new organizational vision.

Leadership by the board of directors is also an important component of nonprofit resilience. For example, Black Adoptions faced a crisis when a child who had been placed for adoption by the agency was physically abused by an adoptive parent and ultimately died (Schwartz & Austin, 2009b). As a result, the State of California suspended the agency's license and funders withheld their support pending the results of an investigation of the incident. Eventually, both the executive director and the staff member who had made the controversial placement resigned. To cope with these challenges, the board of directors of Black Adoptions embraced their leadership responsibility. They sought out new board members who would strengthen the agency, particularly individuals with professional expertise in child welfare services. One of these new members would become the next executive director of Black Adoptions, and would focus on putting systems in place to help the agency avoid similar incidents in the future.

Leadership factors: entrepreneurial flexibility and risk-taking. Resilient nonprofit organizations often approach organizational challenges using entrepreneurial flexibility by transforming problems into new opportunities. For example, Coleman Advocates for Youth faced an organizational crossroads when a major multi-year grant that had supported their largest program was set to expire (Carnochan & Austin, 2009). Though the end of the grant could have meant the end of the organization, instead the executive director and board of directors viewed the pending event as an opportunity for reflection and long-range planning. The agency emerged with a plan to continue the work that had been funded under the grant in a less intensive manner, while also shifting the organization's focus in order to play a leadership role on broader issues affecting children.

Nonprofits also engage in proactive entrepreneurial risk-taking in order to deal with organizational challenges. For example, CompassPoint (then called the Support Center of San Francisco) went through a difficult period in the early 1990s as tensions built between the local branch and its national parent agency, with which it shared an office (Eschman et al., 2009). To resolve the conflict, the local branch decided to take the calculated risk of pursuing incorporation as a separate nonprofit organization. Though this move led to increased tension with the national office over the short term, as well as greater independent responsibility for fundraising, the separation ultimately enabled the local organization to take greater control of its operations, improve staff morale, and establish a strong independent reputation for excellent programs.

Internal operations factors: program evaluation and administrative assessment. Internal program evaluation can be an effective strategy for building resilience in nonprofit organizations. For example, ongoing evaluation can facilitate early identification of problems and emerging needs and documented program effectiveness can help an agency sustain support for programs. Larkin Street Youth Services provides another example with its ongoing program evaluation and documentation of client outcomes beginning very early in the organization's history (Farrar et al., 2009). By demonstrating strong program results, the agency was able to secure both financial and community support during difficult economic times, even though they served a population that had historically been neglected by traditional social services.

Assessment of administrative systems can also be important in promoting resilience. For example, BANANAS entered a difficult period when the sister of a long-time staff member was hired and then had to be terminated due to poor job performance (Vu et al., 2009b). Tensions arose among staff over the termination, leading to poor staff morale. In reviewing the impact of this incident, the leadership of BANANAS recognized that they needed to enhance the agency's human resources systems. As a result, BANANAS created policies to address nepotism and to establish a waiting period before staff were included as full members in collective decision-making. These policies helped address immediate staff concerns and prevent similar problems in the future, enabling the organization to move past the incident constructively.

Internal operations factors: infrastructure systems and redundancy. Many nonprofit organizations build resilience and prepare for anticipated future organizational challenges by *investing in infrastructure systems*. With organizational systems in place, an agency is better able to deal with changes strategically and with minimal disruption. One example is Girls Inc., which prepared for the eventual retirement of the agency's two most senior staff members by establishing a more formalized senior management system with an expanded senior staff team (Terrazas et al., 2009). As a result of this investment in a robust institutional management structure, Girls Inc. experienced a very smooth transition when the executive director retired four years later and was replaced by a new leader hired from outside the agency.

Redundancy in leadership and organizational systems is often a key component of resilient responses to organizational challenges. An organization with multiple and overlapping human and administrative resources is less vulnerable to disaster when one resource disappears. For example, Bayview Hunters Point Foundation could have descended into crisis when the agency's founding executive director suddenly and unexpectedly passed away (Joe et al., 2009). Fortunately, the organization had built redundancy in leadership, so that other senior staff members had strong knowledge of agency operations and community relationships. Thus the board of directors was able to appoint a program director as interim executive director, and soon afterwards promote another staff member who had worked very closely with the founder as the new permanent executive director. Despite the unexpected loss of a key staff member, the organization was able to continue functioning with minimal disruption to programs.

External relations factors: policy and community engagement. The relationships that a nonprofit organization builds with its local *community* can provide important resources during times of crisis that threaten an agency's survival and success. For example, during the dot-com boom of the late 1990s, Shelter Network faced a crisis when the landlord for the agency's administrative office announced that the rent was going to be doubled (Kimberlin, Schwartz, & Austin, 2009). Drawing on its strong community relationships, the agency was able to partner with another nonprofit agency in order to jointly purchase an office building to house both organizations, and managed to quickly secure the substantial funding needed for the purchase by approaching public and private funders with which the agency had previously built strong relationships.

Engagement with local and national policy is another factor that can help an organization successfully survive a crisis. Asian Community Mental Health provides an example of proactively engaging policy in order to overcome a major organizational challenge (Vu et al., 2009a). From the beginning, the agency was committed to hiring mental health workers with the linguistic and cultural competence to effectively serve Asian-Pacific Islander clients from a variety of national backgrounds. Because there were very few formally trained Asian-Pacific Islander mental health professionals, particularly from Southeast Asia, Asian Community Mental Health relied mainly on paraprofessional staff to provide counseling and case management. However, state and county policy did not allow for reimbursement for mental health services provided by paraprofessionals, thus preventing Asian Community Mental

Health from accessing needed public funding to support the organization's programs. In response, the agency spearheaded an advocacy effort to lobby for state legislation that would allow paraprofessionals to provide state-funded mental health services. Ultimately, the legislation passed, enabling Asian Community Mental Health to transform an organizational challenge into an opportunity for increased funding for services for immigrant communities that have historically lacked access to mental health care.

External relations factors: diversified financial and political support. Nonprofits with *diversified funding sources* are able to respond to financial challenges with greater resilience if unexpected events impact one or more of their sources of financial support. JFCS, for example, built a strong and diverse funding base over a period of many years based on foundation grants, program fees, government contracts, social enterprises, and philanthropic contributions (Schwartz & Austin, 2009a). As a result, the organization was able to survive the economic downturns of the 1990s and early 2000s with minimal cuts to programs and services, while many other nonprofits struggled to stay afloat.

A diverse *political and community* support system can also help nonprofit organizations weather the storm of external factors that challenge agency operations. For example, Larkin Street grew out of advocacy efforts for homeless youth that was led by a church in San Francisco (Farrar et al., 2009). The church garnered support from members of its religious community, neighbors, and merchants and ultimately received support from the mayor, who funded a coalition to lobby and raise funds for a youth shelter and multi-service center. By including the mayor and diverse members of the local community in their early organizational development efforts, Larkin Street built a reservoir of community support for the agency. These relationships proved to be particularly valuable when a fire destroyed the agency's offices. Larkin Street was able to quickly gather donations from its supporters to fund the recovery from the fire. Moreover, media coverage of the incident helped the agency further build its base of community support by publicizing the organization's services and the needs they addressed.

A Case of Organizational Growth and Resilience over Time

While the previous examples illustrate how different organizational factors influenced growth and resilience at particular moments in the histories of nonprofit organizations, it is important to consider how these factors interrelate over time within a single organization. Throughout an organization's lifespan, an organization can alternate between periods of growth and periods of crisis that require resilience. As an organization shifts from a focus on growth to a focus on resilience and back, different organizational factors emerge and recede in strength and importance to enable the organization to seize opportunities for growth and to survive when resilience is required. The following example illustrates the operation of these dynamics in a single organization over its 20-year history (Kimberlin et al., 2009).

Shelter Network is a homeless services organization that was founded in 1987. The agency has had three different executive directors, and Shelter Network's history can be divided into three periods based on their tenures. During the tenure of the first executive director (1987–1995), growth was the dominant focus, as the agency expanded rapidly from a start-up organization with a small staff and a single site into a multi-program agency with a more professionalized staff and board. During this period, the key organizational factors that supported the agency's growth included the leadership factor of effective individual staff leadership, as the charismatic and highly respected executive director was a strong force driving the agency's explosive growth. In addition, the external factor of community engagement was vital, as close relationships with other community-based organizations and local politicians facilitated the organization's expansion.

Toward the end of the first executive director's tenure, Shelter Network experienced an unexpected crisis when a convicted child molester and murderer was discovered to have stayed in one of the agency's shelters, resulting in intensive negative publicity. Growth halted, and the organization entered a period of intense focus on survival and resilience. Again, the key factors of effective staff leadership and external engagement helped Shelter Network survive this difficult period. Strong community respect for the executive director and active engagement of the board of directors helped Shelter Network convince local politicians that the agency could be trusted to continue operating in the community, and a proactive approach to engaging the media helped the agency control the damage from the negative publicity.

Shelter Network's second executive director took over the leadership of the organization from 1995–2001. The beginning of this period was dominated by administrative growth, as the agency expanded its technological and fundraising capacities. Key organizational factors sustaining this growth included the internal operations factors of administrative assessment and investment in new infrastructure systems.

Then an unexpected challenge emerged when county officials approached Shelter Network with a request to open an emergency shelter, a project that the agency had previously determined not to be financially feasible. At the same time, the landowner for one of Shelter Network's sites announced the intention to evict the agency from the leased site unless Shelter Network could raise the funds to purchase the land. Resilience was required as Shelter Network considered possible responses to these dual challenges. Drawing on the leadership factors of strong staff and board leaders and entrepreneurial risk-taking, Shelter Network developed an ambitious plan to both open an emergency shelter and purchase the leased site by launching a multi-million dollar fundraising campaign. Thus the crisis that led to a need for resilience was transformed into an opportunity for growth. Over the next few years, Shelter Network focused on growth and implemented the capital campaign, ultimately exceeding the fundraising goal and completing the planned projects.

The third executive director of Shelter Network began her tenure in 2001, at the start of an economic recession that threatened both the organization's ongoing funding and the viability of a new major capital project for which fundraising had already begun. Faced with a need for resilience, Shelter Network drew on the strong leadership of the board of directors (as well as the external relations factor of diversified support) to sustain sufficient funding for both ongoing operations and the capital project within a difficult fundraising environment. Shelter Network emerged from the crisis strengthened and successfully completed the capital project. As a result of the crisis, it had built a stronger and more diverse base of support that allowed the organization to enter a new phase of growth characterized by increased collaboration and new program models.

DISCUSSION AND IMPLICATIONS

By focusing on longitudinal data that encompass 20 to more than 150 years of organizational history, the mapping of the organizational histories of pioneering nonprofit human service organizations helps to fill an important gap in the research on nonprofits, complementing the cross-sectional and time-limited case studies that dominate the existing research. Furthermore, the cross-case analysis of twelve different organizational histories provides a broader view of patterns in growth and resilience over time than is possible through a single case study.

This analysis of organizational histories provides evidence for the life-cycle models of nonprofit growth. Moreover, the data support a conceptual model of factors related to leadership, internal operations, and external relations that are important for nonprofit organizations to survive and thrive through alternating periods of growth and resilience over time.

Additional longitudinal research on the functioning of nonprofit organizations is needed to refine and further develop this preliminary model. Such research could examine whether the conceptual model and organizational factors apply across organizations with distinct programmatic, geographic, or constituent characteristics and for organizations founded at different times. Cross-case research on organizations with similar characteristics (e.g., mission, constituents, founding date) could help refine the model by focusing on specific fields of practice (e.g., mental health, youth development, aging, etc.) and controlling for other sources of variation in the sampled organizations. In addition, investigating of the characteristics and evolutionary pathways of organizations that have failed to survive and thrive could help determine whether the identified organizational factors are unique to successful and long-lived organizations, and/or specifically.

Finally, organizational stages of development as outlined in lifecycle models were a secondary focus of this analysis, but further research that centers on lifecycle stages could help refine the conceptual model presented. In particular, research on organizational lifecycles could help identify the characteristics of growth and resilience that are typical for each lifecycle stage, as well as identifying the relative importance of the different organizational factors in promoting growth or resilience within distinct lifecycle phases.

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