

Collaboration

Pat Modrzejewski



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Ms. Modrzejewski has over 25 years of experience as a leader of non-profits. Prior to joining Providence in 1999, Ms. Modrzejewski served as Vice President for Development at Cal Start/West Start where she focused on Board and staff development on a national level. Before her position at Cal Start, Ms. Modrzejewski served as President of Mercy Foundation North. There, she developed and administered comprehensive fundraising programs for a geographic region that included three hospitals, located 100 miles apart.

In 1986, Ms. Modrzejewski became the Founding and Executive Director for Northern Valley Catholic Social Service. Under her direction, the agency grew from a single-site social services location to providing programs, which included housing, foster care, education, and counseling, in four counties across Northern California.

Ms. Modrzejewski has received numerous awards including “The Business Woman of the Decade,” “The Business Woman of the Year,” “Woman of Distinction Award,” and was a nominee for the “Daniel E. Koshland Award.” She received her Master of Arts degree from the University of San Francisco. She has also completed graduate work at the University of Madison; Madison, Wisconsin’s Business School.

Ms. Modrzejewski has led the efforts to raise over \$200 million since she has been at Providence.

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It is ironic that nearly all of the literature on successful business organizations cites the need for collaboration to have business, program, or model excellence. In reality, most business models are far from collaborative and in fact many only give lip service to the concept of collaboration. The leaders who do support a truly collaborative model are often regarded as weak, and even as uninspired leaders who are incapable of making important decisions. For collaboration to really thrive there needs to be a commitment in the entire organization to allow this process to work. For example the CEO and anyone serving as the face of the organization must truly believe that top down management will not get things done efficiently and in a timely manner but he or she will also find that their approaches will only have temporary impacts and truly systemic reforms may germinate but will never completely flower unless there is buy in from a critical mass of the organization. Gaining this support is far from easy and takes a great deal of time to accomplish. We have all seen organizations that leap frog from one operating belief to the next as the leadership changes.

One organization with which I was involved was deeply committed to a score-keeping model to assess progress toward financial goals. It was an incredibly successful approach where the entire leadership team worked hard to accomplish their goals. It became easier because we all knew that we would meet our colleagues face to face to discuss our level of accomplishment on a quarterly basis. The last thing I ever wanted to do was to face my colleagues with less than a successful effort. In fact, a saying developed that you would survive missing your goals once and possibly even the second go round but the third time that they were deemed inefficient or unsuccessful you would probably no longer be allowed to function within the organization. This model was developed at the behest of the CEO, and after initial resistance was accepted as a necessary component of doing business within the organization. The process was developed over a two year period and seemed to be accepted at all levels of administration. Suddenly the CEO received a promotion and moved to the company's headquarters in another state. His replacement, who had been an active member of the leadership team while the model was developed and implemented, truly lacked commitment to the process and within a relatively short time the leadership exited the score keeping practice and returned to a largely unfocussed approach to goal development and attainment.

I believe if you asked the leadership team if they had a commitment to the model they would have answered in the affirmative even though they may not have personally liked it.

The question that I have often asked myself is why did this dramatic shift occur and should something have been done to preserve it? My conclusion continues to be that the Scorekeeping model as it was implemented revolved around the personality of the leader and had not been developed in a way that the support of the staff was ever developed and rather than a collaborative model arrived at through teambuilding and discussion, had been imposed by the force of the leader and never been truly institutionalized in the organization. When the first sign of a struggle with the process occurred the new leader divorced himself from the program and allowed the non-supporters of the process to win out. The result was a return to the way that those goals had been handled previously and in my opinion much of the rigor disappeared. If the executive team had arrived at the model and had input on how to implement the process it would have been much more likely to become a viable permanent part of the organization's procedures. In short, collaboration would have had a better approach to institutionalizing a process that could withstand a change in leaders. Leaders can come and go but they will not have a profound impact on the culture of organization unless it is developed with the support of a large segment of the organization. Another concept that I have come to believe is that culture can eat process for lunch. Culture cannot be changed unless there is a commitment from a critical mass of the leadership.

In this essay, I will discuss collaboration from modern historical, sociological, and political perspectives. I will then apply it to situations with which I have been personally involved during the past several years as my organization strove to change the fundraising element of a hospital organization from a small local perspective to a more regionalized approach. This story is one of overall success but along the journey we also experienced a great deal of resistance.

The ultimate goals of collaboration are to improve the way we do things so that we can more easily accomplish complex goals.

Where did the concept of collaboration come from? If you look back historically many of the first tribal organizations were the result of collaboration. The society had needs, most often focusing on security or the attainment of necessary commodities such as food, or important living materials. Many of the early civilizations came about because the people soon realized that they could work more efficiently by combining and separating tasks. As a result of these collaborations, we developed languages for regions and cultures, writing which was necessary for the keeping of records. A prime example of writing would be the cuneiform, which was written onto wet clay tablets in the areas of Mesopotamia. Nearly all of the remaining examples of this writing were business in nature.

Elements such as religions were developed collaboratively as ideas were shared and communities with similar beliefs began to formalize them to meet their needs, perspectives and worldviews.

As this collaboration was refined villages became cities and cities became nations and nations became empires. Often laws and rules were codified to help the members of the communities understand what activities were necessary to keep the community functioning. In the Bible we have examples of Mosaic laws that were used as an organizational tool. Interestingly enough these laws were developed in conjunction with religious beliefs.

Socially, classes and ranks developed. The ancient Greeks had citizens, farmers, and slaves to differentiate their societal roles. Each role had unique characteristics and their involvement in law making and governing varied based on their roles.

In the modern era we have found collaboration in a variety of settings. The science community used a collaborative model in developing the atomic bomb in the Manhattan project. Einstein, Fermi, Teller, Oppenheimer and a plethora of other scientists were isolated in the community of Alamogordo, New Mexico and tasked with the development of a super weapon, which had the potential to bring an immediate end to World War II. Little did they or we know how their work would change society in the ensuing years. Discussions and negotiations were broadened to a worldwide level to deal with the elements they unleashed collaboratively. Much of the scientific community still uses this approach with the scientists in organizations and businesses such the Jet Propulsion Laboratory and NASA collaborating on how best to accomplish space travel and exploration.

In business, W. Edwards Deming is credited with developing a collaborative business model which essentially reinvented Japanese industry in the 1950's. This approach ultimately led to the production methods used by large corporations such as Toyota. This approach moved Japan from the junk material production level to the preeminent high materials we saw in the late 20th century. His approach, as it was adopted by the Japanese and other cultures led to the revolutionary concept that anyone in the production cycle had a valuable opinion and was given the opportunity of expressing his or her thoughts.

In the modern world we could easily discuss how the Internet and the information age drastically changed the collaborative model because myriad new ideas are available instantaneously to anyone in the world. The collaborative model becomes ever more important as new generations commonly labeled Generation X (Born 1966- 1982) or Generation Y (Born 1982 to the present) enter the business world bringing new approaches such as a belief in multiple careers. No longer are they thinking of staying in one company

but instead are always looking for their next position. Nor, are they willing to work endless hours to complete tasks. They are truly in the “me” first realm. It is more about what you can do for me rather than what can I do to make the organization work more effectively. They are also not interested in being told what to do, but rather expect to be consulted. Large new organizations such as Google and Yahoo have already set the stage in changing the work place. If American business is going to be successful it is going to have to realize that the old business assumptions that no one will ever want to leave us because we are so wonderful and that our approaches are the only games in town. Instead institutional beliefs need to be reevaluated and reinstituted in such a way that processes will be in place as the work force changes on a regular basis. In short, the old approaches are no longer valid. As my organization has taken on younger staff members these changes are becoming more and more evident and as a leader I have had to adjust my thinking about demands and even work hours with these newer groups. It is my belief that they will benefit from the concept of true collaboration. They clearly want to be heard as they face issues common to workplace demands.

In light of all of the above information, I have had the opportunity to evaluate a major structural shift we took in my organization which began in 2007 but was not implemented until late 2013.

I currently oversee the regional philanthropic efforts of a large Catholic healthcare system. In 2013 there were three established 501(c)3 foundations in our region. Each of the foundations had developed a mission driven, collaborative environment. And although we were strong compared to some other foundations, we also knew that we had to grow and increase our revenue.

The term “regionalization” or “regionalizing” as it pertained to integrating the separate Foundations’ fundraising operations for California had been a topic in discussion since 2007 but the timing never seemed to be correct.

In 2011, the idea once again surfaced and in September of that year, at the Foundations’ regional joint board retreat, a commitment was made to “regionalization.”

You might ask, why then and not later. There were multiple reasons but the theme that continued to prevail was that as the reimbursement for healthcare diminished, the need for philanthropy was vital to sustain our ministries and there were many who felt that we were currently structured in a manner that led to missing philanthropic opportunities particularly at the “mega” major gift level (\$25 million and above), at the major institutional level, and with major Catholic philanthropists.

Although we left the joint board retreat with a clear mandate to proceed with regionalization, we also knew that in order to be successful, we had to build a strong base of collaboration between our foundations. We knew that we needed to define and build a shared purpose, cultivate an ethic of contribution and create an infrastructure in which collaboration was valued. Most importantly, we had to acknowledge that developing a collaborative community is a long-term investment.

The committee composed of major stakeholders met in early 2012 and they began to “explore how one might envision a regional approach to philanthropy working.” After many months of discussion,, the committee made the recommendation that we should go forward with the coordination of services in California but that major gift fundraising must remain local and that at this point in time, we should leave the board structures “status quo.”

Since “coordinating” services often creates a sense of “uncertainty” among members of the staff, it was just as imperative that “communication” and “collaboration” be continuous and seamless with them as with our board members.

By 2013, the committee felt that through collaboration, it had reached the needed consensus to go forward with the concept. In truth, even though we were presenting a transparent process there always seemed to be a nagging concern by some that something was being hidden.

From my viewpoint the process was very open, yet, the element of doubt remained. In retrospect, while developing the collaborative piece we should have even spent more time insuring the needs of board and staff members were being met.

Soon after my appointment as the regional Chief Development Officer was finalized in the second half of 2013, I organized several all-day staff meetings with all of the fundraising staff to discuss the proposed Foundation structure. This process was essential since a large number of the staff was concerned that jobs would be omitted during the restructuring process. As these fears were expressed we worked to put them at ease stating that the goal was to keep all people even though some positions were restructured or would be reporting to different leaders. The development of a consensus which would gain the support of the staff was the main goal. We met with some success but we did have a number of naysayers who refused to accept the concept. I had to constantly remind myself that even though a consensus might be reached, approximately twenty percent of the people involved would be very supportive, sixty percent might be ambivalent initially, and the remaining twenty percent would probably be resistant. In hindsight the numbers were close to being accurate.

Although our goal was the centralization of services while increasing the number of major gift fundraisers at each of our ministries, I don't think that we ever fully took into account what this meant for some of our board members.

For some, they felt and continue to feel that they lost their identity and with that went their autonomy. They did not like having their Executive Director reporting to someone other than the board or the Chief Executive of the ministry and there were others who could not understand how standardizing some processes could reduce redundancy and improve efficiency while reducing costs because now they had a "cost" for fundraisers who had a regional responsibility (annual giving, special events, planned giving, grants, and data base management).

Almost eighteen months later, the staff and boards continue to journey together and although it hasn't always been easy, the majority of them understand the need for regionalization. In terms of revenue, the foundations had a 60% increase in year over year revenue. New philanthropic programs have been developed, campaigns have been launched and yet, a lingering resistance by some remains.

The key to some of the success has been consensus building which we handled well in some areas and not as well in others. There are so many factors and elements to consider that it is easy to underplay some and overplay others. The real question remains: Is regionalization ingrained in the fiber of the Foundation or is it a passing approach that will disappear as leadership changes occur. We have certainly attempted to use consensus building to accomplish something ultimately very positive to the organization but the key question remains is it sustainable and in our haste to grow revenues did we take the time needed to implement it? Only time will tell.

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