

5. Max Skolnik: Transforming the Value of PM for Nonprofit Organizations

00:01 Speaker 1: Okay, PMs. We know project management does a lot of good bringing common practices that are teachable and repeatable. It's an approach that gives us outputs on time, on budget, within stakeholder expectations. It may even be used to drive organizational transformation. But what if we could change the way an entire industry approaches its mission delivery?

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00:22 Speaker 2: I wanna get non-profits excited about project management because it can radically transform the way that they do their work, that there's a liberation aspect to it; that there's a freeing from this cycle of the hamster wheel of survival.

00:41 Speaker 3: From the Washington DC chapter of the Project Management Institute, this PM Point of View, the podcast that looks at project management from all the angles. Here's your host, Kendall Lott.

00:50 S1: Today, I'm speaking with Max Skolnik, the Washington DC Director of the Taproot Foundation, a national charitable organization that is engaging professionals in pro bono service to drive social change. It's a charity that helps companies and charities be better at delivering social service work.

01:09 S2: As we look at this sort of old, antiquated ways of doing social service work, the "charity", the helping people, kind of the missionary approach to doing this kind of work, it's run its course. I think we've seen in many ways how it doesn't work, that we pick a number, pick an indicator, whether it's child poverty which is relatively unchanged if not exploded here in the Washington region. AIDS cases are, as a percentage maybe going down but raw numbers are going up. So, these big, scary, complicated issues have not changed, relatively speaking, in 30 years. And all this money that we're pouring into the system hasn't really changed these indicators, or outcomes, or people's lives. What are the tools that we need to then change the narrative around the work that we're doing? And project management is just this really phenomenal way of encapsulating some of this work into really structured ways, to properly scoping these things, understanding what the needs are, the inventory of challenges that different organizations are facing, different stakeholders are facing.

02:26 S1: Well, let's go right there for a second. How does project management handle that inventory of challenges? That's more of portfolio or macro level look, so how are you associating that?

02:35 S2: To me, I think the key is prioritization. I'll go and talk to non-profits, and I'll say, "What issue is really... What project? What concern is really burning you up?" And the number one thing they'll always say is fundraising; get me money. And I think that these tools that project management can provide is ways to look at these problems and really understand what's driving

them. Maybe it's not fundraising. Maybe it's a dysfunctional board. Maybe it's your marketing team. It's the way you're telling your story. Maybe it's the way you've just structured your staff. There's so many things that can impact how you raise money, how you bring an income to your organization. But I feel like a good project team that's using these principles can understand.

03:18 S1: How did you see a project team tackling that?

03:21 S2: I think that there's a huge need within the non-profit community for an external voice, an external observation. Folks who are coming from this cross sector approach, I think that we have become so siloed, not only within our profit sector but within the specific spheres of the non-profit sector. So, youth people aren't talking to senior people. Senior people aren't talking to the job people. And we have this narrow band of what our reality is, and that obviously affects our work, that affects our relationships and someone. And very rarely switch it up. We very rarely change that perspective.

03:57 S1: It's a change of perspective.

03:57 S2: Yeah. And I think that what these external teams can do is do that in a really powerful way. We think that we're so insulated in this non-profit world. So, I see them coming in with this whole new tool set, this whole new experience that greatly benefits the work that's happening. And that ability to translate too, I think between sectors.

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04:23 S2: I think the problem is that non-profits don't have a lot of experience with these tools. So when they set up projects or set up teams, they often set them up for failure. They have the wrong expectations. They have skewed timelines. They have poor sense of scope. They don't know what success looks like. They don't know how to measure success. And so you'll often just sort of set up these cross-functional teams or different teams within departments, and they don't really go anywhere, or they'll produce something that's not very useful. So I think that there is an expertise, there's an art, there's a science to this that would be huge to bring in from the outside.

05:04 S1: So, is that the only way to get it, is bringing it from the outside? Or do you see it as... Is that the faster way to solve this problem?

05:09 S2: Ideally, we want everyone to take on these principles. In our case, they're pro-bono management principles. But you can be trained on this. You can learn these things. So I think that there's an opportunity for an education around these principles, around these tools for non-profits to then take internally, then great. Let's do it.

05:29 S1: What is your experience with project management then? You're not a certified professional yourself in it, right?

05:33 S2: No, I'm not. No, no, no, no.

05:34 S1: And have you used them before? Have you used people who have been project management professionals or professional project managers, whether certified or not?

05:40 S2: So, I've been the recipient of a large number of these sort of projects by people who were trained in these principles as a non-profit provider. So we've done a number of capacity building projects with different entities that have been immensely successful and beneficial. And we're really able to change the way that we viewed our operations, the way we viewed our fundraising, and saw ourselves as more of a sustainable entity as opposed to just this, 'Let's get to the next month, let's get to the next quarter'. And then now, as a person who sets these engagements up, I was kind of a matchmaker for this, as well. I see the power on a much larger scale. We work with several hundred non-profits here in the region, and then thousands nationwide through Taproot. And it's really extraordinary to see how these very small, scoped-out, structured projects can change operations, change behaviors.

06:34 S1: Can you give me some examples? Can we put a little meat around this?

06:35 S2: Yeah. Sure. There's one group that we've worked with is Life Pieces to Masterpieces. They work with young African-American boys, east of the river, east of DC, primarily through the arts. But they sort of are about life empowerment, about leadership, and it's about sort of breaking that cycle of dysfunction in a lot of organizations.

06:52 S1: So, how did they use the project then?

06:53 S2: They're on their fifth project with us. So they did the Salesforce project. They did sort of a demand sales force project. They did marketing. And they took what was a very rudimentary fundraising operation that was essentially the way we all just say, "I'll write a hundred letters to our supporters," or "I'm gonna put a bunch of flyers in the local dry cleaner", to a very sophisticated donor database, data-driven, looking at the benevon model, all these kinds of things to really create a much more advanced development operation for themselves. And that was done through a series of projects.

07:27 S1: Why hasn't this happened before? Why is this news?

07:29 S2: The number one reason non-profits always give for not doing these kinds of resources is that they don't even know that first step, where to go. If they don't know where to look, they don't know where to find... So there's that first obstacle that I think really stops a lot of non-profits from beginning this. The second one is that they always give is time. "We don't have time to do this". But what I think they don't have is they don't have a structure. They don't have a path. They don't have a way to integrate into that project, so it's just...

07:54 S1: So, it's not just having the project management and the project manager team. It's having it connected in to your organization. It's the bed at which it lies in.

08:01 S2: Right.

08:02 S1: And you said there might be a third reason.

08:03 S2: Third is their expertise. That they don't feel they have the requisite knowledge to talk with a team, to talk through a project, that they don't have enough to even begin to build HR capacity, for example, or development capacity.

08:17 S1: It's about the culture of the non-profit and how they operate. But part of what it sounds like your mission that you're also hitting on is actually getting them to understand the value of pro bono. So, let me change the question. What is the value of project management in the delivery of pro bono services?

08:33 S2: I think that you can get a group of people around a table and just sort of brainstorm around how to solve a challenge, but how to execute it is a very important thing. And I think we often lack the knowledge of how to secure it, the time to do it, the expertise to do it, and a project manager brings all those things. It teaches you how to scope out projects. It teaches you how to secure the right resources for the right job.

08:58 S1: At the right time. That is, if you bring them in on your schedule, at the right time.

09:02 S2: Exactly. It teaches you how to set up the lines of communications. It teaches you how to properly draft things and review things and not have endless review and have too many stakeholders and too many chefs. Like understanding [laughter] who the right people are, who need to be included in that conversation.

09:18 S1: Are you a voice in the wilderness? Is this the new wave? Are you on the front, the middle, the back?

[chuckle]

09:22 S2: No, I think...

09:23 S1: The idea that pro bono is important is one, but the second one is that one way to deliver that is to understand things in projects.

09:30 S2: There's 'done-in-a-day' type projects, there's 'team-based' projects, there's sector campaigns, there's coaching. There's lots of the different iterations of pro bono. But for the most part, people understand that you need to have these stages, these steps, to get them done. I think that's, thankfully, it's becoming pretty much the way it's done. But I wanna get non-profits excited about project management or excited about pro bono because it can radically transform the way that they do their work, that there's a liberation aspect to it, that there's a freeing from this cycle of, what I call, the 'hamster wheel of survival'. You know, that non-profits, all they can think about is the next week, the next month, the next quarter. And they're stuck.

10:21 S1: As Taproot works with non-profits who understand the value of pro bono and that pro bono services are often delivered to them and that they can find valuable if it's projectized, how can the project management community reach across the aisle or prepare to receive you?

10:34 S2: So, I think we need to create a series of encounters between these two worlds. They could be events, they could be trainings, they could be conferences, where their interaction can start to happen. Maybe it's 'done-in-a-day' type projects. Maybe it's panel presentations. What you... We make use of the interpreting intermediaries.

11:01 S1: Sounds like the boards are the place just strike there, frankly.

11:04 S2: I mean, Taproot talks about this all the time, that the boards are the leverage point, that's the tip of the spear, that if we really get boards to buy into this in a formal way and we talk about the ideas of having almost a pro bono officer. In the same way that there is a treasurer and a secretary, there's a pro bono officer, whose job it is to think about these kind of pro bono projects. One of our best practice principles is always treat pro bono as if it's a paid engagement, to bring that level of seriousness. And I've seen a number of, on both sides, non-profits who say, "These guys are just so serious, and they're so professional, and they're so corporate, but I don't like where they're going with this project, but I'm just going to keep my mouth shut because they must know what they're doing," right? So they're not treating this like a paid... They're not being a client. They're not making demands, but also they're not making suggestions and changes. They're just kind of letting it flow, which is obviously bad.

11:55 S1: They're not acting as a client. They're not being treated as a client.

11:57 S2: That's right.

11:58 S1: A little of both.

12:00 S2: So I think those kinds of issues, issues around learning. We say learning is both ways, we want the client team to get a deliverable, to get something that's useful to them. But we want the volunteers, the project people to use this to innovate their work, to go back and change their cultures in their companies. There's a lot to learn that non-profits can teach.

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12:21 S1: So, PMs, your client service still matters, and your PM tools bring the integration, standards, and discipline needed to get charity work get done, get done well, and have value in ways that are different than in the past. It's transformative, and it's an opportunity.

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12:41 S1: Special thanks to today's guest, Max Skolnick. Our theme music was composed by Molly Flannery, used with permission. Post production performed at Empower Strategies, and Tanneclam web support provided by Patomic Management Resources. I'm your host, Kendall Lott, and until next time, keep it in scope and get it done.