Engaging Ideas- Beeta Jahedi

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SPEAKERS

Intro, Dr. Beeta Jahedi, Tony Kopetchny

I Intro 00:01

Welcome to Engaging Ideas, the bi weekly podcast from Parsons TKO, bringing you conversations with mission driven leaders and luminaries to shift your perspective and challenge your assumptions on the art of the possible.

Tony Kopetchny 00:16

Hello, everybody. And welcome to another episode of engaging ideas, the Parsons TKO podcast where we like to share all kinds of ideas for you in the nonprofit and mission driven sector. Ways that we can start thinking about the new art of the possible as we're in such a moment of transformation. And today, I'm thrilled to be joined by Dr. betta, to Hetty, who is currently serving as the Chief of Staff at the Tao Foundation. Welcome betta.

D Dr. Beeta Jahedi 00:45

Hi, Tony, nice to be here. Thanks for having me as a guest on this podcast. Thrilled to be speaking with you.

Tony Kopetchny 00:52

Wonderful, I am excited to dive in. But before we get there, could you tell the audience a little bit about the top foundations?

D Dr. Beeta Jahedi 00:59

Absolutely. The top Foundation is a Family Foundation based in Connecticut, we fund in Connecticut in New York. And nationally, our endowment is about $400 million dollars and make up about 20 million a year across a range of issue areas that were important to the

family that includes everything from theater to journalism, to justice reform, to medicine, and higher education to sum that all up so a lot of great things to be have a lot of interesting projects going on at all times.

Tony Kopetchny 01:38

It's wonderful. Thank you so much. Now that's made me want to throw a question in to so curious with Tao foundation is are the is the family still involved? There's a note with the Pew Charitable Trusts. There's still family members when I had worked there. But you know, the money had come from the family from a long time ago. There's other organizations where you still have the current donors and philanthropists as part of it like the Gates Foundation is, how's the structure of the town foundation?

Dr. Beeta Jahedi 02:04

Great question. The family is still involved. So our founders were Leonard and Claire Tao, who are pioneers in the cable industry, is how they made their wealth. And Claire unfortunately had passed away. But Leonard is almost 94. He's turning 94, a couple of weeks. And He is the chair of our board and very much involved. We talk frequently. And his daughter Emily Tao is the President and I report to her. And the two sons, Andrew and Frank are on the board. And there's a bunch of lovely grandchildren on the board as well. So yes, it's very much still a family enterprise.

Tony Kopetchny 02:41

It's wonderful. Thank you for sharing that. I really appreciate that. It's incredible for a lender to Wow. That's amazing. So first, big congratulations, since you've recently completed your dissertation. Sure, that must have felt great, I

Dr. Beeta Jahedi 02:57

can't even imagine thanks for the congrats, it feels amazing to be done.

Tony Kopetchny 03:02

It's awesome. And so just to start diving in, you know, to possibly state the obvious, we're in a major state of change as a society, which is impacting the mission driven nonprofit sector. And whether it has been acknowledged or not, in terms of how our work is organized and done, you know, the systems and the processes for how we're organized. Can it's all just up in the air and evolving. You know, people have talked, I talked to a lot of people, and I'm like, they're gonna think there's going back, there's only going forward. But I think what's scary sometimes is the pictures not painted yet, it's still somewhat of a blank slate. But your research, your dissertation was a lot on valid leadership and the mission driven sector. So I'm wondering if you could tell us, you know, about some of the findings that you had in your research and what led you to take that topic on?

Dr. Beeta Jahedi 03:50

Absolutely. I was really interested in looking at FiOS and how they learned to make strategic decisions. That was my big research question. I looked at three different areas to encompass that. So one, What activities did these CEOs partake partake in to help them make the decisions required of their role? I looked at how they learned to take these, like activities or things they do to make those decisions. So What process did they go through to learn about what steps they should take in order to make that decision? And then finally, what facilitated and impeded their decision making process? I know it's a mouthful. But all of those three sub topics help drive at that main topic, which is quite simple. As primary research findings, 100% of the participants I had and I should preface by saying I 20 participants, CEOs, foundations and other philanthropic entities participate from across the United States. It was a diverse pool of CEOs in terms of age, sex, You know, gender, identity, race, everything you can imagine, representing the CO flow I'd love to see in the future versus what the reality is. And so this is the data from those 20 qualitative interviews that I conducted. So 100% of them told me that their primary activity they engaged in while making a decision was engaging with staff and board. And this was either to actually get information or just to get buy in, maybe they had already thought of what they wanted the decision to be, but knew they needed buy in. So I thought that was really interesting that all participants that that nearly all of them 95%, that they mainly learn through informal means so engaging in one form of what's called experiential learning. So basically, it's learning through living life, either reflect on things that have happened in the past, or you're learning in the moment. And this was also interesting to me, because a lot of the fields had a lot of formal fancy degrees, JGS, and PhDs and MBAs and this is truly how they learned out with through living life and trial and error and mentors, etc. And then the third main finding was that the level of authority and accountability really helped drive at their making decisions they knew they had to, and they had the full power to do that with what they attributed to being successful in decision making and able to do it quickly, as needed. And all participants refer to interpersonal relationships, presenting an impediment, which stem from power dynamics, as you can imagine being in that role affects how you interact with others, and how, most importantly, how they interact with you.

Tony Kopetchny 06:55

Talk more about that last part, is it. So if they were working, one of the things that they want to engage staff and the board, but it's, it's there as the CEO level that then makes the relationship different with the staff member? Is that kind of where you're driving it?

Dr. Beeta Jahedi 07:12

Yes. Okay. In essence, that CEO, which is the CEO role is fearless. And that's what actually I saw on research that drove me into this topic, because I was digging, because the staff report to them, and they report to the board. So there's power dynamics from every direction. If that makes sense, sandwich.

Tony Kopetchny 07:35

In your research, I mean, so within an org, you're peerless to do the CEOs you've talked to or leaders, you know, like that? I mean, are they looking for peer cohort? That I mean, how do they? Where do they bounce ideas around? I guess, is the question.

Dr. Beeta Jahedi 07:53

It's a great question. They do seek out peers, as you can imagine, some level of decision making has to be confidential, right, whether it's HR related with one that came up a lot, or if it's some kind of strategic decision that might impact the sector and shouldn't be public knowledge. But there are some regional associations like philanthropy, New York, and Northern California grantmakers, and others that they partake in the seal groups to find some peers. I would say most of them seem to have good conversations and generally bring up information at best, but also couldn't get too deep with their peers in general, is what I learned.

Tony Kopetchny 08:38

That's interesting. So, you know, is what do you think CEOs can do to reduce the effects of power dynamics that are in play in an organization? Are they part of the problem? Is it the problem, power dynamics?

Dr. Beeta Jahedi 08:53

I thought a lot about this. In some ways, the hierarchy and an organization creates that power dynamics. So by default, being in the CEO role creates, creates that dynamic. But I do think that CEOs can do things to mitigate some of those dynamics internally, at least, they're at the top of the organization, they set the tone. And they could, they could encourage people speaking out on unpopular ideas, or seemingly unpopular ones, and maybe discouraging people who are holding back and not having as much praise and reward for those people. So I think there are some small cultural items that they could work on to create more of an open environment and some of them are I have to say, some of the people I spoke with are added working hard. Some of them remove themselves from the room for some decision making with staff and then get because they don't want to impact the dynamic and are aware they do so. There's all kinds of interesting models at play. It's definitely a challenging place to be in though.

Tony Kopetchny 09:58

I'm curious if we With your research and all the thinking you've been doing on this for a few years now and your experience in the sector, going through the transformation we're in and from my work, and what we do here applies to a lot of times it's how are we engaging audiences publicly or technology? And it is starting to turn into for large organizations? How do we engage staff? You know, there's a lot of worry about staff turnover, but in a learning organization, you need feedback mechanisms. And, you know, you talked about some of the CEOs trying to create more of an open culture dynamic. Where have you seen any place where people can put feedback, whether it's anonymous or not, and it's actually responded to and

maybe even starts to turn into a knowledge management source, but a way that I can at least if I have something I want to say, I've summarized, no, I can go to put it. Have you seen any of that, and the organizations that you've been looking at?

D Dr. Beeta Jahedi 10:56

See, the most recent thing that I came across during these interviews was they have anonymous surveys around COVID, and staff. So staff have a lot more power since the pandemic started, because of the great resume with nation. And just them being happy is very important than being healthy is very important to the organization. So the dynamics shifted a little bit and the anonymous surveys the leader can to really take to heart whatever information comes up from those but I would say it's not like in a forum that someone could just at will give anonymous feedback at any given time, it has to be solicited, with those people I spoke with.

Tony Kopetchny 11:39

Do you think an open forum would be useful? Or is it too open ended to be of a utility in the moment?

D Dr. Beeta Jahedi 11:50

think it'd be extremely useful. I believe in learning organizations and all those processes, the reality is you have to be prepared as a leader to respond to that feedback, right? And be willing to make changes. So I'm not sure how, quote unquote, disruptive that might be for some of the leaders. And maybe that's why it doesn't exist in our field that much, as far as I know. But I'm sure other industries do utilize some kind of, you know, feedback. And a lot of startups I know, adapt rapidly. staff meetings, I would say some leaders would say are the way that they get feedback. But of course, it's not anonymous, like you just mentioned. So it could be a little filtered, but with the right culture, perhaps you do get some good information and adapt from there.

Tony Kopetchny 12:43

Hey, you're giving me a lot to think about this gets back to that power dynamic. You know, if you're going to, gosh, if you got to set the course, you know, you can take feedback in which probably can't act on all of it. And then but you want to encourage people to do it. So you don't want them to think that it wasn't heard. So how do you you know, not a balancing there? These are great questions. Yeah. Probably part of the large evolution we're all going through. So what you know, we talked a little bit and you What led you to the research topic. But I guess what I'm really curious about too. Are there any surprises along your journey? As you're doing the research, you're like? Well, you can see that one coming.

D Dr. Beeta Jahedi 13:25

What led me to this topic was I again, this idea of peerless Neff is being unique to the CEO role,

because even board members have other board members, staff have other staff, at some level, even if their role is more senior about that was really fascinating. And also just hearing along the years of my career, just some people in positions of power, whether CEO or otherwise, would say no one said that to me before if I made a comment to them about some topic we're conversing about. And I just thought that was really interesting. That would keep coming up. I'm fairly diplomatic, but direct and like to be treat everyone the same? I guess it's my life philosophy doesn't matter who you are, I want to have the same type of conversation with you, which is probably what has brought me to those situations. So that has always been in the back of my mind. Like, why is it that some of these people and they desperately want that honest feedback, that candid feedback, right, it's very welcomed, even if it's a little different than what they thought. So that's what led me there. And there were a lot of great surprises along the way, I would say, one of the big ones was I'm more of a doer for my network. I'm a connector but I like to do that for others mostly don't ask for much. But here I had to ask my network to help me connect with some fantastic CEOs across the country from medium to large sized foundations and I want them to be diverse. So I asked a couple folks and I recruited my participants pretty quickly, like within I don't know a week or two and no one said no One person had to say no because of scheduling conflicts. And that's someone I know pretty well. But everyone else, including strangers were so gracious and excited and warm, and we're happy to give up an hour of their busy schedules during peak Delta crises and COVID. And Nether pleasant surprise was how candid the participants were, I really felt like we had some heart to hearts. And there was trust there, even with people who did not know me personally before meeting me for the interview. Perhaps it was because I activated those networks. Perhaps it's because I was in the field, I'm not quite sure why. But I expected a little bit more performative as if someone was on a stage speaking versus sitting in an office with the door close and just sharing. That was really, really lovely. And also, they were fully anonymous in my study that might have helped as well.

Tony Kopetchny 15:54

Are you conducting the interviews in person or over? In person? Isn't 3d live with the person or through zoom or teams or?

Dr. Beeta Jahedi 16:08

I wish it was in 3d. No, it was it was through zoom, which, of course, presents some challenges, but also gets rid of some biases, right? When you walk into an office, how people greet you, and the general sense of the office might make some assumptions for the researcher to start leaning into and direct the conversation to actually zoom in an equal playing field in many ways.

Tony Kopetchny 16:33

She's so as part of it, too, is it is interesting that they were so open and candid throughout the interview, did you give a preview back of your research ahead of time or like a debrief to the folks that you interviewed.

Dr. Beeta Jahedi 16:47

So I offered to share the transcript with them to make sure they were okay with everything they want, I think emitted no one wanted to see it. They were all happy. They trusted me. They said just do a good transcription, use whatever you'd like. Some parts, they would say this is off the record. And I would make sure that was removed from the transcript. And I would never, of course, use that information. So I guess Yeah, I guess people were pretty open to what would come out of this. And I did share the final dissertation with them all, at the end of the process, and a lot of them wrote me very thoughtful feedback over the coming weeks.

Tony Kopetchny 17:27

That's wonderful. Yeah, I often find, you know, some of the research we do within with our group to maybe it goes back to what you said about being peerless. I mean, there probably is some feeling of, oh, well, I, if I participate in this, I'm going to get a little back to and I could see what my peers were talking about. So that's, yeah, that's really exciting. So I let's see. So how can leadership adapt while maintaining? You know, we there's a lot of transfer. Like I keep saying there's transformation. There's moment, there's the work you've talked about? There's the ideas you've got going forward, you know, even talked about that feedback mechanism there just a couple of minutes ago, but how do you change operations while still operating in your day to day model, I think is a challenge. I see time and time again, just in the conversations I'm having, right? It's Oh, yeah, good. I need to do this. But I can't stop what I'm doing today to get to the next level. So you know, what advice would you have for sort of managing the iterative progress the expectations, you know, that blend that you sell to for CEOs at the you know, they've got to talk to staff, they've got stakeholders, they got board members, how do you keep everybody involved, and then get home at the end of the day, maybe and be able to have dinner in peace once in a while, instead of working 24 hours a day to make all the changes?

Dr. Beeta Jahedi 18:50

Why a big question. So one interesting thing that revealed itself when I did my set, I guess my analysis of the data gathered was that there were two main categories that reveal themselves to me, action oriented CEOs and reflective Theo's is what I named them, the action oriented CEOs were all about moving on to the next step, getting feedback to improve the process, because they want to move on to the next thing, really excited about taking action, literally. Less interestingly, less comfortable with firings and those big decisions, like Oh, I knew I should have hired that person for two years and took me a long time to make that happen. So that was interesting. Versus the reflective CEOs were a bit more iterative, reflective, very inclusive and decision making trying to get all those voices at the table. Was it enough voices, you know, how do I improve this just constantly ruminating and oftentimes they would set time limits on okay, I can dwell on this for three hours or three minutes or three days or three months. Just to control their own process, because at the end of the day, all these CEOs have to make decisions in a timely manner in order to fulfill their roles and responsibilities. So I think those two and funnily enough, I don't believe in two groups binaries, but this is what emerged, I could not figure out a hybrid or a third group, I'm sure they're out there, I might need a bigger pool for that. I think I would say that these two groups probably would be handling that differently, right. They're kind of opposite in many ways, and have different challenges, different things that are easier for them. And one common thing I saw across the board was everyone was

dealing with the Delta variance search, when I was interviewing them, it was July through September 2021. offices, were still postponing their reopening. And the CEOs were all quite exhausted, and really just tired of making plans and then going falling through and having to lead without knowing what's happening was really, really stressful. And a lot of them frame this as they were more command and control as how they framed it. So I guess even these reflective Theo's were not able to do that that was not what was required of them at that moment. They had to just make quicker decisions and not include as many voices they had to just as an executive decision they have to take in information. I thought that was really, really interesting as well, because the situation put everyone in the same pool. Does that kind of get at what you're asking?

Tony Kopetchny 21:37

I'm curious to just make me think, you know, decision fatigue, and this is a person's job is to just make constant decisions. And then you're, and then you're doing it in a stressful model with Coronavirus was really hard. I mean, you're winging it almost right. Because you really don't know what's gonna happen tomorrow when variants come in. But your whole team's depending on you. I mean, what did any of the interviews and your research event? Did anyone talked about the fatigue they were feeling just from the burden and load of constant decision making?

Dr. Beeta Jahedi 22:10

Absolutely, absolutely. They did talk about it. And we're, yeah, we're rescheduling a couple people rescheduled to me because of some emergency, it's related to that. And a lot of folks I talked to said this morning, I just made a new decision for the office plan to XYZ reopen hybrid optional, whatever the situation was. And those change I found out later, because I do talk to peers in the field, of course, so they had to adapt some more. But it was a lot of high stakes for them, they wanted their staff to be safe, they want their operations to do as best they can. Some boards want the staff to be in person, that's more of a culture, though for culture. And some are more flexible, right. And there were one or two CEOs that were sitting in their office, it's when I interviewed with them. And they were just there, like the office is optional. I'm the only one here but I'm excited to be here.

Tony Kopetchny 23:10

Just for my own thinking, too, because you touched on it there just a little bit. I talked a lot about it, but the future work for the groups that really wanted their organizations in person. Did they talk about the why they felt that was more important than testing into the remote work environment? Or through opposition? Could any of that ever come up?

Dr. Beeta Jahedi 23:35

I would say maybe not head on, but maybe a little bit around that topic. It seems to be partially, again, culture, the board, it might come from the top talk though, the person they report to, it also seems to be a little bit of like, wanting to be able to see that people are

working and be able to have a little bit more control in the situation. Right. And of course, they all know that productivity is through the roof working remotely. I think everyone acknowledges that research and evidence. But at the same time, I think there is a some people just less comfortable with that idea. And some roles really require in person right, some roles had to go in for the whole pandemic, they had to cut checks or whatever the you know, role was IT operations, right? They have to deal with electricity issues, flooding, all the COVID protocol with some other staff have to be there physically. And there are so many benefits to human interaction. So I think they lean into that. But at the same time, the world is changing a lot. And it's important to keep up.

Tony Kopetchny 24:43

Yeah. So we've talked about because COVID still here, unfortunately and come through the pandemic, maybe you know, that we talked about that as an adaptability the CEOs were talking about but I'm curious to just some of the responses to some of the largest civil rights movements we've had in the United States over the last year and a half things that keep occurring, have they, any of the CEOs that they talk about what they're doing differently within their organizations based off of what's happening out there in the world in the social sphere?

Dr. Beeta Jahedi 25:18

That's a great question. So this was a topic, I didn't bring up COVID, or the largest civil rights movement, as you phrased it, the horrible killings of ahmaud, arbery, breonna, Taylor, George Floyd, and then we had the horrible Asian American tax in Atlanta and 2021. But they brought it up, yes, they some of them are using more equity centered frameworks, kind of tossing out how they did everything and tearing it apart and restructuring in order to be hopefully last structurally racist and more inclusive, more community led, some were grappling and other ways, dealing with their own race and the field. And what all of that meant philanthropies very white dominated, of course, and having a diverse group of CEOs I spoke with was really eye opening, because I got a lot of different perspectives. And some of those were around race. And then I would say a couple folks also attributed especially bipoc, folks, their experiences growing up as making them stronger and better leader because they had experienced some not so great things, and in justices, but that made them more aware and better able to better serve people like themselves in their community, literally, in their own words, they said, and that was really powerful.

Tony Kopetchny 26:43

Did any of them as they were discussing that talk about how they were sharing the adaptations are changes with their staff? That did not come up? No? Okay. Well, so I have another question too. But I'm gonna switch a little bit from leaders to boards, or nonprofit boards, they do seem to come in all shapes and sizes, whether how actively they are involved, what kind of influence they have in decision making. I'm curious, what are your thoughts on how a leader can best position themselves to manage the organizational strategy and operations while balancing the demands from their boards.

Dr. Beeta Jahedi 27:28

In some ways, managing and working with a board is a full time job in itself. CEOs have a lot to do that does not relate to their boards, in terms of leadership, as we know, their internal operations, external engagements, networking, all these amazing speaking engagements they have to do, et cetera. But the board is really critical to your point. And building that trust with the board is so important. And that came across through most of my interviews. Some Theo's already had the truck in a relationship with a board or had some kind of connection with them. Some were brand new and hired as a first ever X type of person, you know, in terms of demographic, and there was a whole new way of working together, and they had to build that trust and brought it up repeatedly. I would also say one thing that I was not thinking about, but what came up frequently was importance of the relationship with the board chair, it really can be a partner for a CEO, as close as you can get to appear, even though they're your boss, if you have an excellent relationship with the board chair, it seems like that was something that the CEOs leaned on heavily testing ground before going to the full board. And no judgement space, like you're not going to take this literally. But can we talk through something that's affecting the organization and know that I'm just talking through situation, I'm not making a decision or judgment, that kind of relationship was transformative for both leader. So that was really, really fascinating for me to learn about.

Tony Kopetchny 29:07

And thinking about that with the chair of the board to the CEO. You I don't know the rules of this. I mean, I've worked in organizations where the board would rotate every so many years. So the board chair would change. I don't know if there's boards that doesn't happen in but it seems like if you're going to build a relationship to a board chair, it might be better if they're longer term or tenured in their position have any thoughts on that like how often boards transition or the chair transitions.

Dr. Beeta Jahedi 29:43

So best practice is definitely to have rotating board term and rotating positions for chairs, etc. And if you're electing a chair from the board internally then the CEO should have some what a relationship with them, right. So that could be so still pretty good. And I should have kind of a say not decide on who it is have a say and who they think might be a good fit. In philanthropy, however, just like let's talk about the top foundation, it's a family run board. It's an order, like there's no term, there can't be the family needs to be engaged. So that brings in other challenges. And they find other ways to bring in community voices and other perspective, which is great. But in some ways, it's also limiting, we have to get really creative. And our foundations, I would say, probably choose not to have as many changes to their board for whatever reason, they like to perhaps for that building that rapport with the chair and the leadership is what is expected. Philanthropy is not the most cutting edge dynamic field. Unfortunately, it's a little slow. And it's evolution. It's, you know, a very important institution for hundreds of years ago, but it definitely is not like the tech sector, let's just say and I think even parts of the nonprofit sector are much more dynamic and nimble. And I think that's reflected through that. I would say also that do you think it'd be nice to have more diverse boards boards are the least diverse part of an organization oftentimes, and sometimes you can't, again, like if you have a family run board, it is what it is you have to get creative, other ways to include voices and maybe have participatory grantmaking models such and such on new ideas and try

them out. But in some cases, you can bring on new board members that are different. And some research by dig into showed that there is a preference from boards to higher Theo's that think, like them and reflect them. And when there is not, it's not a good working board CEO relationship. I didn't dig into this specifically for my topic, they did come across it and a couple themes that mentioned past jobs that were not good. It was exactly that that was not a great situation for them that they resigned, or the board and them did not congeal. They weren't currently in those positions that they had previously been.

Tony Kopetchny 32:15

That's fascinating. I feel like in my head, it's gonna sound silly. I have like this chicken and egg thing in my head, like, does the CEO represent the York first and then you figure the dynamic with the board? Or is the board the organization first, that then sets the tone through the CEO? Does that make sense at all? When I'm thinking?

D Dr. Beeta Jahedi 32:39

Yes. And I have no idea, Tony, it is a chicken and an egg. I have no idea. I don't know if anyone does. And if they do, do they really?

Tony Kopetchny 32:50

Gosh. I mean, yeah, I was like, how much of that is possibly personality driven than two? I guess? Who's got the bigger personality? Maybe? My I don't. That's interesting. Never really thought of it that way before. But that that dynamic dynamism? Sorry, trying to drink some more coffee get my pronunciations better. I do have another question too, when we run into, I just love to get some of your feedback on it. But we run into it a lot. And it's I see it mostly in medium sized to large size, nonprofit organizations. And it's a pool or push and it goes back and forth between federated models where the program work being done. Not only is doing the program work out there in the world, but then sets up certain operations with inside of a to whether that's communications or its own fundraising, Viet to see them set up their own HR. But you know, many operation units within it and versus a centralized sort of operational center of excellence that then serves to all the programs equally. It feels like it's just always going back and forth every so often. And I don't know, I'm not trying to prescribe one or the other as the right fit. I think it's probably based in each organization's needs. But I just wonder what you've seen out there between those two types of models. And you got any thoughts on it?

D Dr. Beeta Jahedi 34:19

Yeah, I think both are really important. I come across both frequently through work and the decentralized models, in my opinion, are excellent for especially larger organizations that are widely thread, whether nationally or internationally, you can have more of a custom structure with a federated model local board, or advisory committee may be the culture can be customized to match the culture of that region and its needs. We can't expect one shop to best fit with the entire world mode of being right. So that's kind of more powerful in those cases and On centralized models are great because you can really have that organizational culture that's

cohesive and a deeply ingrained philosophy that's ingrained with all the staff in the same way. And all the work you do and can really be a excited and energized enterprise. That's one unit and have some identity. And that's great for a lot of midsize organizations that what you just mentioned the lies and my responses. Well, is there's a trade off for each and I don't think it's yes, this is better, without better and I think both can be good. And with the right strategic analysis, if organizations are willing to do that inner work, and depending on probably where they are in the lifecycle of their organization, are they a startup nonprofit? Are they a well established 150 year old Foundation, right? Like there's so many different models out there? What may be best for them, and their mission could change over time. So just taking stock and being open. That type of change. I've only seen it happen once or twice between moving between models, and it's extremely difficult. So, of course, I think that's probably why we don't see it more often. It's just a major infrastructure change. And you have to be 100%. Sure, because it's such an undertaking.

Tony Kopetchny   36:20
Yes, it's huge infrastructure change,

Dr. Beeta Jahedi   36:23
what are you seeing, I'd love to hear what you're saying around that.

Tony Kopetchny   36:27
I will first I really love what you're talking about on the federated side for the large geographically dispersed organization and being able to operate locally, you know, with some center core, maybe that takes care of the legal logistics, or the HR sort of helps keep a brand architecture across all of it. That makes tons of sense to me, I think we're I've seen it as you were talking or starting to codify my head to just coming back. And especially since you're at a foundation, I'm curious for your thoughts. But there's this, you know, when I was in house that a lot on profits was like 10% can only go to overhead or there was some number that I asked about a one year and I said number come from, like, you know, we all just kind of made it up. So we stick by it. But there's it was 10, or 20%. And you shouldn't have any more than that ever going to operations. So I found organizations pushing a federated model, not in the way you're talking about it, which sounds incredibly effective, it was more like I have to do this because the money should stay over there. And I don't want it to look like the money's not going to program work. So I'll now bury operations in the program directly, instead of what a lot of groups refer to as a tax back to the senator trying to keep that operational line lower. That's, that's what I've seen as like the anxiety around it from a centralized place, I find a lot of pain points and conversations I have when it comes to, oh, well, if you're the central brand, or marketing or fundraising team, you're like the brand police don't let the program say this or that night. I don't think that's right. You know, if you're working on a program, you're going to have to your point, if it's a program or if you're your international and you're in different countries, that colloquialism or the way you need to speak locally, or whether it's about specifics of a program or the specifics of the geography you're in, that makes a ton of sense to

me. I just, yeah. And then smaller, maybe in the smaller medium size, I feel like it's always been, it's been less about the tactical effectiveness and more about the financial number maneuvering, if that makes sense. Talking.

D Dr. Beeta Jahedi 38:35

That's really interesting. When I was working in California, there was a project I was assigned to called the real cost project, they might have to change it to call it the called the true cost project. It's either flipped either way, I'm not sure exactly what they ended up with, but basically is about exactly this, this arbitrary number for overhead. That is sometimes people move the numbers around to make it work, etc. and funders have an adverse reaction to seeing 15% or whatever the actual cost is. But when we buy a Starbucks cup of coffee, we don't say how much did these ingredients cost? And how much is going towards your electricity and wrench like, that makes no sense. So why don't we do this in the nonprofit sector? And that's what the whole project was about really important topic. And I think that unfortunately, makes sense that the federated models are used in that way. Sometimes I have not seen it firsthand deeply in that way. But that makes sense that it's it's definitely tough out there. And I hope that more founders are more open to funding those full budgets, whatever they are because nonprofits need to thrive by being subsidized for the work they do and always they can't take it out of what budget out of reserve to have your executive director LEED and to have good technology. When I was at philanthropy, New York, I helped plan programs and events. And we had one on this topic. And I remember a very prestigious, large national United States, nonprofit leader who was retired, came to speak and full, very beloved very well. It's like thought of etc. and fully admitted, I kept our overhead low, because that's what was desirable. But let me tell you, we could have benefited from some tech upgrades, we could have benefited, we could have done so much better work, if I didn't have to do that. And I know we did great work. And I totally see that but, and I thought that was so powerful. I must have been 24. At the time, I was pretty early in my career when I heard that it was so powerful for me to hear that because I thought, Wow, such a shame, because we all care so much. And we want the same thing. But why does this arbitrary number seem really unappealing sometime? And maybe there just needs to be more contacts? I don't know what the answer is to making it more broadly acceptable to have a higher level of overhead on a budget.

Tony Kopetchny 41:08

Yeah, whenever you were just framing, like, change the word overhead. And let's start calling it investment. Like how do we reinvest into the organizations as a whole to make them operate better? To the tech point, we run into that a lot? You know, a lot of work we're doing now is technology roadmap and planning? Like how do you a get the people on board? But like, what does it look like? Because it's never going to happen in like six months, this? This is like, you know, we right through your roadmaps because it takes time to select technology, implement technology, change people to train people to get the change management aspects, right. And you need to, it's like, we got to start weaving the understanding that there's ongoing costs, is this not a one time Oh, you got a laptop, everything works. Now, these constant evolutions, especially since everything's really gone digital, and what does that really mean and digital transformation? But yeah, I don't know, maybe, if we reframe it as an organizational investment, instead of overhead, but like, I always thought about too, in terms of

communications teams, it's like, great, you did a bunch of work. But if no one hears about it, what's the point? So why is outreach to an overhead aspect to what you're doing? It should be integral, I think, to getting it out there and getting more people involved in your mission. But

Dr. Beeta Jahedi 42:28

not currently. And one thing that, yeah, we did this survey during the pandemic a couple times about, like, how prepared were you? How are you functioning to our grantees at the top Foundation, and I can't get into details of a survey. But it was just surprising that a lot of people it was technological, lack of investment and lack of funds to invest in that we're holding them back in the transition, they couldn't operate. And the reason we have at the top foundation operator wealth, our board and leadership decided to invest. And that's all happening, great laptops that plug into monitors, and we were actually very well prepared for the pandemic. I think they implemented this new technology. Within six months before the pandemic started, it was actually lucky that we happened to be set up for it, but I really had a lot of compassion for and we definitely did help out wherever we could. And I know some funders bought zoo licenses for all their grantees, like professional licenses and did nice things like that. That just helped out because I think it was a universal issue for a lot of organizations. Yeah, I

Tony Kopetchny 43:33

thought it was GOOD. Through the pandemic, to the end, there's, you know, attention from MacKenzie Scott, I think Melinda French kids, she's looking at doing it now too, or it's, here's the money, like, you're going to use it as you need to use it. I'm not allocating X percent to this and X percent to that, and I've seen recently the Ford Foundation is doing it tickets, three year operational focus grant, to help with operations in organizations, not just the program side. So maybe there's a shift coming. But yeah, even just digital asset management, like it's the most not cool, fun tech, but it is so important. And you just think about when the pandemic hit, and everybody had to, you know, couldn't go to the office, you had to be home and you already didn't know what was going on in your own life. And then there's people I'm talking to, and they're like, oh, shit, we literally only had a printout of this document. So somebody has to go find it on somebody's desk, and then they've got to scan it and then figure out how to get it in and I was like, wow, that's Yeah. In red, red that level. So, you know, I did more investment, I think and these technical tools, which I have a long term benefit, it's not like it's once you start doing that, and data starts getting organized and the processes there and your teams know how to use it like this stuff, just build cumulatively, you don't go backwards from it and it's not exponential increase in costs. Eventually, your costs will come down and they'll be in line. It's at startup cost, and unfortunately everyone's going to be on is the expensive part if you have to acquire the new piece of technology in the training? Yeah, I don't know, maybe I'm going off on a tangent. Sorry.

Dr. Beeta Jahedi 45:12

No, it's really interesting. And I think these new trends in philanthropy are sometimes set by these leaders like Kenzie Scott and Melinda French gates. unrestricted funding is so important. I love how they approached their funding in that way. And publishing lists, I think, is great if they don't have to write because you might be an LLC, overseeing all kinds of new philanthropy. And

philanthropy to me, means love of mankind, right? So it's about giving, that's what it is, it doesn't need to look like a specific thing. In my opinion, there's a lot of ways of being philanthropic, it could be helping out your neighbors and an informant, you can have a giving circle, I think those are so powerful, right? Those are informal, giving, they don't get tax benefits, but you might just invest a certain amount of money within a friend group and then help your kid you know, go to college or whatever it is that you do. I was really interested in studying those for a while because they're just so powerful to me as a model. But I agree, there's like a lot of ways of doing it. Unrestricted support is definitely very liberating for organizations, when when people are able to do that for them.

Tony Kopetchny 46:25

It's their reason, and you're because I am honestly not that familiar. Like, is there a fear from a donor that if they gave unrestricted funding you would, something bad would happen? sort of thing.

D Dr. Beeta Jahedi 46:39

Fortunately, I don't really know firsthand, I've only worked for funders that do give unrestricted grants and try to get as much as they can and love multi year support. So fortunately, firsthand, not what I do gather from reading and talking to people is that there's some stories out there of nonprofit mismanaging their funds and right, like no names of organizations, etc. But there'll be some big stories and that kind of scared off some people they think, oh my god, I thought like half nonprofits are like this, like corrupt and there's no, right there's no then this is less the professional funders more or the personal private funders, in terms of like people giving their own money. But it's a little surprising how that perception can build out. inaccurately, right, most nonprofits are working their butts off to do a great job and are very thoughtful about how they spend their money, like 99% of them probably in my guess.

Tony Kopetchny 47:43

Yeah, I 99% of your IRAs are 99%. Right. Yeah. It's thoughtful, thoughtful, and I'd almost say scared sometimes about spending their money. Like there's Yes, yes. I've been in those conversations, or it's, they know they need to do something. It is expensive. They're really uncomfortable putting the money. Yep.

D Dr. Beeta Jahedi 48:04

What one of my favorite blogs is blue lives, nonprofit AF blog, to be called nonprofit with balls. And Vu has a lot of great posts. And I remember one of them was about a, like buying a chair and like what chair so comfortable. But can we get the nice chair and just like the grappling of a not normal nonprofit with something as simple as buying comfortable furniture, right, like, and philanthropy doesn't have to think about that as much. And the people they give money to do sometimes. And that's the truth of it. Right?

Tony Kopetchny 48:43

Really is. Yeah. And to circle back. I mean, and all that feels like to your point back to the peerless CEOs trying to balance the board demand, what the grant asks and what the staff wants or needs in a moment. And yeah, that sounds anxiety producing to me. Glad you found some folks that maybe put some good ideas out there for it. But that sounds like a lot for folks to weigh in on. But thank you today for your time. This has been amazing and wonderful. And I've had a lot of fun in this conversation. And I'm wondering, just before I get to my final question. Do you have any other thoughts you wanted to leave to the audience or some parting wisdom for folks listening?

Dr. Beeta Jahedi 49:28

covered all the main points, just, I guess, being open minded about things in general is great as we talk about unrestricted funding organizational structure. And just the challenge of leader affairs, in general is my biggest takeaway from my dissertation. It's not an easy situation to be in, in some ways, it's impossible to get that authentic dialogue going in a very deep way.

Tony Kopetchny 49:57

Thank you. Yeah, that is great. Yeah, to open mindedness of the the moment of transition are all in just grace and patience and being willing to push forward through it. But thank you so much. So the last question I have Sainte Marie asked of all of our guests and for anyone who has been listening you should know that we've started Spotify channel that you can grab all of the wonderful tunes that our guests have talked to us about on the show and today betta I would like to ask what is your go to song when you need a boost? And why?

Dr. Beeta Jahedi 50:33

I have to admit, a Mariah Carey classic always does the trick for me. And since you want a specific font, I'll just pick fantasy. I could pick a million though. And I guess I listen to a lot more I have growing up so it makes me feel uplifted. It's nostalgic. For me. There's familiarity. And also, I don't know what gave me this impression Exactly. But as I knew her as an artist, as a child, I definitely thought of her as someone who went through a lot in her life and still was this great artist and presenting her thoughts so beautifully and her talent sharing that with the world. So I found that inspiration when I was younger, and it still makes me feel good to listen to classic.

Tony Kopetchny 51:11

Wonderful, thank you. We're gonna be very excited. Yeah, I'm Mariah Carey, so on to our Spotify playlist, which everyone can access and have fun with now and again, beta, thank you so much for your time today. Really appreciate it had a lot of fun, and I am looking forward to maybe possibly meeting you in 3d. And in the coming weeks up in New York. That'd be wonderful.

D Dr. Beeta Jahedi 51:34

Thank you so much for having me, Tony. This was fantastic love talking and nerding out about all of these things. And it's been great fun for me too. And yes, hope to see you in 3d. In the coming weeks. That'd be awesome.

Tony Kopetchny 51:47

Wonderful. Thank you and goodbye.

I Intro 51:53

Thank you for listening. Join us again for more engaging ideas with your host Parsons TKO CEO Tony Kopetchny. If you enjoyed this episode, please leave us a comment and share with your friends. Send us your feedback at create change at Parsons tko.com.