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Strategizing for Social Good: How Consulting Shapes the Nonprofit Sector

Reisman, Leah Margareta Gazzo

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STRATEGIZING FOR SOCIAL GOOD:

HOW CONSULTING SHAPES THE NONPROFIT SECTOR

Leah Margareta Gazzo Reisman

A DISSERTATION

PRESENTED TO THE FACULTY

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Abstract

The use of consultants is widespread in the nonprofit sector. In institutional sociology, consultants are considered agents of institutional diffusion and normative isomorphism--carriers of management ideas and fads into new settings and drivers of inter-organizational homogeneity (DiMaggio and Powell 1983; Sahlin-Andersson and Engwall 2002). Correspondingly, in the nonprofit sector consultants are thought to contribute to rationalization (Hwang and Powell 2009) and the growing similarity of organizations across sectors (Meyer and Bromley 2013).

Drawing on ethnographic fieldwork in three consulting firms and 180 interviews with consultants, clients, and funders, I paint a more complex picture of consultants' role in nonprofit rationalization and the spread of practices. Rather than driving homogeneity across nonprofits, consultants to nonprofits produced variation in the organizational structures and management strategies they recommended to clients, reproducing the heterogeneity of the contemporary nonprofit sector. As professionals with nonprofit backgrounds working in for-profit firms, via their practices consultants strove to enact genuinely supportive relationships with their nonprofit clients. They concurrently mirrored nonprofit practices in their own firms, at times undermining firms' bottom lines.

By analyzing how consultants conducted research about their nonprofit clients, facilitated meetings about findings and options, and managed their own businesses, I show that while consultants pushed nonprofits to be focused and intentional about linking activities and desired outcomes, these general recommendations did not contribute to inter-organizational homogeneity. Consultants customized standard frameworks and blended consultant-generated data with clients' perceptions, introducing variation into the management strategies consultants

recommended. Consultants also defined unique peer groups for each client, guiding clients to distinct options depending on their particular peers. Simultaneously, while consultants produced variation in nonprofit practice, the hierarchical structure of the consulting field led consultants to reproduce broader inter-organizational hierarchies within which consultants' work was situated.

These findings suggest that rationalization in the nonprofit sector is more heterogeneous than existing accounts suggest, helping explain scholars' observations that despite widespread rationalization, the nonprofit sector remains decentralized and varied (Bromley, Hwang and Powell 2012). More broadly, the case of consultants to nonprofits provides new insight into consultants' role in institutional diffusion, helping explain why complete and rapid diffusion only rarely occurs.

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In my time at Princeton, I was fortunate to have been advised by a truly unparalleled committee of scholars. By exposing me to Science and Technology Studies, Janet Vertesi grounded many of my sociological curiosities in a language and methodology, and provided a lens using which I will continue to view the world. As a friend, mentor, and advisor, she helped me feel at home at Princeton, and inspired my journey in organizational ethnography. Viviana Zelizer provided me with a framework by which to take action on my perennial interest in money and its place in the nonprofit sector. Viviana also reminded me frequently, and especially when things were difficult, that we are all people first--her kindness, understanding, and the care with

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It is no mistake that this dissertation hews closely to the theoretical and substantive perspectives on which these scholars built their careers--I am endlessly grateful for their guidance. I am also grateful to many other Princeton faculty--Patricia Fernandez-Kelly taught me about courage and candor, and Mitch Duneier helped me hone my craft as an ethnographer, opened doors to my work in the arts, and welcomed me as a student and as a colleague. I am also grateful to Adam Goldstein, Maggie Frye, Dalton Conley, Alejandro Portes, Miguel Centeno, and many others, including Woody Powell at Stanford and Emily Barman at Boston University.

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Chapter 1
Introduction

On an average Wednesday afternoon Ines, Sara and I gathered in InsightSolutions'[1] large conference room for a meeting of a client's strategic planning advisory committee. The client, a museum, was interested in expanding its science education program, which focused on teenage girls. The conference room had a large central table and flat-screen TV on the wall. A middle-of-the-line Polycom conferencing system occupied the center of the table; thin walls contained some sound, but not all of it. We took up places on one side of the table and the committee members trickled in, a few more joining by phone. Once a critical mass of participants arrived, Ines kicked off the meeting, introducing its purpose--to review a set of criteria that the committee would use to evaluate options for program expansion, then discuss several options for this expansion.

Ines read the criteria from a document that had been circulated to the group in advance, looking for feedback. People immediately lost focus, raising new questions. After a few minutes, Ines interjected. "These are great questions." She suggested integrating them into the criteria and goals of the project. Reacting to a criterion stipulating that the expanded program must focus on science, Mary, the museum leader in charge of the project, suggested that an expanded program need not necessarily focus on science, and complained that InsightSolutions' approach to planning was too linear. Discussion ensued, with other committee members challenging Mary's dismissal of science. Eventually, Ines interjected--she had been sitting very straight, lips pursed. "It would be a much steeper hill to climb to [separate] the model from science—it's a harder

[1] This is a pseudonym, as are all other names of firms, consultants, client nonprofits, and client representatives included in this dissertation. To protect respondents' identities, at times I also made minor changes to quotes or respondents' identifying characteristics.

sell." She gave the example of another client, a sports-based youth development program, and its expansion effort. In both cases, she explained, the organization had to identify its unique focus.

We moved on to discuss expansion options. Ines read through Option 1, to expand via a local university partner, and discussion ensued about each option in turn. After ample conversation, Ines jumped in. "We are hearing that we want to reach more students and also advance the museum." Mary responded affirmatively. After more discussion, Ines wrapped up. "We have gone through all the options. Are there any that are off the table completely, any we should explore more? […] It sounds like the group is gravitating toward Option 2." After a little more discussion, she closed the meeting. "This has been abundantly helpful to us in clarifying and fleshing out primarily Option 2 [as the focus of your plan]. It also made it clear that we need an overarching vision statement about what we are driving toward--we will put that together." The meeting ended, and the committee members trickled out.

Once everyone was gone, Ines, Sara and I gathered again in the conference room. Sara sighed. "The meeting really has us weighing all the options, but it should only be one of them." She said she was torn between wanting to do good by her client, and …. "we really need to talk to someone higher up." Ines agreed emphatically, suggesting we talk to a funder on the committee and "say we want to talk to the director of the museum." She continued, suggesting we talk to funders before "fleshing out" the options. "Mary thinks we will develop all of the options, and we will need that ammo--[…we can] say we think you should focus on Options 2 and 4 because funder input is this. We also have reservations about moving to a full-bore business plan without talking to your new director." Ines and Sara talked exasperatedly about how they did not understand why the clients were indecisive about the program's future direction. After more discussion, we wrapped up our debrief. Heading back to our respective

desks, Sara confided that she thought that "nothing will happen [without better client leadership]." She told me she perceived a moral issue regarding clients who spent thousands of dollars on InsightSolutions without an implementation plan.

Argument Overview

The use of consulting firms like InsightSolutions is widespread in the nonprofit sector. In the context of a dramatic global expansion of management consulting, a market valued in 2017 at more than $250 billion, a 2015 Foundation Center study found that one-third of surveyed foundations had used consultants in the prior two years (McGill et al.). Operating as a mix of for-profit firms, nonprofit organizations, and in-between forms, consultants have diverse training and backgrounds. At all levels in the nonprofit sector--from grassroots organizations to multinational NGOs and major foundations--consultants tailor, translate, and assess ideas about and strategies for nonprofit practice via services like strategic and business planning.

In the foregoing vignette, the InsightSolutions team elicited and massaged client representatives' discussion and opinions, moving back and forth between integrating client ideas into consultant-produced criteria and options, and customizing these elements to accommodate client preferences. Concurrently, Ines and Sara pushed the client to focus her work and identify the museum's unique value proposition. They placed the museum in comparison to a distinct InsightSolutions client, a sports-focused youth development nonprofit, suggesting that the two organizations shared a similar challenge. They discussed the importance of decisive leaders, and displayed a penchant for leveraging executive and funder opinions to shape client options. They also voiced commitments to "doing good by their clients" and moral concerns about unprepared clients wasting money on consulting.

As this vignette illuminates, at the border between the for- and nonprofit sectors, consultants adjudicate the interests of many parties--government, philanthropy, nonprofits, and themselves--to produce assessments of the problems facing nonprofit organizations and the optimal solutions to resolve them. As they do so, consultants translate abstract ideas and assumptions into everyday practice (Krause 2014), infuse them with their own and their clients' assumptions, perspectives, and concerns, and then translate this work *back* into statements about how nonprofits *should* function.

In this context, previous scholarship cannot explain InsightSolutions' practices or the content of its work in the nonprofit sector. Consulting firms like InsightSolutions and other intermediary organizations are traditionally considered agents of institutional diffusion--"carriers" of ideas and fads into new settings (Faust 2012; Marshall and Suarez 2014; Hwang and Bromley 2015)--and instruments of normative isomorphism (DiMaggio and Powell 1983). In particular, Sahlin-Andersson and Engwall (2002) described consultants as carriers of management knowledge into new organizations and fields. Correspondingly, in the nonprofit sector consultants are understood as intermediaries that facilitate rationalization in nonprofits, contributing to nonprofit homogeneity (Hwang and Powell 2009:293, Hwang and Bromley 2015). While the characterization of consultants-as-carriers has been questioned in recent years (e.g. Sturdy et al. 2009b), most studies of institutional diffusion focus on the *targets* of diffusion (i.e. specific organizations, organizational fields, national contexts) (Abrahamson 1991; Kennedy and Fiss 2009; Fiss and Zajac 2004) or the diffusion of particular models (e.g. Patterson and Kaufman 2016), rather than the *agents* of diffusion. Additionally, existing studies of management consulting as an occupation focus primarily on large firms that consult for corporations (e.g. Strang, David, and Akhlaghour 2014; Gill 2013; Abrahamson and Fairchild

1999; Saint-Martin 2000; Meyer 2002) and provide only limited insight into consultants to nonprofits' practices or the nature of their work in the nonprofit sector. There are no prior academic studies, to my knowledge, of consulting to nonprofits.

This dissertation addresses this gap. Via a mixed-methods study of the organizational practices of consulting firms and their relationships with client nonprofits, I show that the relational practices by which consultants produced recommendations for nonprofit practice yield a more complex picture than the consultants-as-carriers trope implies. Existing literature suggests that consultants might contribute to inter-organizational homogeneity by looking to similar exemplar organizations across clients and recommending consistent structures and practices, especially managerial strategies, across organizations. In my research, I found that consultants *did* reproduce some ideas consistently across clients. They promoted general ideas and language associated with rationalization, such as formal organizational structure, a clear identity, and a narrow organizational focus. Additionally, consultants consistently suggested that clients emulate existing practices of peer organizations, and consultants' work consistently reproduced unequal relationships between organizations of different types and between types of organizational stakeholders--the people involved in nonprofits' work. Conversely, there were some things, such as mission statements, that consultants felt should *never* be uniform, and options for clients' specific programs and strategies were, naturally, tailored to organizations' unique identities and needs.

Crucially, however, even when consultants promoted consistent ideas across clients, their work processes yielded variation, rather than homogeneity, in the options and practices consultants recommended to nonprofits. Consultants customized their frameworks and mixed consultant-produced data with client perspectives, using their tools to spark discussion rather

than prompt direct decision-making. And by defining unique peer and stakeholder groups for each client, consultants guided clients to distinct options that corresponded to clients' particular peers. Taken together, consultants' practices yielded variation in the recommendations for organizational structure and managerial strategy[2] that emerged from their engagements, rather than standard prescriptions that contributed to inter-organizational homogeneity.

As a whole, this dissertation shows that the role of consultants--and, likely, other intermediaries--in institutional diffusion is multifaceted. Rather than acting as carriers of ideas, consultants synthesized information and perspectives from different sources, inducing variation into their recommendations in the process. This complexity implies that we should not be surprised that cases of complete and rapid institutional diffusion are rare. In the course of making an argument about consulting, this dissertation also contributes a more detailed picture of consultant-driven rationalization of nonprofits, and consultants' role in such rationalization. In the remainder of this chapter, I will define and contextualize consulting in the nonprofit sector, outline these arguments--about institutional diffusion and nonprofit rationalization--in more detail, and provide an overview of the dissertation's methods and chapters.

A Brief History

In 1969, the Association of Consulting Management Engineers offered the following definition of management consulting:

> Management consulting is the professional service performed by specially trained and experienced persons in helping managers identify and solve managerial and operating problems of the various institutions of our society […] This professional service focuses

[2] Both here and throughout this dissertation, by "organizational structure" I refer both to formal organizational structure (e.g. organizational charts, roles and responsibilities) and to nonprofits' programmatic structure (e.g. program type and delivery model). By "managerial strategy" I refer to practices related to decision-making and goal-setting, methods to track progress, and general approaches to taking action on organizational goals. These two concepts at times overlap with one another.

> on improving the managerial, operating, and economic performance of these institutions. (Kipping and Clark 2012:1-2)

Management consultants are independent individuals and firms that are hired by organizations to carry out and facilitate management-related projects and services and deliver reports and recommendations, generally on a fee-for-service basis.

Some scholars trace the emergence of management consulting to Taylorism and the scientific management movement of the early 1900s, which focused on workflow efficiency gains (Ruef 2002:76). Others argue that early engineering and accountancy firms were the most direct precursors of modern management consulting (McKenna 2006:13). According to Christopher McKenna, these consultants offered small corporations economies of knowledge--consultants gave corporations fast and cheap access to organizational innovations corporations could not pursue on their own. As business schools grew, the management consulting field differentiated from its roots in accounting and engineering (Ruef 2002:77). These schools produced ever-increasing numbers of generally-trained managers, and gave the field legitimacy through university affiliation (David 2012).

Legislation, notably the Glass-Steagall Act of 1933 prohibiting banks from engaging in consulting, accelerated management consulting industry growth by opening unchallenged jurisdiction for consulting firms. Around this same time, key innovators separated the practice of management consulting from specific technical services by creating the "generalized management audit" that could be conducted by junior firm members to produce knowledge for clients at a low cost to consulting firms (David 2012:78). As the field of management consulting grew, further acceleration occurred through additional regulatory change,[3] the diffusion (partially

[3] An example was the passage of the Equal Employment Opportunity Act in 1972, that opened space for consultants to advise managers on how to reorganize their work and hiring procedures to comply with new regulations.

via consulting firms) of managerial ideas that suggested that management theory could be separated from technical knowledge, and corporate downsizing, which led managers to develop broadly-applicable expertise because they could not depend on a particular firm for their long-term livelihood (David 2012:81-83). The concurrent expansion of the business press raised awareness of the consulting industry and generated cycles in management fashion, which in turn created demand for consulting services.

Management consulting spread from the private to the public sector in the 1980s via the rise of "new managerialism," a paradigm that assumed that the same techniques ought to apply to the public and private sectors (Saint-Martin 2000). This movement espoused:

> An emphasis on the delegation of authority; a shift from process to results in controls and accountability mechanisms, particularly through the development of quantitative methods of evaluation and performance measurement; the disaggregation of public bureaucracies into managerially autonomous agencies whose responsibilities are defined by "contracts;" and a "consumerist" bias expressed through a new focus on the quality of services provided to the citizen consumer. (Saint-Martin 2000:2)

Under the assumption that external intervention was necessary, public officials turned to for-profit management consulting firms to advise attempted implementation of these ideas; consultant-facilitated knowledge was legitimated by these firms' expertise in the for-profit world (Saint-Martin 2000). Another major contributor to consultants' expansion to the public sector was the emergence of "governance by contract" paradigms in which government services were devolved to private entities (Smith and Lipsky 1995).

Management consulting's penetration into the nonprofit sector was partially unrelated to consultants' work with government (McKenna 2006). According to McKenna (2006), the prominent firm Cresap, McCormick and Paget, recognizing the nonprofit sector as an unexploited client base, began marketing its services in the 1950s to large, prominent nonprofit organizations like universities. By applying similar processes, diagnosing similar problems, and

offering similar sets of recommendations to a range of prominent nonprofits, the firm contributed to the perception of nonprofit organizations as a distinct and coherent sector of organized activity.[4] Consulting activity in the nonprofit sector expanded with the corporatization of areas of nonprofit practice, particularly healthcare.[5]

Sociological Perspectives on Management Consulting

Expertise and Professions

Out of this trajectory and in the context of the rising importance of the service sector to Western economies, academic interest in management consulting has flowered. Scholars of management consulting, writing primarily from Europe, regard these firms as quintessential "knowledge-intensive firms," defined by Alvesson (2000) as "companies where most work can be said to be of an intellectual nature and where well-educated, qualified employees form the major part of the workforce" (1101). While some consultants charge hefty fees for their services, the substance and quality of their work is often unclear and difficult to evaluate. Scholars agree that management consulting does not rest on a basis of traditional professionalism, in that consultants' expertise does not stem from possession of a particular credential (Saint-Martin 2000) and is instead often derived from reputation. Historically, consulting firms have been considered either con artists, selling companies substance-less solutions at outrageous prices, or bringers of positive organizational change (Gunter, Hall and Mills 2015); correspondingly,

[4] Consulting firms were not, however, the only or most prominent contributor to the nonprofit sector's formation. Debate about the role of tax-exempt social-purpose organizations in the United States dates to the country's early days, as part of the larger struggle around the creation of democratic institutions. Additionally, post-World War II governmental policy was central to the consolidation of the nonprofit sector as coherent and cohesive, culminating in the publication of the Filer Commission reports in 1975 (Hall 1992:78).

[5] This timeline is corroborated by prominent consulting firms, which have reported that the consulting industry emerged in the early 1960s and grew in the 1990s (Connolly and York 2003).

scholars emphasize consultants' use by organizations to generate legitimacy for managerial decisions and current practices or facilitate organizational change (Sahlin Andersson and Engwall 2002). Some scholars link management consulting to neoliberalism, arguing that the rise of management consulting aligns with a global trend that "delegitimizes the traditional professional model, celebrates markets and networks," and emphasizes entrepreneurialism (Faust 2012:9-10).

Consultants in Institutional Diffusion

Institutional theory treats consultants and other third parties as "carriers" of new approaches and agents of normative isomorphism (field-level structural homogeneity), as they actively disseminate notions of "the right way to do things" using often-standardized templates for evaluating and diagnosing organizational problems and solutions (Wright, Sturdy, and Wylie 2012). In this vein, Meyer (2002) argued that the rise of consultants is related to processes of globalization that promote the diffusion of management ideas, including a notion of "agentic, empowered, and managed organizations that function as rational and dramatic actors" (35). Sahlin-Andersson and Engwall (2002) described consultants as "carriers" of management knowledge--organizations that (along with business schools and the business press) transport and translate management knowledge into new settings (see also Faust 2012). Consultants can also be instruments of coercive isomorphic pressure, as the use of consultants in the nonprofit sector is often prescribed by funders. Relatedly, consultants can be considered institutional entrepreneurs, individuals who work to align organizational forms and wider societal institutions, and to translate macro-institutional shifts into organizational form (Haveman and Rao 1997; Hallett and Ventresca 2006). Correspondingly, consultants' work is frequently explained as

"translating" generalized prescriptions about management into new settings by editing standard approaches to align with the particularities of new contexts and facilitate uptake (Sahlin-Andersson and Engwall 2002). Across these perspectives, consultants contribute to processes of change in organizational fields by facilitating the diffusion of ideas, structures and practices across organizations and promoting isomorphism and homogeneity (DiMaggio and Powell 1983). More specifically, these scholarly traditions position consultants as members of a set of organizations that contribute to the transmission and translation of business ideas and fads into organizations, particularly as carriers, translators, and commodifiers of management knowledge.

This "consultants as carriers" notion has encountered some skepticism, most notably in Sturdy et al. (2009b). Sturdy and his coauthors supplied preliminary evidence that consultants cannot be described cleanly as "outsiders" that bring new ideas into organizations--rather, consultants and their clients continually produce and reproduce insider- and outsider-ness in the course of project work. Correspondingly, Sturdy et al. suggested that the knowledge consultants bring to client organizations is not as "new" or "strange" as is typically assumed. Rather, knowledge in consulting processes is co-produced in the course of interaction--consultants have more "insider" knowledge and clients more "outsider" knowledge than assumed.[6] Sturdy et al. concluded that there is more potential for shared interests or alliances between consultants and clients in consulting processes than is typically assumed. They argued the importance of their findings for identifying the bridges and barriers encountered in organizational learning via consulting--in other words, the conditions and mechanisms by which clients are able to learn from and produce knowledge with consultants.

[6] For example, consultants gain so-called "insider" knowledge through repeat engagements and work for various similar organizations, and clients gain so-called "outsider" knowledge by learning about management fads.

Sturdy et al.'s work is helpful in suggesting that extant assumptions about consultants as carriers are incomplete and insufficient, but their analysis does not illuminate *how* the complexity they find in consultants' roles and identities influences the knowledge and recommendations consultants construct via the consulting process. More broadly, studies of consultants' role in institutional diffusion have generally neglected to investigate how consultants' "translation" work plays out in practice, and how editing ideas to cohere with the rules of new contexts affects consultants' recommendations and the broader circulation of management knowledge (Faust 2012). Sturdy et al.'s analysis, limited to the UK corporate and public sectors, also relies on assumptions that consultants act as agents of diffusion and change, with their insider and outsider status simply functioning to influence how and the degree to which they succeed in this goal. These scholars do not trace their findings' implications for the nature of the ideas consultants produce. Indeed, Sturdy et al. suggested, "we still do not have a good understanding of what consultants and clients do […] especially what they do jointly" (Sturdy et al. 2009a), or whose perspectives are privileged in consulting processes (Sturdy et al. 2009b). Faust (2012) echoed the need for studies of the "interaction process between consultants and their clients in ongoing projects (18)" to elaborate "the contestation and negotiation of knowledge in front-line diffusion" (11; Sturdy 2002).

Contribution of this Dissertation

This dissertation addresses this gap by tracing consultants to nonprofits' day-to-day practices over the course of client engagements, to understand both the process of strategy consulting in the nonprofit sector and the ideas and recommendations that consultants produce, shape, and communicate in the course of consulting engagements. Consistent with Sturdy et al.

2009b's findings, I found that consultants were not *carriers* of management knowledge into the nonprofit sector. By analyzing consultants' relational practices with clients, I show that rather than diffusing management fads or standard models that promoted inter-organizational homogeneity, consultants to nonprofits generated *variation* in the ideas and practices they recommended to their clients, reinforcing the heterogeneity of the nonprofit sector.

Of course, consultants *did* reproduce some consistent ideas across clients. They disseminated language and general ideas associated with rationalization, such as the importance of formal organizational structure, decisive leadership, a clear organizational identity conveyed via a mission and vision, a narrow organizational focus and means-end relationships between resources, activities, and outcomes, and the use of data in decision-making. Consultants' work across clients reproduced existing hierarchies between types of organization (large vs. small organizations and funders vs. nonprofits), and between different organizational stakeholders--those with power *over* nonprofits and those *over which* nonprofits had power. Consultants also consistently suggested that clients adopt the existing practices of peer organizations. Conversely, consultants suggested that some things should *never* be uniform--consultants' emphasis on focus and nonprofit identity led them to craft unique mission statements for their clients, and consultants tailored options for clients' specific programs and strategies to organizations' unique identities.

Critically however, the consistent ideas consultants promoted across clients did not yield homogeneity in consultants' recommendations for management strategy and organizational structure--instead, consultants' work processes generated inter-client variation. In the course of their work, consultants applied standard tools and frameworks in non-standard ways, customizing their processes and mixing consultant-generated ideas with client representatives'

opinions and perspectives. Consultants also defined unique sets of relevant stakeholders and groups of peer organizations to which each client belonged, guiding their clients to distinct options for organizational structure depending on the unique peer set consultants identified. These practices introduced variation into consultants' processes, complicating their role in institutional diffusion and suggesting that rather than carrying ideas into new contexts, consultants synthesized information and perspectives from different sources to create their recommendations.[7] As I will suggest at the end of this dissertation, the field of consulting to nonprofits may have *evolved* to this state, moving from consultants as carriers of corporate management knowledge to synthesizers of ideas as the field matured and grew from its roots in corporate management consulting.

In elaborating consulting firms' complex role in institutional diffusion, I pay particular attention to their status as intermediary organizations alternately considered peripheral to or outside the field(s) of nonprofit activity. As Scott (1995) notes, intermediary organizations exercise significant influences on fields via, for example, issuing field-wide ranking schemes by which field members are organized. As outlined earlier, consultants are commonly considered intermediaries. However, rather than influencing the nonprofit sector via top-down evaluation schemes, consultants influenced nonprofit organizational field(s) by leveraging similar tools, ideas, and processes across interactions with multiple clients,[8] and, within individual projects, actively placing organizations in peer groupings. As consultants moved across the field, acting as

[7] This finding echoes other scholars' discoveries of variation in situations that were thought to produce homogeneity. See, for example, Zelizer's (1999) analysis of the effect of economic development on local and cultural distinctions in terms of currency usage and consumption. Also relevant is Mohr and White's (2008) argument about the dialectic between consistency and local variation in social institutions, illuminated via the cases of the Indian caste system and academia in the United States.

[8] Recall McKenna's (2006) historical argument that the prominent firm Cresap, McCormick, and Paget, by employing this strategy in the 1950s and 60s, contributed to the formation of the nonprofit sector as a distinct area of organizational activity.

temporary guides to--and "thought partners" in--organizational action, they reinforced the heterogeneous nonprofit field(s) they defined.

Management Consulting in Context

A Focus on Consulting to Corporations

Almost all scholarly work on consulting--as a profession or occupation, on consultants' roles in the flow of management knowledge (Suddaby and Greenwood 2001; Sahlin-Andersson and Engwall 2002), and on other topics--focuses on large, often multinational, management consulting firms that consult for corporations; the vast majority are situated in European contexts. Scholars cover significant ground in this area, including work on consultants' contributions to cycles of management fads (Abrahamson and Fairchild 1999; Strang, David, and Akhlaghpour 2014), the negotiation of client relationships (Bloomfield and Danieli 1995; Sturdy 1997; Sturdy et al. 2009b) and other internal and client-facing consulting practices (Prince 2014; Robertson and Swan 2003; Alvesson 1995), the social production of consulting knowledge (Hargadon and Bechky 2005; Prince 2014; Bloomfield and Best 1992), including how consultants frame and reframe clients' problems to fit consulting solutions and ensure future contracts (Bloomfield and Best 1992), and the production of new ideas (Anand, Gardner, and Morris 2007), consultant identity (Gill 2015; Merilainen et al. 2004), and consulting as contingent work (Barley and Kunda 2004).

Taken together, beyond framing consultants as carriers and translators of management knowledge, these studies 1) identify and dissect consultants' contributions to corporations--as providing managerial solutions or legitimacy for both client firms and firms' managers, as managing uncertainty for clients and simultaneously creating additional uncertainty through their

work; 2) point to the client-consultant interaction as a key analytical site in understanding consulting work (Alvesson 1995) and highlight the centrality of impression management and interpersonal work in consulting (Bloomfield and Best 1992; Sturdy 1997); 3) underscore that consultant-produced insights are socially produced and contingent; and 4) identify salient organizational practices, for example the "leverage" staffing model in which senior managers delegate the majority of client engagements to lower-level staff, who follow prescribed models to complete tasks (Merilainen et al. 2004) as well as common difficulties encountered in professional services work.

Like studies of corporate consulting, the handful of studies that consider consulting for government similarly focus on firms that specialize in corporations, largely in non-United States contexts (e.g. Sturdy et al. 2009b; Prince 2013; 2014; 2015; Saint-Martin 2000). Virtually no academic studies exist of consulting firms that focus on nonprofit organizations, perhaps due to the differences between the organization of such work in Europe and the United States.[9] The two partial exceptions include Marsh's 2008 study of women working as sole proprietor consultants in the British public and nonprofit sectors, and the work of Russell Prince, a human geographer from New Zealand. In analyses of the work processes of a cultural consulting firm in the United Kingdom (Prince 2013; 2014; 2015), Prince argued that in the public cultural sector consultants built networks to access resources, rendered incommensurable entities comparable through measurement, engaged in negotiations around acceptable evidence, and produced impressions of objectivity and definitions of the cultural sector through their work. He argued that firms focused on where the arts could be translated into exchange value by both consultants and clients. While

[9] There is, however, ample non-academic writing--pieces written by consultants and nonprofit professionals for other such professionals--about consulting to nonprofits. For example, in 2015 *The Foundation Review* released a full issue of articles on philanthropy consulting.

his focal firm served largely governmental clients, Prince's insights are germane to the United States nonprofit sector.

Limitations of Extant Empirical Work

Existing insights about consulting to corporations frame and inform this dissertation's investigation of consulting to nonprofit organizations--corporate consulting firms are a useful reference point in that they facilitate a focus on what is specific about the practices of nonprofit consultants. Indeed, some scholarship and reviews of literature on management consulting assert the importance of attention to the effect of disparate organizational and national contexts on how and in what form consultants and others import management knowledge into organizations (e.g. Sahlin-Andersson and Engwall 2002; Merilainen et al. 2004, Saint-Martin 2000). This work also suggests that the editing and translation work consultants perform when working with clients affects the nature of the knowledge they carry into organizations, and the effect of this knowledge in client organizations themselves.

However, even studies of management consulting in the public sector (e.g. Saint-Martin 2000) still focus on multinational consulting firms whose primary client base is corporations, and on the tight link between business schools and prominent consulting firms. That is, studies focus on how business knowledge is edited and transformed as it is transported to new territory. This research landscape contains an assumption that *management consulting is management consulting*. Beyond acknowledging the socially-constructed nature of consultants' ideas, current scholarship assumes that baseline consulting practices, sensibilities, and goals are uniform across sectors, if not across countries. This assumption perhaps stems from management consulting's

strong association with global processes of rationalization and neoliberalism (Faust 2012; Hwang and Powell 2009).

The assumption that management consulting practices and goals are consistent across sectors, however, is incongruous with the growth, in the United States, of consulting firms devoted exclusively to nonprofit organizations led by individuals whose expertise comes not only from business schools, but often from careers in the nonprofit and public sectors. In a preliminary analysis, Chapman (1998) suggested that consultants to nonprofits engage in more facilitation work and rely more heavily on consensus-building and facilitation skills than corporate consultants given the mission-oriented nature of nonprofit work, and that nonprofit consultants conduct more general-management-focused projects than corporate consultants.

This dissertation investigates and elaborates on such assumptions, illuminating the specific practices of consultants to nonprofits and the relationship between consultants' practices and the recommendations they produce for nonprofits. As my analysis shows, a close examination of the practices of consultants to nonprofits illustrates that consultants' efforts to synthesize information and perspectives from different sources during strategic planning for nonprofits produced variation, rather than consistency, in the organizational structures and managerial strategies they recommended to different clients. This variation suggests that it is insufficient to characterize consultants as carriers, translators, or commodifiers of management knowledge originating in the corporate sector. The consistency in content, process, and outcome implied in these terms were markedly absent in the contemporary nonprofit case, though this situation may have differed in the early years of the consulting to nonprofits field. Importantly, my study cannot confirm whether this finding can be extended to corporate consulting--whether consultants to nonprofits are synthesizers while consultants to corporations are carriers of

management knowledge. However, Sturdy et al.'s (2009b) findings about consultants' complex roles across sectors suggest that while the particularities of the nonprofit case are significant, my general argument may hold in other contexts.

Consultants and Nonprofit Rationalization

To anchor my investigation of the role of consultants in institutional diffusion and the particular case of consultants to nonprofits, I focus my argument on a core contention in the sociology of nonprofit organizations--that consultants are drivers of rationalization in the nonprofit sector. In this section I position consulting within scholarly work about the nonprofit sector, framing the relationship between consultants and rationalization as a particular, but independently important, vantage point from which to investigate consultants' broader role in diffusion and change.

Rationalizing "Organized Anarchies"

Cohen and March (1986), in a study of American universities, described universities as "organized anarchies"--organizations characterized by goal ambiguity, unclear technologies and processes, and sporadic member participation. Goal ambiguity, they explained, results when organizations' goals are unclear, impossible to accomplish, or not shared across the organization. For most such organizations, they argued, "the level of generality that facilitates acceptance destroys the [accomplish-ability of] or clarity of the goal. The level of specificity that permits measurement destroys acceptance" (16). In addition to goal ambiguity, Cohen and March argued that leaders of these organizations also face ambiguity of success--unclear methods for

evaluating effort (16). Ambiguity of success is related to a lack of precise measurement tools to assess one's performance or the performance of one's organization (19).

In a related paper, Cohen, March, and Olsen (1972) argued that organized anarchies operate as "collections of choices looking for problems, issues and feelings looking for decision situations in which they might be aired, solutions looking for issues to which they might be an answer, and decision-makers looking for work" (1). Stated otherwise, problems, solutions, decision-makers, and decisions are not logically connected in these organizations; decisions do not reflect a process for solving problems--rather, problems, solutions, and choice opportunities come together to produce organizational action only by chance (16). Cohen, March, and Olsen's arguments have been broadly extended to the nonprofit sector as a whole. As such, the work of consultants in the nonprofit sector can be seen as both responding to the characterization of nonprofit organizations as "organized anarchies" and also shaped by the goal and success ambiguities characteristic of the sector on which consultants focus.

In this context, this dissertation is situated within the interdisciplinary literature about the *rationalization* of nonprofit organizations and these organizations' corresponding shift toward their for-profit counterparts--put otherwise, nonprofits "becoming businesslike" (Maier, Meyer, and Steinbereithner 2016). "Becoming businesslike" can be understood as the adoption by nonprofit organizations of the rhetoric, core organizational structures and processes, and goals of for-profit corporations, resulting in overall rationalization and an increasing reliance on corporate management knowledge as the source of best practices for managing nonprofit organizations (70-71). Scholars assert a variety of causes for this phenomenon--endogenous factors, including field characteristics, board makeup, and grantmakers, and exogenous ones, including global

managerial-rational ideologies, political reforms, economic conditions, and actors like consultants, who carry business ideas into nonprofit organizations (73).

In a 2009 study of the relationship between professional management and organizational rationalization, Hokyu Hwang and Walter Powell argued that nonprofit rationalization, which they defined as "the integration of formalized roles and rules around unified sovereignty, entailing the construction of nonprofits as 'actors' with clear identities" (272), is accomplished by the increasing activity of a new kind of managerial professionals in nonprofit organizations--those with specific training in or knowledge of administration and management, beyond or instead of substantive expertise in the content of organizations' work. These managerial professionals act as agents of normative isomorphism--they share common norms and training, facilitating the spread of common standards and methods for nonprofit practice. They can influence nonprofits through work as internal managers or "external proselytizers who urge the diffusion of business tools"--often funders or consultants. In their quantitative investigation of this theory, Hwang and Powell found that receipt of foundation grants, management by professionals (defined as paid personnel), and executive management training predict organizational use of rationalized practices--program assessment and benchmarking, and the use of consultants. Facilitated by consultants, the expansion of managerialism in nonprofits, the authors argued, is leading to increasing homogeneity in the nonprofit sector, and tension between substantive content and managerial orientations in nonprofits.

Hwang and Powell's 2009 study points to consulting firms as key actors in the diffusion of corporate-inflected management ideas into nonprofits.[10] As these scholars put it,

[10] McKenna (2006) made a similar point--he argued that consultants contributed to the formation of the nonprofit sector by applying similar tools and making similar recommendations to a variety of large nonprofit organizations.

> Consultants have become highly active in the nonprofit sector, facilitating the spread of projects such as program assessment, public relations, fundraising, and earned-income efforts. Established consultancies […] have set up nonprofit branches or institutes, and nonprofit consultancies and intermediaries have also grown rapidly […] Though consultants may be involved with different tasks, their use reflects a widespread effort to improve productivity and render nonprofit activities more methodical. These varied practices and efforts contribute to both an image and a mind-set. (272)

In addition to identifying consulting firms as important facilitators of the professionalization of nonprofits, Hwang and Powell also postulated more fundamental effects of this shift on the nonprofit sector: "as these formerly expressive settings become more calculable and instrumental, broader expectations about what practices are appropriate and modern are reshaped" (293). Nonprofit rationalization, then, is a clear example of the kind of influence institutional theory purports consultants to have--as agents of the diffusion of rationalized practices across nonprofit organizations, consultants are thought to contribute to consistent, profound, and wide-ranging changes in the nonprofit sector.

Defining Rationalization on the Ground

While framing consultants as facilitators of rationalization in nonprofits, studies of rationalization like Hwang and Powell (2009) stop short of specifying what rationalization actually looks like on the ground--the specific organizational practices and structures, supposedly diffused across organizations by consultants and other actors, that "count" as rationalization (See Brunsson and Sahlin-Andersson 2000 for some ideas), and *how* rationalization contributes to homogeneity in the nonprofit sector. It is this specificity about the ideas and practices that emerge from consultant-driven diffusion that is lacking in existing accounts of consultants' work (e.g. Sturdy 2009b).

In this context, studies of the use of applied research in nonprofits suggest that consultants' influence on nonprofit rationalization may not be so straightforward. Writing in the late 1970s and early 1980s, Paul DiMaggio and Michael Useem found that instead of commissioning research (often from consultants) to inform decision-making, nonprofit arts organizations conducted and used applied research for political reasons--to support requests for funds or appease powerful stakeholders (DiMaggio and Useem 1980). As such, research was reported to be most useful when results reinforced pre-existing beliefs and did not conflict with vested interests. Because it was rarely designed with particular decisions in mind, this research affected decision-making only circuitously--by becoming a symbolic resource for particular points of view, or identifying problems through the research process. As DiMaggio and Useem put it,

> Rather than helping managers to make specific decisions, [audience studies] usually served to reinforce opinions, persuade outsiders, or focus attention on some general problem area or set of goals. The contribution of research to the managerial process appears to be suggestive or symbolic rather than definitive. (204)

DiMaggio and Useem attributed this outcome to the undeveloped nature of the nonprofit applied research field and the nature of nonprofit arts organizations as "organized anarchies" with unclear goals (206).

The influence of this goal ambiguity on consultants' work was nicely summed up by Kennard Wing, a Philadelphia-based consultant, in an essay offering seven "issues" facing the field of nonprofit capacity-builders. Wing (2004) asked

> How can an abstract concept [capacity building] be concretely measured? […] How can we measure performance improvement when we cannot measure performance? […] Against whose goals should we measure improvement? […] What can be done about unrealistic timetables for both capacity building and its evaluation? […] How can we document how soft people relate to hard systems? […] Should we measure participants' behavior change or clients' internal learning?

Despite indications that consultants' influence on nonprofit rationalization may not be self-evident, literature about nonprofit rationalization lacks insight into *how* consulting firms produce recommendations for nonprofit practice, and how consultants' practices *influence, contribute to,* and provide opportunities to *better specify* rationalization in nonprofits.

In this dissertation I show that consultant-facilitated rationalization of nonprofits is much less consistent and much more varied than Hwang and Powell (2009) suggested. Consistent with the assessments of Hwang and Powell (2009) and Meyer (2002), consultants leveraged common approaches and conceptual frameworks across their client work that framed nonprofits as actors with narrow foci and clear identities, that engaged in data-driven decision-making and built means-end relationships between resources, activities, and outcomes. However, when applying these frameworks and approaches in daily relational practice, consultants departed from these consistent messages by customizing their tools and deferring to the expertise of nonprofit workers, thus producing varied recommendations for management strategy via nominally standard processes. Additionally, via the characteristics of their engagements, consultants promoted a focus on formal organizational structure, inter-organizational networks, and decisive leaders in nonprofits. However, the distinct peer and stakeholder groups that consultants identified for each client meant, for the most part, that consultants promoted different formal structural elements to different clients. Again, rationalization did not yield homogeneity in consultants' recommendations.

In sum, rather than disseminating a consistent set of rationalized practices that homogenized nonprofits' organizational structures and management strategies, dissolving inter-sectoral boundaries and distinctiveness (Meyer 2002; Maier, Meyer, and Steinbereithner 2016), through their work processes consultants produced varied recommendations for nonprofit

practice. Therefore, this dissertation suggests that nonprofit rationalization is much less uniform, consistent, or complete than other scholarly accounts suggest. As such, consultants' role in such rationalization recalls DiMaggio and Useem's (1980) findings. Consultant work, rather than serving as "objective" recommendations that support decision-making, is intimately intertwined with both consultants' and client nonprofits' opinions, pre-existing beliefs, and vested interests, with a circuitous effect on decision-making.

Theoretical Tools

In addition to the institutional literature that framed this introduction, to amend theory about consultants' role in nonprofit rationalization and institutional diffusion I draw from sociological traditions focused on the social context and dynamics of organizational life--work on standards and classification from Science and Technology Studies and relational work in economic sociology.

Relational Work in Economic Sociology

First, to investigate how consultants build and maintain relationships in the course of their work, I leverage Viviana Zelizer's relational economic sociology, which focuses on how people construct and maintain meaningful social relationships via economic transactions (2010; Bandelj 2020). I use this theory to analyze how consultants marked and attempted to maintain relationships of solidarity and genuine support with their nonprofit clients during shared work. To build relationships with nonprofit clients, consultants moralized money, which entailed discounting prices, nickel and diming their own expenses, and providing labor beyond their contracted amount. To mark the consultant-client relationship as one of shared goals, consultants

also engaged in identity talk, highlighting their commitment to issues like social justice and distancing themselves from a profit motive even while operating within for-profit businesses. Consultants constantly endeavored to frame and adjust their work to maintain positive and genuinely supportive relationships with their clients and align themselves with mission-oriented work and identities. I analyze how, via these and other strategies, consultants engaged in relational work to define the nature of their relationships to nonprofit organizations and choose and legitimate actions appropriate to these relationships, working to bridge the differences between the two sectors in which they worked.

Standards and Classification in Science and Technology Studies

Second, to analyze how the characteristics of consultant work processes and the overall consulting field shaped client recommendations, I turn to work on standards and classification from Science and Technology Studies (STS). This tradition, anchored by Bowker and Starr's 1999 volume on major historical and social classification systems, reveals how classification systems such as spreadsheets, checklists, and forms are shaped by the social contexts of their production in ways that center certain perspectives and exclude or marginalize others. Such systems in turn embed similar biases into the social contexts in which they are used. This literature informs my analyses of power dynamics between consulting firms, clients, and funders in consulting work, and how the characteristics of consultants' tools, processes, and the consulting field as a whole shaped the recommendations consultants delivered to clients. I detail how consultants' efforts to help their nonprofit clients were affected--and sometimes subverted--by the characteristics of their work processes, producing variation, rather than homogeneity, in consultants' recommendations to clients.

Analytical Focus and Methodological Overview

This dissertation's focus on the social and relational process of consulting work in the nonprofit sector points to professionals' everyday *practices* as the focal point of my analyses (Lave and Wenger 1991). As Lawrence and Suddaby (2006) explained, "to focus on practice is to focus on the 'internal life of process.' Whereas a process-oriented theory articulates a sequence of events that leads to some outcome, a practice theory describes the activities of individuals and organizations who are working to effect those events and achieve that outcome" (2006:219, citing Schatzki et al. 2001:2). These scholars continued, explaining that a "practice perspective highlights the […] work of actors which may or may not achieve [their] desired ends and which interact with existing social and technological structures in unintended and unexpected ways" (219). As Karin Knorr Cetina succinctly explained, following this approach the researcher should place herself amongst the "stream of practices from which fact construction arises" (1995:151). By attending to the daily organizational practices by which consultants to nonprofits produce and communicate ideas about nonprofit work, the institutions, exclusions, and decisions that structure these ideas can be unearthed and the social and relational work they perform identified.

It is important to note that my aim is not to assess the accuracy of consultant-produced recommendations, or their benefit or detriment to clients or the larger nonprofit sector, but rather to understand how these recommendations are produced and become consequential for people and organizations. Additionally, I focus in this dissertation on the outputs of consulting work--the options, recommendations, and ideas about nonprofits and their practice that consultants

produced--rather than consultants' tangible effects on nonprofit practice after the conclusion of their engagements.

My research design consists of 1) ethnography, conducted over 14 months at three strategy consulting firms that serve nonprofit organizations, 2) interviews with consultants and their clients, and 3) a survey of foundations in partnership with the Foundation Center. Between July 2017 and July 2018 I conducted a year of ethnographic fieldwork at a typical nonprofit-serving consulting firm in terms of organizational size, business model, reputation, and service offerings, with the goal to understand the day-to-day life of a typical firm. During fieldwork I performed a participant-observer role--while studying the firm I contributed to projects as an unpaid research analyst, working 3 to 4 days per week. To contextualize this fieldwork, I also completed approximately four weeks of observation at an arts-specific firm of similar size to my primary field site firm and two weeks of observation in a medium-large generalist firm.

I supplemented my ethnographic data with a total of 180 semi-structured interviews with four sets of respondents, and a field-mapping survey. At each firm in which I conducted fieldwork, I interviewed firm employees, for a total of 55 interviews. I also conducted interviews with 18 clients of my primary field site firm and with staff of 20 foundations that had hired or worked with consultants in the recent past. Additionally, I conducted a total of 87 interviews with 62 other consultants to nonprofits, with interviewees selected to ensure representation of consultants of different types, from sole proprietors to large firms. Finally, I conducted a survey of philanthropic foundations, which broker many nonprofit consulting engagements. The survey was distributed via Qualtrics in partnership with the Foundation Center, and yielded 92 valid responses out of 1,589, for a response rate of 6%.[11]

[11] This is a dismal response rate, and as such I largely did not use the results of this survey in this dissertation. I explain this decision in more detail in the Methods section.

This dissertation contributes to literature on nonprofit organizations by showing that consultant-driven rationalization of nonprofits is more heterogeneous and varied than previous literature suggests. Correspondingly, by using nonprofit rationalization as a lens by which to better understand consultants' role in institutional diffusion, I show that rather than contributing to inter-organizational homogeneity by carrying management ideas into new contexts, consultants synthesized information and perspectives from multiple sources in the course of their work, producing varied, rather than consistent, recommendations for organizational structure and management strategy across organizations. In doing so, consultants reinforced the heterogeneous character of the contemporary nonprofit sector, rather than making nonprofits more similar to each other, or to other organizations. As such, the case of consultants to nonprofits provides a new perspective on the complex nature of institutional diffusion as a social process, helping explain why complete and rapid institutional diffusion only rarely occurs.

Outline of the Dissertation

Chapter 2 provides an overview of the field of consulting to nonprofits. In it I outline the salient characteristics of the field, including a discussion of the major dimensions of differentiation between firms. The chapter is grounded in ethnographic descriptions of the three firms at which I conducted fieldwork. **Chapter 3** provides a detailed description of the methods I employed in this dissertation, the rationale for selecting the three firms described in the previous chapter, and the contributions of each methodological element to the argument.

Chapter 4 is the dissertation's first analytic chapter. In it I analyze how consultants conducted research about their nonprofit clients, and how consultants' research process shaped the organizational structure and management-related ideas consultants transmitted to nonprofits.

I show that consultants' research processes introduced variation into the options consultants offered clients, and illuminate the mechanism by which this occurred--unique peer and stakeholder groups that consultants defined for each client. Consultants' decisions to make their research efficient and accomplishable shaped the relevant options that emerged from their research, pushing clients toward replicating common practices in addition to making nonprofits more rational. In this context I show that via the distinct peer and stakeholder groups consultants defined for each client, consultants promoted *mosaic* replication and rationalization in nonprofits, rather than homogenizing nonprofit practice. Consultants rationalized nonprofits and promoted copying existing programmatic structures *within* clients' peer groups, while generating variation *between* these groups. This yielded an irregular mosaic of practice across the field.

Chapter 5 focuses on consultant-facilitated strategic planning meetings, in which consultants and clients came together to review the results of consultants' research and prioritize among resultant options. I specifically analyze two tools that consultants often brought to meetings--conceptual frameworks and data about client organizations. I analyze both the meanings encoded in consultants' tools and the ways consultants *used* frameworks and data in meetings with clients, showing that while consultants' conceptual frameworks and use of data were *meant* to convey uniform ideas about good nonprofits as highly-focused and tightly-coupled instruments of social impact, in deploying these tools in client meetings, consultants customized frameworks to clients' particularities, "smell checked" data against lived experience, and used *data as an object* to spark discussion. In doing so consultants produced additional variation in the managerial strategies they delivered to clients, as consultant-generated findings and options mixed with client representatives' ideas, opinions, and group dynamics in the course of discussion.

Chapter 6 departs from the previous two chapters' focus on the content of nonprofit strategic planning processes, and instead analyzes the internal organizational practices of consulting firms that serve nonprofits. I specifically focus on consultants' efforts to define relationships of genuine support and solidarity with their nonprofit clients, given that the consulting firms I studied were for-profit businesses largely staffed by professionals with nonprofit backgrounds. I analyze three interlocking sets of practices--identity talk, moralizing money, and redefining consulting as carework--that consultants used to define the actions and transactions appropriate to their client relationships, and, in doing so, legitimate their work at the border of the for- and nonprofit sectors. I show that via these practices, consultants shifted the institutional field to which they were oriented from management consulting to the nonprofit sector. This situation, however, had consequences--as they worked to mark and maintain genuinely supportive relationships with nonprofits, consultants often subverted their own bottom lines and replicated classic nonprofit problems in their own firms.

Chapter 7, the last substantive chapter of the dissertation, places my argument in context by focusing on relationships *between* organizations in the wider field of consulting to nonprofits. By analyzing three sets of relationships in the consulting field, I show that hierarchical inter- and intra- organizational relationships led consultants to reproduce hierarchies between nonprofit organizations even while acting as agents of variation in nonprofit practice. I first argue that the uneven power relations between nonprofits, consultants, and funders led consultants to serve as conduits for funder ideas into nonprofits' plans, perpetuating funders' power over nonprofit activity. Second, I show that the field of consultants to nonprofits was organized via a multifaceted hierarchy based on status, expertise, and gender, leading consultants to reproduce similar hierarchies in the nonprofit sector via a division of labor between large and small

generalist firms. Finally, similar hierarchies characterized work *within* individual consulting firms; I show how consultants used these hierarchies to explain negative client interactions and to solve problems with similarly hierarchical clients. Across these cases, I show that consultants, rather than rendering nonprofits more similar, mirrored and reproduced hierarchies in the nonprofit sector concurrently with producing inter-organizational variation.

Chapter 8 summarizes my findings and concludes the dissertation. In it I suggest that my argument represents a particular point in time in the history and evolution of the field of consulting to nonprofits. While contemporary consultants to nonprofits produced variation, rather than homogeneity, in nonprofit organizational structures and management strategies, the field of consulting to nonprofits may have *evolved* to this state as it matured and grew from roots in corporate consulting.

Chapter 2
Oracles, Facilitators, and Point People
The Field of Consulting to Nonprofits

This chapter provides an overview of the field of consulting to nonprofits and its salient characteristics, including a discussion of the major dimensions of variation among firms in the field. Consulting firms that serve nonprofits can be considered peripheral members of the field(s) of nonprofit activity, *and* a nascent field of their own. They have similar organizational structures to corporate management consulting, and like corporate management consulting firms, lack standard markers of professionalism, turning to reputation and networks as sources of legitimacy. However, consulting to nonprofits *differs* significantly from corporate consulting in the implicit or explicit inclusion of funders as a third party in most client engagements.

Across the field, consulting firms that serve nonprofits vary in organizational form, services, clients, the content of their work (encompassing the distinction between generalist firms and subfield specialists), and firm size. Of these characteristics, size, combined with content focus, has an outsize influence in delineating segments of providers in the field. In my research, larger and smaller consulting firms tended to employ distinct approaches, with the former deductive and the latter more inductive. They used different types of data and conducted different analyses, with large firms mustering quantitative models, small generalist firms leveraging qualitative data, and small subfield specialists using both. They had access to different types of people: large firms leveraged networks of national experts and funders while small firms' networks were local or subfield-specific. They also claimed different knowledge. Together, these distinctions added up to major differences between consulting providers of different size and type, in a field structured by funder influence and unclear standards.

In this overview chapter, I ground my discussion in the cases of three firms in particular--InsightSolutions, FocusImpact, and ArtsNow. I begin with vignettes about these three firms, to bring the work of consulting to nonprofits and the differences between firms to life. I then review the overall characteristics of the consulting field, including firm structure and composition, the methods by which consultants pursue legitimacy, consulting firms' relationships with clients and payors, and consultants' intermediary role. I then detail the various dimensions of variation *between* firms in the field, covering consultants' organizational forms, services, clients, the content of their work, and the size of their organizations. Many of the themes I outline inform arguments I make later in the dissertation.

InsightSolutions

> Jim started InsightSolutions after a long career in city government. As he put it, "I was committed to social change, and I was trying to figure out how to do that […] having run a complex organization and been in a city government. What drove me to create InsightSolutions was this interest in social change." The firm, incorporated as a for-profit business, grew slowly because, as Jim put it, "I did a lot of the work myself, but I knew I liked bouncing ideas off other people and having colleagues." Jim attracted a few more senior nonprofit professionals like himself before adding support staff. At its 25-year anniversary, InsightSolutions had served hundreds of nonprofits, public agencies and philanthropic foundations and had 12 full-time staff who were mostly women, including a recently-hired managing director, Anita, who was brought on to streamline the firm's internal processes and improve its financial health. InsightSolutions' four partners and 8 other staff had degrees in social work, international development, communication, and education, and had worked in nonprofits across the region. InsightSolutions offered a suite of services--strategic planning, business planning, organizational assessment, executive search, and fundraising--for all kinds of nonprofits, from universities to grassroots youth development organizations, performing arts spaces to social service agencies, with the bulk of its clients small to medium-sized nonprofits. As senior partner Lori told me, "in terms of our clients, size doesn't denote importance. We serve organizations with budgets from half a million to 20 million dollars." InsightSolutions strategic plans cost $25,000 to $40,000, and took 4 to 6 months to complete. The firm was well-known in the region, but had no national presence. Firm members prided themselves on their deep understanding of regional philanthropy and public funding.
>
> InsightSolutions' bright but modest offices were located in Philadelphia, Pennsylvania's metropolitan center. As staff told me, the office building was "crappy," but its location

could not be beat for the price. The office interior was clean and fairly recently remodeled, with light carpeting and glass doors. The firm's sleek, modern brand was prominently featured in the reception area. Jim occupied the large corner office and senior staff resided one or two to each glass-doored office, while junior staff shared a larger office. The firm had a "no jeans" policy that was begrudgingly upheld by staff, several of whom told me they needed to get new wardrobes after being hired, to transition from more casual nonprofit workplaces. Claiming lack of time, staff rarely ate lunch together, preferring to eat at their desks or go out independently. The small, shared kitchen was functional but somewhat grungy, fruit flies hovering in the air despite a long-waged battle against them. Jim's special food stash was in a basket atop the fridge. A small bulletin board in the kitchen was covered with liberal slogans related to recent political events. InsightSolutions employees cared a lot about their clients--progressive firm values were posted around the office--and were appalled by the conservative turn in United States national politics in the late 2010s.

Staff worked from standard desktop computers and frequently printed materials to bring to meetings. The phones at each desk were dusty; on one of them, Margaux talked with Ines, located a few offices down the hall, about juggling multiple clients--Margaux had 4 to 6 at any one time. The office bristled with flip chart paper and eager typing; in a small meeting space two staff strategized about a group activity to help a client reimagine its mission and vision, while a group of junior staff in an adjacent office Googled local historic churches and prepared questions for upcoming stakeholder interviews. Sitting in a small, thin-walled room, firm partner Lori explained to me that nonprofits usually approached InsightSolutions when they had a "huge opportunity or an urgent concern." The firm used, she told me, "a facilitative and participatory approach on purpose. We don't claim to be the expert--the first 1/3 of the project is learning about them. […] We bring candor, help our clients to run their nonprofits more like a business, but our clients know the context." As Amanda, a senior consultant, told me, "you have to be comfortable with ambiguity in this work. We have no idea what's going on in the beginning, and you have to be okay with that." Most of InsightSolutions' work was conducted over the phone and via email, supplemented by frequent internal meetings, periodic client meetings in the InsightSolutions office, and offsite client meetings. Consultants rarely conducted site visits to client facilities. All staff were "full utility players"--the firm was too small for staff to specialize in a particular area of work, and partners took on roles like Human Resources in addition to their client work. Firm members worked in teams of 2 to 4, distributed among the firm's several partners, senior staff, and middle and junior-level employees, and struggled to manage their workloads. Sometimes Jim, the firm's primary business development lead, brought in too much work, and the firm's customized processes often ran long or over-budget as consultants strove to give clients what they needed. Sometimes, a staff member told me, the firm "feels like Jim, Inc."--but indeed, Jim specifically avoided naming the firm after himself.

FocusImpact

FocusImpact's offices, on a high floor of a downtown office building in a major East Coast city, were like a maze. The opposite of an open office, the space had narrow hallways with myriad closed offices lining the walls, occupied by midlevel and senior staff. Forty years old, the firm evolved from an original sector-specific focus to become a medium-sized generalist operation--a nearly 50-person team with services spanning nonprofit and philanthropic strategy, evaluation, and corporate social responsibility. Incorporated as a for-profit B-Corporation,[12] the firm had a small nonprofit subsidiary. The firm's nonprofit strategy practice was a team of twelve, made up of primarily white young to middle-aged professionals, balanced between men and women. FocusImpact's founder was an older white man with an MBA and background in business. Firm-wide, women outnumbered men, with a fair number of staff of color and most people in their 20s, 30s, or 40s. FocusImpact's office furniture was modular, warm gray with muted primary colors adorning odd walls, clearly a result of a recent renovation but somewhat awkward and incongruous with the office's closed-off structure. There were two lounges with comfortable chairs and small café tables. Every room featured a large flat-screen monitor; the office also had two larger "Zoom rooms," with long conference tables, double screens mounted to the wall, and Polycom systems in the center. Glass doors were frosted just high enough to prevent a visitor from seeing in. Powerful siloes existed between the firm's functional areas, but within practices firm members collaborated frequently. FocusImpact carried out its work via teams of 3 to 4 firm members, including partners, directors, and mid-level and junior staff. Teams met frequently, both in person and by video via Zoom, when team members were travelling to client sites or working from home. Everyone carried his or her laptop around to meetings, and screen-sharing and Google Docs facilitated collaboration-at-a-distance. FocusImpact consultants spoke at a higher level of abstraction than those at InsightSolutions and followed a more codified process for their work. Strategic plans at FocusImpact cost $60 to $150,000 and followed a prescribed, 6 to 8-month process with several stages, each featuring codified vocabulary and components. Consultants made frequent use of a proprietary assessment tool that was originally created as part of a large client project and then generalized so as to be usable across FocusImpact's work. Nationally known, FocusImpact served both prominent nonprofits across the country and local organizations. Consistently busy, Marion, the nonprofit strategy team's leader, told me that her team's strategic planning projects always went into cost overrun because FocusImpact consultants contributed more time than team leads originally estimated.

ArtsNow

ArtsNow's offices were on the first floor of a sleepy office building in a small town in the Northeastern United States. Specializing in strategy and facilities projects in the arts and culture, ArtsNow recently celebrated its 30th anniversary. Arthur, one of its two founders, was a middle-aged white man with a degree in Fine Arts and experience running arts

[12] The B-Corporation is a for-profit structure in which firms elect to assessment by a third party of the equitability and sustainability of their practices.

organizations. The firm was majority white, with more women than men. The firm's small office featured a corner space for Arthur and offices lining the walls, often empty due to staff's ubiquitous travel to client sites. As Arthur put it, "We don't do most of our work in the office." Indeed, Arthur's office was empty the most--he had elite status on multiple airlines and used a travel agent to coordinate his frequent movements. When he was in the office, Arthur could often be seen (and heard, through the office's paper-thin walls) speaking loudly into a headset, seated behind dual screens. Other ArtsNow consultants were scattered across the United States, working remotely to connect to the larger team of 15, several of whom had MBAs and all of whom brought a background in the arts. During meetings, staff members jumped between a handful of tools to connect remotely--they preferred Zoom but always had a backup handy, should the connection go down.

A small library next to a high-top communal table at the center of the office boasted a combination of books on management and the arts, folders on philanthropy, and organizational documents. Team members referred to themselves as consultants and had similar concerns to FocusImpact and InsightSolutions related to their business model and cost overrun, struggling with boom and bust periods and delegation among hectic schedules and heavy workloads. A bottleneck frequently occurred as staff waited for Arthur's approval of plans and deliverables, which led to a "72-hour rule"--staff had to give Arthur 72 hours to respond to requests, though, one admitted, he rarely met this goal. Incorporated as a for-profit firm, in the recent past, one of the firm's partners took on the supplementary role of Managing Director. ArtsNow subscribed to and made heavy use of sophisticated market research datasets in its planning and buildings-related work, which was split between two elements--quantitative analysis in Excel to produce pro-forma budgets and conduct market sizing and penetration analyses, and in-depth facilitation, often oriented around group games, cards, and game boards. Staff collaborated on about 6 projects at a time in 2 to 3-person teams, taking different roles in distinct projects. Staff spent large stretches of office time on silent, computer-oriented work that one member described as "intellectual, and tiring after 9 hours."

How Consulting Works

Firm Structure and Composition

According to Hannan and Freeman's classic 1977 article on the population ecology approach to organizational analysis, organizational forms are blueprints by which organizations transform inputs into outputs via formal structure, patterns of activity, and normative order. The dominant such form in consulting to nonprofits resembles the archetype[13] of corporate

[13] An organizational form containing a set of culturally-defined tools or repertoires of collective action.

management consulting (Clemens 1996). Firms are led by founders and sets of partners who share net profits, supported in a pyramidal fashion by top managers, middle-managers, and lower-level project and support staff, with smaller firms assuming simplified versions of this model. The structural similarity among corporate consulting firms and those that serve nonprofits, as well as among firms of smaller and larger size, may derive from historical context--the first management consulting firms arrived to the nonprofit sector via the corporate world (McKenna 2006). Nonprofit and corporate firms also may experience common "field-level pressures" (Scott 2013:229) related to economies of scale, client management, and the production of knowledge in a professional service context (Barley and Kunda 2004; Hargadon and Betchky 2005).

Work is organized into projects that take the form of client-scope dyads (such as a strategic plan for The Red Cross) and are accomplished by teams of firm members that vary in size from 2 to 8 (or so) members. Senior firm members are responsible for business development--cultivating clients and securing contracts--but the vast majority of the actual project work is conducted by middle and lower-level staff. In this model, referred to in management consulting as a "leverage" model (Morris, Gardner, and Anand 2012), senior staff appear in the beginnings and ends of projects to lend legitimacy to results and deliverables and build rapport with the leaders of client organizations, while lower-level staff carry out the content of project work according to more- or less-standardized templates. However, in smaller firms, this model is less feasible--senior staff contribute more heavily to projects when the availability of lower-level staff is limited.

In terms of race and gender, in many consulting firms that serve nonprofits, older white men serve as firm founders and presidents, with middle-aged to young professional white women

prevalent as firm partners, directors, and lower-level staff. Sole proprietor consultants are both men and women, usually middle-aged to senior. People of color are often represented on consulting teams, but make up a minority within mostly-white firms. Though white-led firms make up the majority of the field of consulting to nonprofits, there also exist a number of firms primarily led and staffed by people of color. These firms often explicitly focus on issues of diversity, equity, and inclusion in nonprofits.

Lower-level consulting staff have bachelor's degrees in a wide variety of fields. Middle and more senior staff and leadership have graduate degrees in fields related to nonprofit work (e.g. Social Work, Nonprofit Management, International Relations) or business (MBAs). Additionally, many senior staff at consulting firms boast long histories leading nonprofit organizations prior to their transition to consulting. Politically, most consultants to nonprofits hold progressive political views, though few publicly express such preferences.

Legitimacy and Field Membership

Like corporate management consultants, consultants to nonprofits lack typical markers of professionalism, such as a uniform credentialing system and a standard stock of knowledge (Abbott 1988). To build their legitimacy in this context, some consultants belong to professional associations, including national organizations such as the Alliance for Nonprofit Management and National Network of Consultants to Grantmakers, and local associations, such as the Association of Consultants to Nonprofits (Serving the Chicago metropolitan area), Nonprofit Consultant Network (Serving Philadelphia) and Association of Nonprofit Specialists (Serving New York City). These professional associations provide opportunities for professional development, such as webinars, conferences, and workshops, and contain directories of

consultants serving particular regions. Other consultants seek certification via standard management consulting associations--ArtsNow's founder Arthur, for example, was a certified management consultant with the Institute of Management Consultants USA.

In the absence of standard markers of professionalism, consultants in the nonprofit sector, like corporate management consultants (Faust 2012) also rely heavily on their networks and reputations among current and past clients for legitimacy, as well as the prestigious backgrounds of firm leaders and links to powerful funders or organizations (Heinz and Laumann 1982). In the survey of foundations conducted as part of this project, respondents reported making heavy use of referrals from personal connections, staff, and peer foundations to identify the consultants with whom they worked (Faust 2012).[14] In this way consultants' work is reminiscent of the networked form of organizing articulated by Powell (1990), in that *relationships* between clients and consultants are the defining characteristics of consulting firms and indeed requirements for their existence, and clients and consultants mutually share the potential benefits and consequences of their work together (Powell 1990).

Consultants to nonprofits' use of the corporate consulting organizational archetype and lack of standard markers of professionalism raise the question of whether they should be considered a field of their own in addition to or instead of a constituent element of another field--the field of management consulting, or field(s) of nonprofit activity. Various definitions of organizational fields exist within which to consider this question: According to DiMaggio and Powell (1983), fields are "those organizations that constitute a recognized area of institutional life: key suppliers, resource and product consumers, regulatory agencies, and other organizations that produce similar services and products." Emirbayer and Johnson (2008), describing Pierre

[14] Survey results are biased due to low response rates (see the Methods section for a description of survey methodology and limitations), so these results should be taken as suggestive rather than definitive.

Bourdieu's contribution to organizational analysis, defined a field as a set of actors occupying positions arranged in a temporary configuration of power relations. Fligstein and McAdam (2015) and Scott (1995) defined fields in terms of interaction, in which field members "are attuned to and interact with one another on the basis of shared […] understandings about the field's purpose, constitutive relationships, and rules governing action (Fligstein and McAdam 2015:9).

Because consultants to nonprofits interact more with nonprofits than with other actors, partake in and absorb the cultural meanings that govern nonprofit activity due to relevant educational backgrounds and career histories, and are governed by the same power structure--institutional philanthropy--that governs nonprofits, consultants to nonprofits can be considered members of the field(s) of nonprofit activity. Alternately, consultants to nonprofits can be considered a field of their own, as they show evidence of emergent field structuration. The existence of professional associations specifically for consultants to nonprofits suggests the development of "mutual awareness among participants […] that they are engaged in a common enterprise" (DiMaggio and Powell 1983:148). Additionally, in Chapter 7 I describe the "interorganizational structures of domination and patterns of coalition" that characterize the consulting field (DiMaggio and Powell 1983:148). Consultants' self-awareness as existing within a field of common activity and the emergence of inter-consulting firm hierarchies suggest that in addition to existing as part of the nonprofit sector, consulting to nonprofits can be considered a nascent field of its own.

Paying for the Work

Consulting firms are hired by nonprofit organizations and philanthropic foundations to carry out projects of varying types and durations. Sometimes consulting firms are hired by foundations to work directly on internal foundation matters, and sometimes funders hire consultants to work with their grantees. Consultants are also hired directly by nonprofit organizations--though nonprofits sometimes pay for consulting services out of their operating reserves, consulting work is often funded by a foundation grant the client nonprofit has procured. Additionally, many funders require grantees to have strategic plans in order to be eligible for grants. In these cases, funders sometimes suggest particular consultants to current or prospective grantees. In the survey of foundations conducted as part of this project, respondents indicated that foundations retained and recommended a wide variety of consulting firms and types, perhaps simultaneously, for these different purposes. Across internal and grantee use, foundations recommended a mix of large firms, small firms, and sole proprietors, including both generalists and subject-specific experts.

The work of consulting to nonprofits is therefore located at the nexus of the nonprofit and philanthropic sectors. In contrast to corporate management consulting, there is often a third party in consultant-client relationships in the nonprofit sector--funders often influence who works with whom, and consultant-produced strategy and evaluation work is often orientated toward a funder audience (De Vita and Fleming 2001:71).[15] This triadic relationship is represented in the following diagram:

[15] I discuss this relationship at length in Chapter 7.

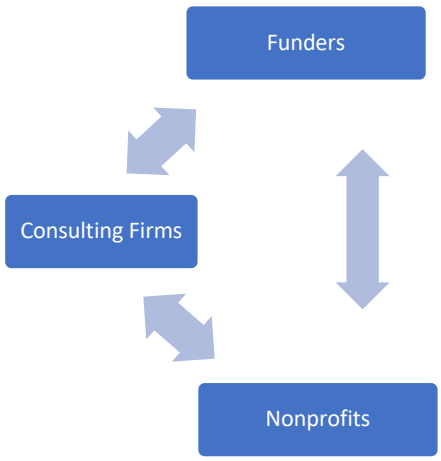

Illustration 1: The Triadic Relationship Between Nonprofits, Consultants, and Funders

In this context, funders can in some ways be considered the system's anchor tenants--central actors that broker trust relationships within the field (Powell 1990). However, both consultants and funders play important bridging roles, connecting organizations--consulting firms, funders, and nonprofits--to each other, and to the ideas and resources each of these parties offer (Stovel and Shaw 2012).

Intermediary and Capacity Building Organizations in the Nonprofit Sector

Thinking of nonprofit consultants as working at the nexus of the nonprofit and philanthropic sectors also highlights their membership in a category of intermediary or "management support" organizations in the nonprofit sector (Brown and Kalegaonkar 2002). According to Shea (2011), "intermediaries seek to enhance the capacities of the organizations […] and the communities of which they are a part" (58). In particular, these organizations work to strengthen organizational capacity, mobilize resources, provide information, build inter-organizational alliances, and bridge the nonprofit and other sectors (Brown and Kalegaonkar 2002). The small literature on this role in the nonprofit sector mostly focuses on funding

intermediaries and highlights the need for intermediary organizations to respond to conflicting pressures--upward to funders and downward to nonprofit organizations. In an investigation of the use of performance measurement by funding intermediaries, Benjamin (2014) found that intermediary organizations implement their work in distinct ways according to their particular roles and encoded values, suggesting that organizational characteristics influence the way intermediaries carry out their work.

Nonprofit consulting firms are also "capacity building" organizations in the nonprofit sector. Indeed, many consultants refer to themselves and their organizations as "capacity-builders."[16] According to a prominent consulting firm, capacity comprises "the skills and ability to make and execute decisions in a manner that achieves effective and efficient results. Capacity building is the process of developing those skills and abilities" (Raynor et al. 2014). De Vita and Fleming (2001) similarly defined "capacity building" as "strengthening nonprofits so that they can better achieve their mission" (38). According to De Vita and Fleming, capacity building work in the nonprofit sector has grown in prevalence and visibility due to the rise of venture philanthropy, the increasing commitment of philanthropic funders to evaluation and desire to leverage philanthropic dollars for increased impact, and to changes in the nonprofit sector that have led to a need for stronger nonprofits--including government funding cuts, the privatization of services previously dominated by nonprofits, and increased demand (33). A 2007 study by Millesen and Bies found that consultants are one of the most prevalent sources of external capacity building support for nonprofits (20).

[16] I discuss this nomenclature further in Chapter 6.

Dimensions of Similarity and Difference Among Consultants to Nonprofits

As the vignettes that began this chapter suggest, consulting firms like InsightSolutions, FocusImpact, and ArtsNow aligned and differed on several dimensions. This section will review several key axes of variation among firms, including organizational form, services, clients, content of the work, and firm size. As I will describe, firm size, combined with content focus, is a particularly important dimension of difference in the field of consulting to nonprofits. In my research, firms of different size and focus had meaningfully different approaches and claimed different types of knowledge, delineating salient and distinct models of practice in the field.

Organizational Form

Some consulting firms that serve nonprofit organizations are incorporated as for-profit organizations. In my research, this organizational form was chosen by some firms out of convenience, and by others to avoid competition with their clients for philanthropic dollars. Correspondingly, other consulting firms are structured as nonprofits or B-Corporations, to demonstrate solidarity with mission-driven work. Each choice of organizational form represents a firm's attempt to gain legitimacy via recourse to an extant structure the firm deems appropriate to its relationships with its clients (Zelizer 2010).

Services

Hwang and Powell (2009) identified three common services consulting firms provide to nonprofit organizations: strategic plans, independent financial audits, and quantitative program assessments, all of which "represent attempts to measure and formalize nonprofits' activities" (272). They explained,

> Strategic plans are formal documents that articulate organizational goals and the means by which to achieve them over a specified period of time and propose to promote effective management by prioritizing goals under resource constraints. Nonprofits frequently use strategic planning as opportunities to revisit and redefine missions and to explore their strategies for revenue generation, fundraising, and public relations. While strategic plans are forward-looking statements, independent financial audits entail examining the completeness and accuracy of past financial accounts by a disinterested third party. Audits are intended to enhance accountability in the eyes of external stakeholders and the general public. Quantitative program evaluations attempt to measure the effectiveness of specific programs and allow organizations and their audiences to benchmark different organizations on common metrics. (272)

Firms discussed in this dissertation offered multiple services, ranging from the strategic plans and quantitative program evaluations Hwang and Powell (2009) discussed to a wide range of other services, including organizational assessment and board development, capacity building, program design, fundraising, marketing, and communications, among others. I describe each of these services briefly below. However, this list of services is incomplete; firms offered a wide variety of services depending on their capacities and perspectives, often using varying nomenclature to refer to similar offerings. The firms discussed in this dissertation did not, for the most part, offer financial audits, as this service is typically performed by accounting firms.

Strategic planning in the nonprofit sector originated in United States government budgeting paradigms under the Kennedy and Johnson administrations, via these administrations' interest in the potential for rational government to contribute to social reform (Krause 2014:79). Specifically, program budgeting, implemented in the 1960s and 1970s in the United States, entailed closely linking specific activities and associated costs, to more broadly link planning with results (Krause 2014:81). Under these reforms, led by Robert McNamara, budgets were constructed "according to the goal and measurable outcome the resources were designated for" (Krause 2014:82). As Krause recounted, the program budgeting approach "was just one chapter in the long history of administrative reform [in the United States] […] results-based management

has since taken various forms and has been implemented with uneven results" (83). Following this period, Nixon implemented "management by objective," inspired by the ideas of Peter Drucker, Carter introduced zero-based budgeting, and New Public Management" rose in the 1980s and 1990s (83). These ideas in government were the precursor for the spread of such ideas to the nonprofit sector, due to many nonprofits' close links to government (Barman 2016).

The majority of the strategic planning approaches used in the nonprofit and public sectors today are linked to a model developed by the Harvard Business School, which centers on analysis of organizational strengths, weaknesses, opportunities and threats (a SWOT analysis) as the primary data-gathering step in strategic planning (Panagiotou 2003). Henry Mintzberg (1994) described the "basic planning model" as rooted in a belief that there should be "congruence between external and organizational factors." In this approach:

> Strategy is created at the intersection of an external appraisal of the threats and opportunities facing an organization in its environment, considered in terms of key factors for success, and an internal appraisal of the strengths and weaknesses of the organization itself, distilled into a set of distinctive competencies. Outside opportunities are exploited by inside strengths, while threats are avoided and weaknesses circumvented. Taken into consideration, both in the creation of the strategies and their subsequent evaluation to choose the best, are the values of leadership as well as the ethics of the society and other aspects of so-called social responsibility. And once a strategy has been chosen, it is implemented. (36-37)

In the nonprofit sector, strategic planning largely aligns with Mintzberg's definition, involving an external assessment of threats and opportunities, an internal assessment of strengths and weaknesses, and a matching process to align strengths with opportunities and avoid weaknesses and threats, resulting in strategy. Take InsightSolutions' strategic planning process, encapsulated by the diagram the firm used to explain strategic planning to clients.

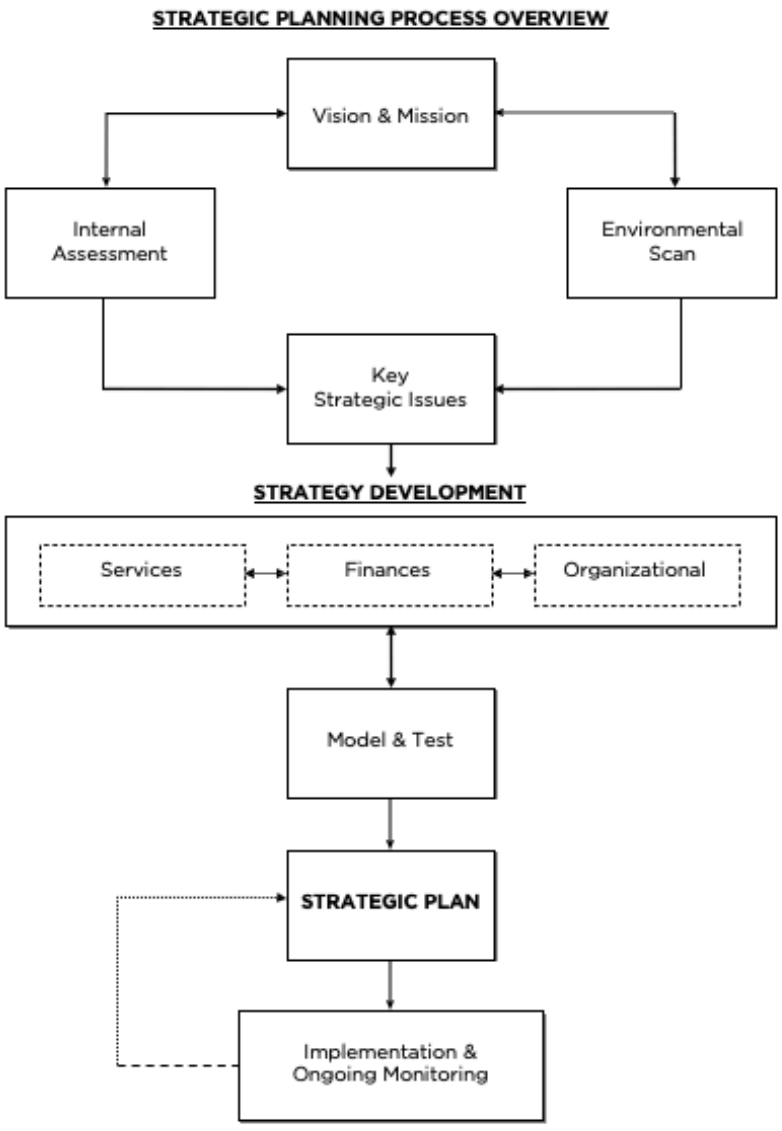

Illustration 2: The Strategic Planning Process

InsightSolutions conducted an internal assessment and environmental scan of the client organization, which together approximated a SWOT analysis, and used this research to iteratively create a mission and vision and identify a set of key strategic issues for the client in the course of research. These key issues fed into the development of strategies around services,

business model and organizational structure, making up the backbone of the client's strategic plan, which was modeled and tested by consultants before being finalized.[17]

The history of program evaluation in the nonprofit sector is similar and interrelated with the rise of strategic planning. Program evaluation often entails quantitative measurement to define positive changes resulting from the effects of a nonprofit's programs on clients. Similar to strategic planning, outcome evaluation in the nonprofit sector arose via the ideas of New Public Management in government, which held that government should resemble business to increase efficiency (Barman 2016). Under this paradigm, federal agencies were required to employ strategic plans linked to measurable goals. Relatedly and simultaneously, the United Way began to require member chapters to implement outcome measurement, to show accountability to funders. Through the use of similar consultants and in their roles as resource intermediaries, the government and the United Way spread outcome measurement across the nonprofit sector (Barman 2016).

From these roots, the field of nonprofit program evaluation grew and diversified. Consultants' evaluation services span a variety of methodologies and perspectives. Some consultants use ethnography or randomized control trial designs to measure the impact of programs operating at scale; others conduct formative and "developmental" evaluations to improve in-development and pilot programs. Most evaluation-related services offered by consultants represent a mix of methods and approaches, such as audience surveys, focus groups, and program evaluations that incorporate pre-and post- or retrospective survey and interview components, as well as secondary analysis of existing data.

[17] InsightSolutions often modified and customized this process, a practice I discuss in Chapter 5.

Organizational assessment and board development services are closely related to strategic planning, in that these services involve assessing a nonprofit organization's operating and board structures and processes and making recommendations for improvement. This work can include interviews with organizational leaders, board members and key staff, written assessments of board skills and capacities, and reviews of organizational plans, documents, finances, and operating procedures. Resulting plans often contain recommendations to change or add additional structures and processes to organizations--such as board committees and organizational charts--to correspond with "best practices" in the nonprofit sector and in board governance.

Capacity building services can entail a variety of things. In practice, capacity building services provided by consultants overlap significantly with organizational development and may include consultant-led efforts to audit and improve organizations' fundraising infrastructure and processes, volunteer management systems, leader effectiveness (which overlaps with a related service, executive coaching), and program monitoring and evaluation efforts, among many other topics. De Vita and Fleming (2001) suggested that the most prevalent capacity building services are assessment services, management consultations, training programs, technical assistance, and direct financial support. Relatedly, program design involves the consultant-supported development of a new or revised program for a client, such as scaling an existing program to additional sites. In such cases the consultant offers expertise on either the content of the program (e.g. youth development programs), or the structure of the program or initiative (e.g. program franchising).

Executive search services entail consultant-facilitated recruitment of executive-level staff positions, in which the consultant writes and distributes job description information, recruits and

screens candidates, and facilitates interviews and offers. Fundraising, marketing and communications services offered by consultants take one of two forms--consultants either work with organizations to develop *plans* for such functions, such as a plan for a capital campaign or new marketing plan, or serve as *outsourced capacity* for these services. In the latter case, the consultant is hired to *carry out* work for the client that is typically done in-house, such as writing grant applications or soliciting capital campaign donations. Often, these services are paired--a firm creates the plan for a capital campaign and then is retained to implement the campaign.

In my investigation of the field of consulting to nonprofits, strategic planning, organizational and board development, capacity building, and fundraising were commonly co-present within single firms, as they were at InsightSolutions. Program evaluation and strategic planning were less commonly co-present in a single firm; when they were, for example at FocusImpact, the two services were often housed in separate divisions.

Clients

In addition to their services, consultants also vary in terms of the clients they serve. Most consulting firms included in this dissertation claimed to serve *both* nonprofit organizations *and* philanthropy, with many additionally serving public agencies. However, firms tended to *focus* on one group or the other. For example, InsightSolutions focused primarily on serving 501(c)3 nonprofit organizations, but also served the occasional philanthropic foundation and public agency. Some firms served all three groups but housed their practices in separate divisions. For some firms, a focus on operating nonprofits versus philanthropic foundations was a principled distinction--as one consultant told me, she perceived it to be a conflict of interest to serve both foundations *and* nonprofits, given that by serving both groups her firm could privilege the latter

for funding by the former.[18] For others, a focus on one group or the other emerged gradually and out of convenience, as firm reputation and networks developed among particular groups of organizations. Bruton and Willliamson (2005) argued that intermediaries tend to focus on providing services either to funders or nonprofits because it is difficult to signal legitimacy simultaneously to these two audiences. Additionally, many firms struggled to work with small nonprofits given that these organizations' limited budgets for consulting often made it difficult for consultants to complete their work without exceeding agreed-upon fees,[19] and some consultants sought creative solutions (for example, cohort-based models in which consultants worked with small organizations in groups) to serve organizations with constrained budgets.

Content

Firms also differ in the nonprofit subfields on which they focus. Many organizations I encountered in my research, such as InsightSolutions and FocusImpact, were generalists, meaning they did not specialize in a particular area of nonprofit activity and worked broadly across subfield such as the arts, environmentalism, human and social services, and education. Others, such as ArtsNow, focused on one or more of these areas. ArtsNow, as evident in its name, worked specifically with arts and cultural organizations, a focus linked to the arts background of firm founder Arthur. Similarly, InsightSolutions' and FocusImpact's generalist foci aligned with the generalist backgrounds of their founders--neither Jim nor FocusImpact's founder brought specific content expertise to his firm. Hannan and Freeman (1977) outlined the potential relationships between such generalists and specialists in organizational fields, suggesting a tradeoff between exploiting the environment and the clarity of specialization.

[18] Other firms, however, saw this as part of their value proposition.
[19] I discuss this at length in Chapter 6.

However, in the case of consultants to nonprofits, the choice to generalize or specialize appeared more personal, linked to founders' identities and backgrounds.

Beyond explicit nonprofit subfields, some firms also focus on a particular approach to consulting work, again tied to the backgrounds of their founders and staff. Some firms explicitly use "Design Thinking" approaches to planning, which focus on rapid testing of ideas and significant stakeholder involvement. Some explicitly apply strategies from the business world to nonprofit clients, such as "return on investment" and other quantitative analyses. Some function as loose collectives of former nonprofit executives, intending a "senior advisory" bent to their work rather than consulting's typical pyramidal structure, in which lower-level staff carry out the majority of the work advised by partners. Some hire primarily Ph.D. researchers to underscore the seriousness of their research and analysis. Most consulting firms, however, mix these various characteristics in their work.

Size

Firm size is another major source of variation in consulting to nonprofits, and, when combined with firms' content focus, a key source of deeper variation between providers in the field. Differently-sized and -focused firms that I encountered in my research had meaningfully different approaches and leveraged different types of data and knowledge in their work, delineating salient models of practice that defined the field.

A nonprofit or foundation selecting a consultant for strategic planning could choose a sole proprietor (an individual consultant), a small firm that specializes (or does not) in its area of work, or a large, prominent firm, that might work across the for-profit and nonprofit sectors or focus solely on nonprofits. This variation exists both on a national scale and within local areas.

As an InsightSolutions staff member explained, many cities contain three types of consulting firms--large firms that require frequent travel and the processes of which resemble corporate management consulting, independent consultants, and firms like InsightSolutions "in the middle." Gina, a senior member of Analytico, a multinational firm that serves both nonprofits and corporations, echoed this distinction while describing her view of the field: "There are the [corporate firms]. Then more mission-driven [large] firms. Then small firms, then the whole range of individual consultants who do the work."

As these consultants suggested, size, when combined with content focus, is a critical distinguishing factor among consulting firms to nonprofits. Consulting firms range in size from multinational companies with thousands of employees to hundred-person nonprofit-focused firms to sole proprietors. Sole proprietors and tiny firms with 1-3 staff are most numerous in the field--some sole proprietors describe themselves as generalist facilitators, and others as highly-specialized advisors. The latter category of sole proprietors encompasses alumni of large consulting firms, major philanthropic foundations, and prominent organizations. The second largest segment in the field is small "boutique" firms with roughly 10-25 staff, a category that includes both generalists like InsightSolutions and specialists like ArtsNow. FocusImpact was slightly larger, with approximately 50 employees. The field's most visible providers include 5 to 10 large firms, often originating in or affiliated with for-profit companies. These larger firms, a category that includes both large nonprofit specialists and corporate firms that serve both nonprofits and corporations, are very different from smaller firms like InsightSolutions and FocusImpact. I spent one day in the offices of WorldAdvisors,[1] a large firm that serves exclusively nonprofits and is itself a nonprofit, and the differences between WorldAdvisors' work and that of smaller firms were striking:

> WorldAdvisors' expansive office space was on the second floor of a fancy office building, downtown in a major city. It had an open floor plan sprinkled with individual desks--a partner at WorldAdvisors told me when I arrived that staff could sit anywhere, which created a very clean atmosphere because staff did not leave personal items at their desks. The office was far from full--90% of the desks were empty, with many of the firm's 100-plus staff traveling, either to the firm's other offices or to client sites. There was an open kitchen in the middle of the office. The furniture was primary colors, with marble tabletops--cheerful, flexible and modern-sleek, with glass-walled conference rooms. There were a variety of seating options--high top tables with air plant-driftwood displays, normal-height tables, sections of desks, couches and comfortable chairs. WorldAdvisors' conference rooms had space-age conferencing systems and no furniture showed any sign of wear. Though WorldAdvisors was a nonprofit, it felt very well-resourced. The office was quiet--it was well-soundproofed, compared to InsightSolutions and ArtsNow's paper-thin walls. WorldAdvisors consultants did not use paper much in their work, compared to InsightSolutions' ubiquitous manila folders, and WorldAdvisors' teams were significantly bigger than those at smaller firms. Overall, WorldAdvisors consultants were more diverse than smaller firms' mostly-white staff. Staff members were smooth and polished--firm members were extremely on-task during meetings, and spoke crisply and to the point, with clear messages to convey. In meetings, staff talked about calling major national foundations for advice and using raw Guidestar data, whereas InsightSolutions had to sign up for free Guidestar accounts and ArtsNow could not get a call back from the National Endowment for the Arts. WorldAdvisors consultants theorized in meetings about the nonprofit sector at a high level, using prior WorldAdvisors work to create frameworks to share with the field.

WorldAdvisors' offices differed from InsightSolutions, ArtsNow, and FocusImpact in scale (much larger), and atmosphere (much wealthier and more elite, with a polished, state-of-the-art office, compared to smaller firms' more modest settings). Conversations at WorldAdvisors also reflected a higher level of generality and access to powerful actors in the field compared to smaller firms. Indeed, the prices of these firms' services also differed sharply from one another--while strategic plans from InsightSolutions cost $25,000 to $40,000, a strategic plan from WorldAdvisors might set an organization back $300,000 (though firms that serve both nonprofits and corporations sometimes offer *pro bono* services to well-connected nonprofits).

What Size Belies: Approach and Access

As the description of WorldAdvisors suggests, size distinctions were also indicative of more substantive differences between firms like WorldAdvisors and InsightSolutions. These differences were more subtle than the structural distinctions--in terms of services, clients served, business model--outlined earlier in this chapter, but had similarly significant impacts on consultants' work. Specifically, in my research, larger and smaller firms brought different approaches to their work, mustered different kinds of data, accessed different kinds of people, and used different types of knowledge, with important nuances existing between the two extremes, and between firms of generalist and specialist focus.[20]

Corporate Consulting Firms: A sole proprietor consultant who had worked extensively with large firms shared observations about how corporate management consulting firms, the largest firms in the field, worked with nonprofits and foundations. In his experience, he told me, such firms "were trying to apply the corporate model directly to nonprofits." These firms collected background materials, conducted interviews, and used this information to generate a definition of the client's problem. Based on this, the consultants "build a PowerPoint deck, put in lots and lots of metrics, and do an Analytico case," just as they would for any corporate client. Gina from Analytico corroborated this account--as she told me, Analytico used the same process for corporations and nonprofits--"it's the same no matter who the client is."[21]

Large Nonprofit Specialists: The sole proprietor consultant drew a distinction between corporate consulting firms that worked both for nonprofits and corporations and nonprofit

[20] I analyze the implications of these distinctions in terms of inter-firm relationships in Chapter 7.
[21] Note that my data about large corporate consulting firms are limited to interviews with firm members and secondary information from independent consultants who had worked with large firms; these accounts would be richer if I had been able to conduct fieldwork in a large firm, but my attempts to secure such access were unsuccessful.

specialist firms like WorldAdvisors, that, offshoots of corporate management consulting firms, still applied a "management consulting" approach to the work, but tailored their processes to the particularities of the nonprofit sector. These firms were smaller than corporate management consulting firms but still large for nonprofit consulting.

In an interview, Nancy, a partner at WorldAdvisors, explained that her firm used a "Solution First" approach derived from its corporate parent firm, in which consultants used "hypothesis-driven thinking" to answer difficult questions in short periods of time. For an advocacy organization client, for example, Nancy explained that her team began by generating a list of the "possible roles for an advocacy organization, based on conversations to date and WorldAdvisors' past work." To do this, the consulting team "took a couple hours and read everything we had ever done in [this area of] advocacy." Based on this review, the team "came up with a hypothesis--what we think the highest-value roles are [for advocacy organizations]." The team then checked this hypothesis with the client and proceeded to conduct interviews to assess whether organizational stakeholders agreed with WorldAdvisors' hypothesis and its component assumptions. This process, Nancy explained, allowed for "early alignment with our clients on what their experience will tell them matters [… while also] focus[ing] our research." As part of its hypothesis-driven approach, WorldAdvisors used quantitative models to analyze clients' data. WorldAdvisors had, Nancy explained, "deep analytic capacity […] "for one analysis we had to go use a supercomputer at [our corporate parent firm] to do the number crunching." Edam, a former WorldAdvisors consultant, elaborated, claiming that he did a lot of "quantitative analysis in Excel" while working at WorldAdvisors, including financial modeling and scenario analysis regarding "how much [a program] costs per unit of impact […] to quantify the decisions we were making."

Despite WorldAdvisors' use of these corporate management consulting strategies (quantitative modeling and a "solution-first" approach), WorldAdvisors considered itself distinct from corporate consulting. Nancy elaborated on the difference between WorldAdvisors' work and corporate firms, where she began her career. To accommodate the particularities of the nonprofit sector, she explained, WorldAdvisors' mixed hypotheses and quantitative models with facilitation. Corporate consulting firms, she said, relied less on client's perspectives and more on proprietary analytics to generate solutions--such firms "do the analytics, and then come back and say 'here's the answer we see based on the analysis, here's what we think that means for you.'"[22] In contrast, she explained, WorldAdvisors collaborated with its clients via facilitated meetings in which the firm incorporated clients' insights and experiences into the firm's conclusions.[23] According to Nancy, the simultaneous focus on analytics and facilitation distinguished WorldAdvisors from corporate consulting.

Large nonprofit specialist firms like WorldAdvisors therefore used corporate management consulting processes in their work with nonprofits,[24] but differed from corporate firms in the former's use of *facilitated meetings* to incorporate client perspectives into recommendations. Firms like WorldAdvisors also had access to *national experts*, and though they were generalists, large nonprofit-focused firms' size allowed their staff to develop *content-specific expertise*. For example, WorldAdvisors project work occurred in teams with thematic focus areas, and Nancy considered herself an expert in her area.

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[22] This does not mean that corporate consultants did not collaborate with their clients--they did, especially with the client representatives to whom they reported. However, this collaboration was narrower and more focused on ensuring that consultants' work or recommendations did not antagonize the client.
[23] I analyze these meetings in Chapter 5.
[24] Again, the fact that I was unable to conduct fieldwork in large firms (beyond the single day I spent in WorldAdvisors' offices) limits the confidence with which I come to these conclusions. My analysis of large firms' work, in this dissertation, is limited to extensive interviews with staff members of large firms (including both current and former staff), and some secondary accounts.

Boutique Generalist Firms: Boutique firms like InsightSolutions were much smaller than firms like WorldAdvisors (InsightSolutions had twelve staff at the time of my fieldwork, while WorldAdvisors had more than 100). Boutique generalist firms correspondingly did not have access to the kinds of national elites, quantitative data and analytical resources described by WorldAdvisors consultants. Consultants in boutique firms correspondingly placed *more* emphasis on the facilitation component of consulting work than did large firms. Contrasting with large firms' quantitative models and national reach, small generalist firms often focused on *firm and client networks* at a *local or regional* scale.[25] They gathered interview and internet research-based data on stakeholder perceptions of client nonprofits. They also collected information about organizations they considered to be similar to their clients, including perspectives derived from consultant and client networks.[26] Consultants used these data to produce assessments of clients' situations and draft options for clients' futures. They then facilitated meetings with clients to discuss the findings and options, which were refined, changed, and prioritized through further discussion. Correspondingly, these consultants insisted that they held *process*, rather than content, expertise[27]--as one consultant put it, "[we] depend on our clients to be content experts." As Jim told me during an interview, "as a consultant, you never want to get ahead of your clients. The consultant can't be the one driving it. We cannot be the one with the ideas and the energy and the interests." Furthermore, rather than analyzing client data via proprietary models, InsightSolutions often adapted and used *frameworks from other sources*, including prominent

[25] Few consultants seemed to concentrate on particular places *by choice*, but many worked primarily in their local metropolitan area by convenience.
[26] I discuss this process extensively in Chapter 4.
[27] Management scholar Edgar Schein wrote about a similar approach primarily for a practitioner audience—see, for example, Schein (1969).

consulting firms and management scholars, a dynamic also noted in studies of corporate consulting (Strang, David, and Akhlaghpour 2014; Kipping and Wright 2012).

Boutique Subfield Specialist Firms: Boutique specialist firms similarly emphasized the customized and facilitation-heavy nature of their work. As Isabel, a partner at ArtsNow, recounted to me over a drink at a hotel bar, her son-in-law "used to work for [a corporate firm] and would tell me that ArtsNow is hopelessly inefficient. He would ask me, don't you just have a model you can plug things into?" She explained that what made ArtsNow inefficient was "the fact that we don't have one model--the human thing, the interpersonal work. That's what makes us less money than we could be making." However, specialists like ArtsNow differed from boutique generalists like InsightSolutions in the data they used for their work, and in the knowledge to which they laid claim. ArtsNow subscribed to marketing datasets and conducted financial modeling in addition to relying heavily on interviews, internet research, and facilitated meetings in its work. Claiming significant sector-specific expertise, the firm worked nationally and internationally with prominent arts organizations. However, rather than looking *across* fields for relevant information, as did generalist firms like InsightSolutions, ArtsNow focused on arts-specific information. Firm leaders developed their own frameworks to analyze client work, sometimes doing so by applying concepts that originated in academia. Firm members infused their facilitation-heavy approach to projects with sector-specific data and insights derived from deep content knowledge.

To summarize, representatives of both smaller and larger firms named some of the same general methods as core to their processes--secondary research and interviews with experts, internal stakeholders, and clients. They all also employed similar general project structures, beginning with a research phase and producing a set of options for clients, aiming to identify a

clear focus, mission, and vision for client organizations about which stakeholders were excited. However, differently-sized consulting firms also tended to employ meaningfully different approaches to their work, with additional variation stemming from content focus:[28]

> *Hypothesis vs. Process:* Large firms tended to use a "hypothesis-driven approach," in which consulting teams generated hypotheses about solutions to client problems and then proceeded to test these hypotheses through research and quantitative modeling. Conversely, smaller firms--both generalists and specialists--took more process-oriented approaches, in which they inductively generated solutions to problems by facilitating discussions between groups of client representatives.[29]
>
> *Data and Analysis:* Consultants in large firms mentioned conducting extensive quantitative modeling in their work. They also developed and deployed their own conceptual frameworks across nonprofit clients. Smaller generalist firms tended to gather interview and internet research-based data on stakeholder perceptions of their client, and often adapted frameworks from other sources, including other consulting firms. Small subfield specialists mixed both approaches.
>
> *National Experts vs. Local Networks:* Rather than looking to local peer organizations, large firms had access to national funders and experts, and might examine, as a consultant from a large firm put it, "adjacencies--what is going on in the public or private sector, or in research in a related field." In contrast, small firms focused on firm and client networks--at a local or regional scale for generalists, and within a particular subfield for specialists.
>
> *Content vs. Process Expertise:* Large corporate consulting firms applied consistent approaches across clients, while large nonprofit specialist firms and small subfield specialists leveraged content-specific expertise as well as process knowledge. Small generalist firms claimed process expertise, deferring to their clients for content knowledge.

Looking across these factors, Gina gave her perspective on how size-based distinctions added up to fundamental differences in approach between larger and smaller firms, focusing primarily on generalists: "It's a difference in opinion of what strategy is." She claimed that small generalist firms assumed the "client knows best," while larger firms claimed more authoritative expertise

[28] Some of these dimensions have been outlined by scholars of management consulting (e.g. Alvesson and Johansson 2001), and by nonprofit consultants themselves, writing for other professionals (e.g. Cardona 2015).

[29] Note that the processes utilized by firms that describe themselves as specializing in "design thinking" are distinct--I did not focus on these firms in this dissertation.

rooted in their data and analytic capacities. In her view, large and small firms' different conclusions derived from different approaches to expertise.[30]

This comparison is, of course, oversimplified--as this section has shown, there was significant variation between and within the "large" and "small" firm categories. For example, Jim, the founder of small generalist firm InsightSolutions, distinguished his firm's work from "facilitators of discussions […that do not examine] the substance" of the client's problem, claiming more analytical and content expertise than he attributed to "facilitator" consultants. Additionally, FocusImpact was best categorized as a medium-sized firm--larger than InsightSolutions but smaller than WorldAdvisors, it used a proprietary assessment tool in its work and operated nationally, deploying a strategic planning process more standardized than InsightSolutions',' with frequent facilitated meetings. WorldAdvisors was a large firm that deployed a traditional management-consulting approach mixed with facilitation to align with the particularities of the nonprofit sector. And ArtsNow, a small subfield specialist, mixed a heavy focus on facilitation with deep content knowledge and arts-specific quantitative data.

However, there *did exist* important distinctions loosely defined by firm size. Smaller firms often emphasized facilitation, used data they collected to prompt discussion among clients, and produced recommendations that represented consensus among client representatives. By contrast, corporate firms like Analytico led with a strong perspective on the correct solution for their clients, and applied standard, quantitative models to clients' information, prompting clients to make decisions based on their results. These differences are surely related to the different levels of financial and staff capacity in larger and smaller firms. Though masking variation, firm size defined salient, distinct models of practice in the field of consulting to nonprofits.

[30] I discuss this at length in Chapter 7.

Conclusion

In sum, the field of consulting to nonprofits, framed by third-party funder involvement and a lack of clear professional standards, is structured along a set of explicit and implicit distinctions between consulting providers. Explicit distinctions include organizational form, services offered, clients served, generalist vs. specialist focus, and firm size. Implicit differences are embedded within size and focus distinctions between firms, and include differences in approach, default data and analyses, and knowledge. Considered at a high level, these distinctions indicate a significant divergence in practice among providers of different size in the field of consulting to nonprofits. Larger firms tend to draw on significant analytical capacity, national networks, and consistent models to produce strong opinions regarding clients' optimal solutions, while smaller firms tend to use their process expertise and local or subfield-specific-knowledge to collaboratively generate solutions on which clients can agree. Comparing the cases of Analytico, WorldAdvisors, FocusImpact, ArtsNow, and InsightSolutions highlights the variation between these distinctions, painting a portrait of the field that will guide this dissertation.

Chapter 3
Methods[31]

What Counts as a Nonprofit Consulting Firm?

As the last chapter made clear, specifying who and what counts as a nonprofit consulting firm was a formidable challenge for this dissertation, as these organizations exist in myriad forms. For the purposes of this dissertation, I focus on a sliver of the field--firms that provide strategic planning services to nonprofit organizations--though I at times touch on other related work, including capacity building and organizational development, business and expansion plans, facilities plans, and program evaluations.

As I described in the last chapter, in my research the lines between these services often blurred, and all entailed auditing and assessing client nonprofits' existing practices and procedures and developing recommendations for future improvement, with an eye to linking goals, activities, and outcomes. The focus of consultants' recommendations differed in each case--in a facilities plan consultants might recommend components to include in a new physical structure, in an organizational development project they might recommend a new organizational chart or internal procedures, and in an expansion plan consultants might identify elements of existing programs that are conducive to replication. Additionally, these services differed in their temporal focus--while strategic plans focused on the future, program evaluations focused on the past. However, in all cases, via these services consultants identified problems or gaps in existing plans and practices, and normatively proposed ideas to replace them. These services are therefore well-suited to this dissertation's focus on consultants' role in the diffusion of management ideas in the nonprofit sector.

[31] This methodological approach received approval from Princeton University's Institutional Review Board, protocol #8261.

As described in the previous chapter, the firms on which I focus often provided additional services to nonprofits as well, such as fundraising and capacity building; some focused on a particular subsection of the nonprofit sector, others were generalists. Within this focus on firms that provided strategic planning services, this dissertation primarily focuses on "boutique" consulting firms--those providers, including InsightSolutions, with 10-25 employees on average, with this perspective placed in context via interviews and brief fieldwork experiences with sole proprietors, boutique sector-specific firms like ArtsNow, and larger firms like FocusImpact, WorldAdvisors and Analytico.

Overall Methodological Approach

We can understand consultants' practices and the ideas and recommendations they produce by exploring daily organizational practice, and by analyzing moments in which ideas about nonprofit practice are made concrete via the creation of documents, tools, and reports. As such, the primary methodology for this project is ethnography. I conducted long-term (12 months) of ethnographic fieldwork at InsightSolutions and comparative shorter-term fieldwork (2 to 4 weeks) at ArtsNow and FocusImpact, with one day of fieldwork at WorldAdvisors. My ethnographic data collection is supplemented by interviews with four sets of respondents and a field-mapping survey. While I described the firms at which I conducted fieldwork in detail in the last chapter, for completeness I will recapitulate their general characteristics here.

Long-Term Ethnography

To align with this project's focus on practices, I conducted 12 months of ethnographic fieldwork at InsightSolutions, a consulting firm that served nonprofit organizations in Philadelphia, Pennsylvania.

Case Selection

For my long-term ethnographic fieldwork I selected a boutique consulting firm, with the goal to understand the day-to-day practice of a typical firm in terms of organizational size, business model, reputation, and service offerings. InsightSolutions, incorporated as a for-profit firm, had 12 full-time staff and a generalist approach (i.e. *not* specialized in a particular area of nonprofit activity). It was located in Philadelphia, a city in which I have previously studied the nonprofit and philanthropic sectors and am well-informed about the local context. While well-known in the region, the firm had a limited national profile. It offered standard services--strategic and business planning, program assessment, executive search, and fundraising services--to Philadelphia-region nonprofit organizations. While work at many consulting firms entails frequent inter-city travel, this firm's focus on a single area meant that consultants rarely traveled, a feature that facilitated my ethnographic approach. This firm worked primarily with nonprofit organizations rather than foundations, and with a larger proportion of local organizations than national institutions.

Data Collection and Analytical Strategy

I conducted my primary fieldwork between July 2017 and July 2018, through a part-time (3-4 days per week) entry-level research analyst role in which my dual role as researcher and

contributor was known by all firm members and the clients with whom I interacted. I participated as an active contributor and regular team member for approximately 10 client projects during my year of fieldwork, focusing on strategy projects (including strategic planning, expansion, and business-planning projects), but also contributing to the occasional fundraising plan. The projects to which I contributed served clients of varied size and sectoral focus, ranging from environmental nonprofits to museums to social service agencies. Projects ranged in duration from a few months to more than a year, and team sizes varied from two to four firm members. Additionally, I contributed facilitation to the firm's internal strategic planning process, serving as a notetaker and assistant to the managing director. I was not compensated financially by the firm for any work I performed while conducting fieldwork.

I considered all of my time at the consulting firm as active research time; I carried a notebook and took ongoing notes regarding workflows, employee-employee and employee-client interactions, templates, tools, and technologies, team structures and roles, office culture, temporal rhythms, payment systems and client recruitment strategies, and written products (among other areas). I collected, reviewed, and analyzed all assessment tools, frameworks, and periodical articles that consultants in the firm produced, used, and mentioned during my fieldwork. I also observed or participated in as many staff, team, and client meetings as possible, to understand day-to-day office life and the creation and revision process for deliverables. My goal in note-taking was to understand the day-to-day practices by which consulting firm staff produced, vetted, and communicated insights, both in internal team-based work and in interaction with clients, and the assumptions that shaped consultants' work. To minimize my potential to bias firm workings via my contributions, in all tasks I carried out for the firm, I

closely mirrored firm-provided examples, templates, and strategies, using as little of my own language and research strategies as possible.

I open-coded my fieldnotes to identify salient recurring themes, and analyzed my codes using ethnographic *analytical abduction* (Timmermans and Tavory 2012), in which the researcher interprets the results of observations in light of his or her knowledge of existing theory, and adjusts this theory based on surprising results. I produced memos based on my coding and analysis, which I used to develop my argument.

Comparative Ethnography

After the conclusion of my primary fieldwork, I conducted smaller periods of fieldwork at ArtsNow and FocusImpact, with one day of fieldwork conducted at WorldAdvisors, to contextualize my findings at InsightSolutions and provide insight into features deemphasized in my primary site.

Case Selection

Comparison site selection was focused on identifying firms that differed in in size, focus, and context from my primary site, to contextualize my findings and facilitate an understanding of organizational elements that were less prominent in my primary site. ArtsNow was a similarly-sized (to InsightSolutions) specialist, arts-focused firm located on the East Coast that offered strategic and facilities planning and evaluation services to large and medium-sized arts institutions spanning nonprofit organizations, foundations, and public agencies. I spent approximately four weeks conducting fieldwork at ArtsNow. FocusImpact was a ~50-person generalist firm located in a major East Coast city that offered strategic planning, evaluation, and

capacity building services to large nonprofit and philanthropic institutions. FocusImpact also provided corporations with corporate social responsibility services. I conducted two weeks of fieldwork at FocusImpact, primarily observing its 12-person nonprofit strategy practice. Both comparison firms worked beyond their local context and their staff members traveled frequently. Both were incorporated as for-profit firms, though FocusImpact was a B-Corporation and had a nonprofit subsidiary. I additionally conducted one day of fieldwork at WorldAdvisors (the maximum time allowed, per the firm's policies). WorldAdvisors was a large firm (100+ staff) that was created by a for-profit corporate firm but incorporated as a nonprofit. It provided strategy, evaluation, and many other services to large nonprofit organizations and foundations on a national and international scale.

Data Collection and Analytical Strategy

In my comparison field sites, my fieldwork consisted of observing daily organizational life, including virtual and in-person meetings, phone calls, and office interactions. Like in my primary site, I also collected and analyzed all assessment tools, frameworks, and periodical articles that consultants in the firms produced, used, and mentioned during my fieldwork. Additionally, because firm members traveled frequently for meetings with clients, I shadowed consultants on client site visits--I took three trips via plane to shadow ArtsNow consultants, and one trip via train to shadow FocusImpact consultants. At both ArtsNow and FocusImpact, I also participated in one all-day, whole-team retreat that took place at an offsite location.

My analytical strategy was consistent with the strategies I pursued at my primary site. By inductively coding and analyzing data from the three comparison sites, I contextualized, challenged, and deepened my findings from InsightSolutions, illuminating taken-for-granted

assumptions that were shared between firms, and providing a window into how consulting practices differed in firms of different size and prominence as well as generalist vs. specialist focus.

Interviews

I supplemented this fieldwork with 180 semi-structured interviews with four groups of respondents--the staff and clients of firms where I conducted fieldwork, foundations, and other consultants.

Interviews with Firm Employees

I conducted semi-structured interviews with all firm employees at InsightSolutions and ArtsNow, and with select employees at FocusImpact. Interview questions focused on day-to-day work practices and processes, client relationships, and perspectives on consulting work and the broader sector; questions were customized to each respondent. In total, I conducted 32 interviews with InsightSolutions staff, including interviews with new and part-time staff and multiple interviews with seven staff, 12 interviews with ArtsNow staff, including multiple interviews with two staff, and 11 interviews with FocusImpact staff, including multiple interviews with one consultant. Interviews lasted between 30 minutes and 1.5 hours, and were alternately recorded or documented via written notes, according to the consultant's preference. Interviews were conducted either in person (out of the office or in a private in-office space) or over the phone.

Interviews with Client Nonprofits and Foundations

Additionally, I conducted semi-structured interviews with representatives of 18 InsightSolutions client organizations. I first targeted for interviews client organizations to whose projects I contributed or observed as part of my ethnographic fieldwork, as I had the most independent information about these projects. Additional interviewees were selected to ensure that the set of interviewed clients was representative of the population of clients served by the firm. These interviews provided insight into clients' reasoning for hiring consultants, their methods for selecting consultant partners for particular scopes of work, their experience of consulting processes, and the perceived results or impact of the work on their organizational practice. Client interviews were conducted at the end of my fieldwork period at InsightSolutions, to minimize bias related to my relationship with the consulting firm.

I additionally conducted 20 interviews with foundations who had hired or worked with consultants in the recent past, including interviews with 15 discrete organizations and multiple interviews with five funders. I focused interviews on funders in the same cities and regions in which my focal consulting firms were located, and those who are nationally recognized as outspoken regarding consultants' involvement in nonprofit work.

Interviews with clients lasted approximately 30 minutes, and interviews with funders lasted between 30 minutes and one hour. Interviews were alternately recorded or documented via written notes, according to the interviewee's preference. Interviews were conducted either in person or over the phone.

Interviews with Other Consultants

I conducted a total of 87 interviews with other nonprofit consulting professionals. This number represents 62 distinct individuals and 57 distinct firms, as some consultants were interviewed more than once and at some firms, multiple employees were interviewed. Interview selection focused on ensuring representation of consultants located at different points in the field--for example, sole proprietor consultants, corporate management consulting firms, firms that serve both for-profit and nonprofit clients, and boutique firms. I focused interviews with sector-specific consultants on those who serve arts and cultural organizations, as I have significant background knowledge and understanding of this area of nonprofit activity. Given that interviews with sector specialists often included significant field-specific jargon, this background knowledge facilitated my comprehension and helped me know when and how to ask follow-up questions. I interviewed consultants at four corporate firms that serve both nonprofits and corporations (4 interviews), and five large firms that serve only nonprofits and foundations (21 interviews, with 8 interviews conducted with five total staff at WorldAdvisors and 8 interviews with five total staff of another large firm, plus one interview each with a staffmember at three additional firms). I conducted 22 interviews with consultants at boutique generalist firms, representing 16 distinct firms, and 11 interviews with consultants at boutique arts-specialist firms, representing 8 distinct firms. I also conducted 28 interviews with sole proprietors, representing 19 distinct organizations. Most of the consultants I interviewed worked in firms incorporated as for-profit firms, while others' firms were incorporated as nonprofit

organizations; a few were B-Corporations. Thirty-six of my interviews with consultants were conducted with women and 26 interviewees were men.

Interviewees were identified via chain referral, in which I asked prior interviewees whether there were any additional consultants with whom they recommended I speak, and contacted those recommended, supplemented by local networks and professional association directories. Interviews were conducted either in person or over the phone. Through questions about organizational operating procedures, methods, and tools, as well as organizational networks and relationships, these interviews served to gauge the representativeness of the insights on consulting practices derived from my field sites, illuminate taken-for-granted assumptions that were shared between firms, get a sense of the organization of the consulting field, and better understand the relationships of competition, collaboration, and emulation between different types of organizations in the field. These interviews also allowed me to identify salient distinctions in the field, and to map where different types of consulting firms fell with regard to these distinctions. Interviews lasted between 30 minutes and 1.5 hours; some took the form of multiple sequential 30-minute interviews, to correspond with consultants' busy professional schedules. Interviews were alternately recorded or documented via written notes, according to the consultant's preference. Interviews were conducted either in person or over the phone, with the majority conducted over the phone.

In addition to individual interviews, I conducted one group interview with the entire staff of a boutique consulting firm, attended two conferences of professional associations targeted at consultants to nonprofits (one national Alliance for Nonprofit Management conference and one local Association of Consultants to Nonprofits meeting in Chicago), and several hourlong Alliance for Nonprofit Management webinars targeted at "capacity building organizations." At

each of these events, I took notes and participated in conversations with consultants as appropriate, always revealing myself as a researcher and graduate student.

Survey

Toward the conclusion of my qualitative data collection I conducted a survey of philanthropic foundations, which broker many nonprofit consulting engagements. The survey was distributed via Qualtrics in partnership with the Foundation Center, and positioned as a follow-up to McGill et al.'s 2015 survey about consultant use. McGill et al.'s survey

> was sent to the primary contact for all community, corporate, and independent foundations that reported giving of $100,000 or more in 2012 for which Foundation Center had contact information (N = 4,517) at the end of December 2013. Twenty-three percent of contacted foundations completed the survey (N = 1,031). (7)

McGill et al.'s survey found that 1/3 of respondent foundations had used consultants in the previous 2-year period. Questions focused on consultant use by foundations (whether and how many times the foundation had used a consultant in the past two years, for what purpose, and for those that did not use consultants, why not), how hired consultants were identified, satisfaction, and the benefits or challenges of working with consultants.

The goal of the follow-up survey was to build a relational map of the field of consultants to nonprofits--to understand what kinds of foundations hired consultants to work for themselves and for their grantees, identify the degree to which clients were shared between consulting firms, who worked with whom, and the level of funders' financial investment in consulting work. It requested information regarding the frequency of consultant use by foundations over a two-year period on strategy and evaluation-related projects; with which consulting firms foundations and grantee organizations worked (types and names of particular firms); reasons for hiring consultants; how consultants were identified; the level of financial investment in consultant

work; and the perceived impact of consulting work on client foundations and grantee nonprofits, among other related topics. The survey was distributed to the Foundation Center's entire database of community, corporate, and independent foundations that reported giving of $1,000,000 or more in 2018 and for which email addresses were available in February 2019 (N=1,589).[32] This database is known to over-represent large foundations. The survey was open between February 7, 2019 and April 30, 2019, and yielded 92 valid responses (some of which were incomplete), for a response rate of 6%. The vast majority of respondents were independent foundations (as opposed to community foundations or company-sponsored foundations), representing a wide geographic distribution concentrated in states with major cities (California, New York, Illinois). Respondents' 2017 total assets ranged from just over $1 million to over $11 billion, with an average total assets of $403 million and median total assets of $65 million. Results indicated that 2/3 of respondent foundations had used consultants in the previous two-year period, double McGill et al.'s (2015) results and suggesting potential bias in survey respondents toward foundations that use consultants. Given this and the poor response rate, the results of this survey are used as context in this dissertation, but are not used as primary drivers of argument or analysis.

Access, Positionality, and Feedback

It is important to note that my interest in consulting to nonprofits stemmed in part from prior professional experience in the field, experience that also surely facilitated access to the consultants with whom I conducted fieldwork and interviews. Before graduate school, I worked in a nonprofit subfield specialist consulting organization that provided program evaluation

[32] Note that these more stringent inclusion criteria were chosen based on the guidance of Foundation Center staff, who suggested these criteria based on a five -year review of survey responses in which low- and no-responses organizations were eliminated.

services focused on science learning to museums, schools, and afterschool programs. I also served as project manager for my organization's own strategic planning process, which was facilitated by an outside consulting firm. Through these experiences, I was exposed to the general model of consulting to nonprofits, as well as some of the questions--about consultants' assumptions, the ideas about good practice they promote, and the involvement of funders in consultants' work--that prompted this dissertation. My previous experience in consulting meant that I was able to parse the jargon that consultants used in preliminary interviews for this dissertation, at least enough to ask good follow-up questions. I presume that my previous experience in consulting also helped firms feel confident in my ability to productively contribute to their work while conducting fieldwork, easing my field site access.

However, this prior experience also at times challenged me to avoid "going native" and risk losing my critical lens on consultants' work. While my previous experiences, my status as a young, middle-class woman, and my identity as a professional committed to civil society and social justice all shaped both my data collection processes and my interpretations and analyses of consultants' work, I strove to maintain a critical distance in order to produce a rich and rigorous account of consulting to nonprofits. I also iteratively discussed my observations and findings with my interlocutors. I presented my emerging findings to InsightSolutions and FocusImpact at the conclusion of my fieldwork at each firm, and discussed in-development ideas with individual consultants at various points in my data collection, analysis and writing process.

Chapter 4
Provocative Peers and Powerful Stakeholders
Mosaic Replication and Rationalization

In most strategic planning projects, consultants engaged clients in a multi-stage inquiry process intended to produce options for and then agreement about the client's plan for the subsequent 3 to 5 years. In order to produce these options, however, consultants first "assessed the [client's] situation" by seeking and synthesizing information both about their client organization and about a set of other organizations and individuals. Consultants called these information-gathering steps peer research and stakeholder interviews. In institutional theory, consultants are positioned as agents of normative isomorphism--structural homogeneity via the diffusion of similarly-trained professionals--in institutional fields. Specifically, consultants are theorized to spread nonprofit rationalization, defined by Hwang and Powell (2009) as the imposition of "formalized roles and rules […] entailing the construction of nonprofits as 'actors' with clear identities" (272). Given this, we might expect that consultants' research processes, in which consultants compare clients with other organizations in order to surface options for the future, would contribute to their rationalizing and homogenizing roles. While the relevant options for nonprofits of different type and focus would clearly differ, we might expect consultants to look to similar exemplar organizations across client organizations and suggest common practices, especially managerial strategies and organizational structures,[33] associated with rationalization.

In this chapter, I analyze how consultants conducted research and gathered information about their nonprofit clients, and how this process shaped the ideas consultants transmitted to

[33] Recall that in this dissertation, by "organizational structure" I refer both to formal organizational structure and to nonprofits' programmatic structure.

nonprofits. I show that consultants' research process was more complex, and produced more varied results, than institutional theory predicts. Crucially, in conducting their research, consultants had to decide *what* information to gather about client organizations, and *to which* other organizations clients should be compared. I argue that rather than disseminating consistent rationalized practices across nonprofits, consultants' research processes introduced *variation* into the options for organizational structure consultants offered to clients.[34]

Consultants defined unique peer and stakeholder groups to which each client belonged and directed clients to distinct options depending on these groups. Additionally, consultants' decisions to make their research efficient and accomplishable shaped the relevant options that emerged in the course of their research and the key variables over which consultants suggested clients had control. Specifically, consultants' strategies to synthesize information, the dual purpose they posited for interviews, and the centrality of client leadership in consulting work pushed their recommendations toward replicating common nonprofit practices and power structures, rather than making nonprofits more rational. And when consultants did offer recommendations associated with rationalization (Hwang and Powell 2009), these same strategies influenced the particular practices consultants promoted.

While such replication and rationalization appear to align with arguments that consultants homogenize nonprofit managerial practice (Hwang and Powell 2009:293), I show that this was not the case. Instead, consultants promoted *mosaic* replication and rationalization--they rationalized nonprofits and promoted copying existing practices *within* the unique peer and stakeholder groups that consultants defined for each client, while generating variation *between* these groups. This produced an irregular mosaic of practice across the field. As agents of

[34] Insights from this chapter were included in an Op Ed that has been accepted for publication by the *Chronicle of Philanthropy.*

normative isomorphism in the nonprofit sector, then, consultants drew on externally legitimated ideas, client particularities, *and* the characteristics of their own knowledge production to influence client organizations and the fields in which clients were situated. In doing so, consultants produced variation and promoted *mosaic* replication and rationalization, instead of diffusing consistent models of rationalized practice across nonprofits.

In what follows, I make my argument in five parts. In Parts 1 and 2, I review relevant literature and introduce the steps in the consulting process that I analyze in the remainder of the chapter--peer research and stakeholder interviews. In Part 3, I describe consultants' processes for selecting peers and stakeholders, showing how these selection processes generated unique peer and stakeholder groups for each client nonprofit that varied across clients and consulting firms. In Part 4, I analyze how consultants conducted research about peer organizations and the dual purpose they posited for stakeholder interviews, showing how consultants' practices promoted mosaic replication of existing nonprofit practices. In Part 5, I describe the elements of nonprofit practice on which consultants focused in their peer and stakeholder research and overall consulting engagements, arguing that consultants' practices promoted mosaic rationalization of nonprofits. I end by summarizing the chapter's overall argument and contribution.

Part 1: Consultants and Institutional Theory

Consultants as Institutional Entrepreneurs and Agents of Isomorphism

A major focus of organizational sociology has been the ways in which organizational fields emerge, consolidate, and change. DiMaggio and Powell (1983) and Meyer and Rowan (1977) argued that institutional change in organizational fields is driven by the pursuit of legitimacy. In earlier theories (e.g. Simon [1947] 1997), formal organizational structures were

thought to instantiate rational theories of action that, linked together by goals and policies, enabled the coordination and control necessary for success. In contrast, Meyer and Rowan (1977) argued that organizations with ambiguous performance standards and that experience conflicting demands from external actors take on structures in pursuit of legitimacy, rather than efficiency--taken-for-granted structural elements become normative obligations for organizations in order to be perceived as legitimate. The spread of such institutionalized forms, Meyer and Rowan argue, promotes isomorphism in organizational fields and decoupling of organizational structure and practice. DiMaggio and Powell (1983) correspondingly described the mechanisms by which such institutional forms spread across organizations--coercive isomorphism, in which powerful entities exert pressure on organizations to adopt legitimated structures; mimetic isomorphism, in which organizations imitate their successful peers to manage in uncertain environments; and normative isomorphism, in which legitimated forms spread via a professionalized workforce that disperses similarly-trained professionals across organizations.

Organizational forms are also linked to broader societal institutions that they "render material and thus potent to shape human behavior" (Haveman and Rao 1997:1613). In this context, institutional entrepreneurs work to align organizational forms and wider societal institutions, and to translate macro-institutional shifts into changes at the organizational level (Haveman and Rao 1997; Hallet and Ventresca 2006). Professionals in general play such an entrepreneurial role by creating frameworks and normative behavioral prescriptions, translating frameworks and regulations into particular communities, and applying general ideas to specific cases (Scott 2008; Muzio, Brock and Suddaby 2013). Greenwood et al. (2011) added that people act as "carriers" of institutional logics in organizations and that the carrier's power and involvement in decision-making influences what happens next. Consultants, as carriers of

management knowledge into organizations (Faust 2012) and of rationalization into nonprofits (Hwang and Powell 2009), can be viewed as both agents of normative isomorphism and institutional entrepreneurs.[35]

Arguing that theories of institutional entrepreneurs allotted people too much agency in institutional change, Powell and Colyvas (2008) clarified that institutions change as people "muddle through" everyday organizational life, drawing on extant mental models to align and interpret institutional expectations on the fly (3). Through this process, local actions viewed as necessary responses to circumstances alternately add up to larger organizational change or institutional continuity. Muzio, Brock and Suddaby (2013) more clearly defined professionals' role in institutional maintenance and transformation, explaining the "institutional work" approach that suggests that actors do not simply act as "cultural dopes," unwittingly participating in institutional maintenance through their daily lives. These authors suggest instead that actors engaging in institutional reproduction often do so unwittingly, while those engaged in institutional change often adopt some degree of awareness or intentionality.

Creating Categories: Ontological Gerrymandering and the Social Distribution of Attention

As part of consultants' role in institutional maintenance and change in the nonprofit sector, the practices by which consultants selected clients' peer groups and the characteristics on which to focus within those group introduced variation into clients' options and the practices consultants promoted to clients. Geographer Russell Prince identified consultants' field-shaping

[35] However, the organizational ecology tradition in organizational analysis points out the difficulty such entrepreneurs encounter in trying to shift organizations' structures and thus institutional alignments. Scholars argue that organizational fields shift more through selection--the dying off of old forms--rather than adaptation, especially in fields with high degrees of structural inertia (reliability, routinization, and accountability), that promotes stability and form reproduction (Hannan and Freeman 1984).

role in a 2014 project about cultural consultants in the United Kingdom. Consultants, Prince argued, produced the cultural sector by mapping it, thus making the sector visible and intelligible, and evaluating it, thus embedding ideas of what counts as cultural work. Prince clarified that via these strategies consultants influence the sector by facilitating resource access for the groups with which they work. Prince argued that consultants focused their work on places where cultural activity could be translated into profit for client and consultant, necessitating the exclusion of certain kinds of work and producing new definitions of cultural work.

To analyze this process among consultants to nonprofits I draw on work on standards and classification from Science and Technology Studies. I reviewed this literature (and its major contributors, including Bowker and Star (1999)) in the introduction to this dissertation and will describe it in more detail in the following chapter--given that, I will not repeat it here. Broadly, however, I leverage this literature in order to analyze how consultants' research processes and methods to determine clients' peer and stakeholder groups, although appearing objective and common sense, affected the options consultants presented to their clients. This can be considered a process of ontological gerrymandering (Woolgar and Pawluch 1985), in which consultants delineated the categories under which organizations and peers were to be analyzed while backgrounding the assumptions that went into selecting these variables. As Woolgar and Pawluch put it, in ontological gerrymandering "certain phenomena are highlighted as the legitimate and pertinent objects of study which require explanation while other phenomena, although in principle equally amenable to this treatment, are backgrounded and taken as given." (224). This process resonates with Eviatar Zerubavel's (2015) work on the social distribution of attention--Zerubavel points out that what we notice and ignore is socially patterned by the various "attentional communities" in which we participate. Like Woolgar and Pawluch's

ontological gerrymandering, Zerubavel points out that attentional communities, including professions, condition us to focus on certain things and apply "intellectual blinders" to others.

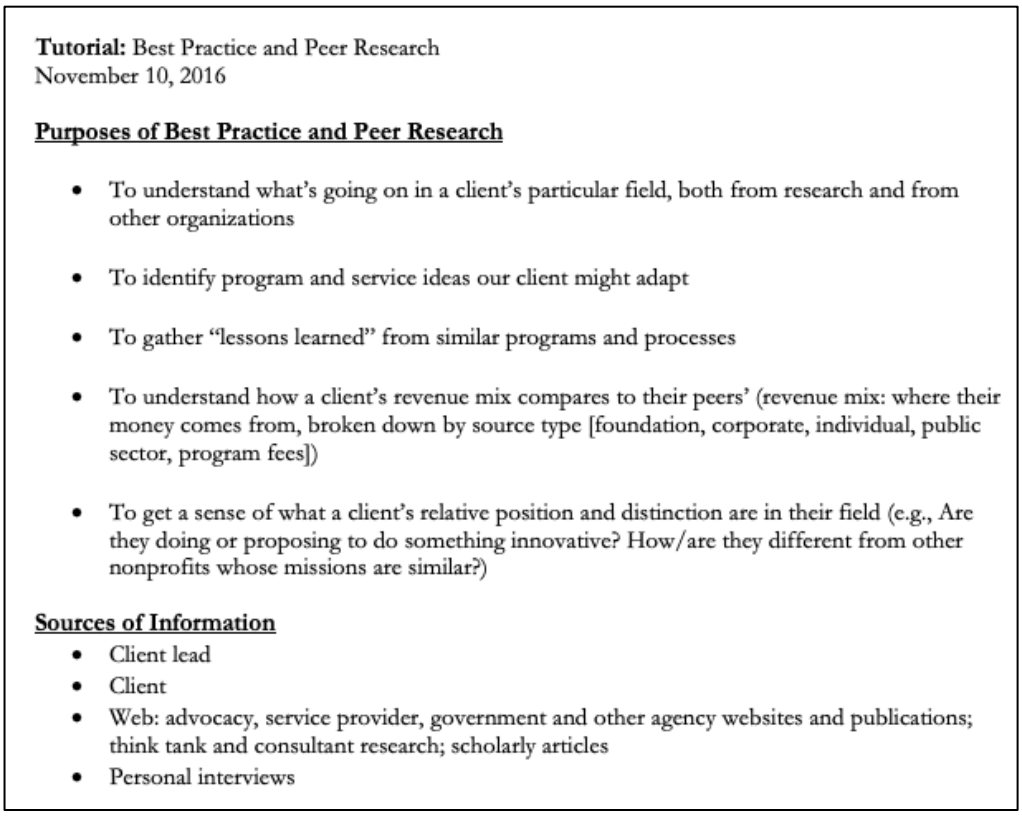
Walker (2014) outlined the potential consequences of such gerrymandering in his study of consultants who orchestrate lobbying campaigns on the federal government. Walker described how consultants curate public participation such that only certain groups of citizens--often educated and advantaged populations--voice their opinions, restricting the relevant sets of opinions for consideration to certain groups. Similarly, Harrington (2016) showed how private wealth managers shift and manipulate institutional structures to benefit their clients. As this chapter will show, consultants' work processes similarly affected which organizations counted as client peers and under what circumstances, and which characteristics were most important within these peer groups. While nonprofit consultants' methods of doing so may have been less diabolical or intentional than what Walker and Harrington described, their impact was similarly significant, shifting consultants from homogenizing nonprofit organizational structure to producing variation across clients.

Part 2: Ad Hoc Peer and Stakeholder Groups: Generating Options and Opinions

In the first stage of the strategic planning process, consultants conducted research to assess their clients' internal operations and position in their field, and surface and evaluate relevant options for the future. While consultants compared clients to other organizations throughout the course of strategic planning, as part of most projects I observed at InsightSolutions, FocusImpact, and ArtsNow, consultants to nonprofits included two overlapping phases of work specifically focused on such comparative exploration--peer research and stakeholder interviews.

Peer Research

Alternately called "peer," "comp," "exemplar," or "aspirant" research, this step in the strategic planning process typically involved defining a set of organizations as the client organization's "peers" and then conducting focused research about these peers, using specified parameters. Bowker and Star (1999) cautioned that while such categorization and classification appear mutually exclusive--an entity either is or is not a peer--in reality, such decisions are endlessly contested and negotiated. During my first week at InsightSolutions, Margaux gave me a tutorial on this process, which was typically conducted by low-level staff members. She told me that the goal of peer research was to "look out into the field and figure out what other people are doing." She continued that in strategic planning, peer research typically entailed looking for organizations with similar programs and messaging about their work, but also for "interesting or surprising practices […] looking at what sets them apart in terms of success." She gave me an instructions document, which helped clarify the task:



Tutorial: Best Practice and Peer Research
November 10, 2016

Purposes of Best Practice and Peer Research

- To understand what's going on in a client's particular field, both from research and from other organizations
- To identify program and service ideas our client might adapt
- To gather "lessons learned" from similar programs and processes
- To understand how a client's revenue mix compares to their peers' (revenue mix: where their money comes from, broken down by source type [foundation, corporate, individual, public sector, program fees])
- To get a sense of what a client's relative position and distinction are in their field (e.g., Are they doing or proposing to do something innovative? How/are they different from other nonprofits whose missions are similar?)

Sources of Information

- Client lead
- Client
- Web: advocacy, service provider, government and other agency websites and publications; think tank and consultant research; scholarly articles
- Personal interviews

Illustration 3: Instructions for Peer Research

According to Margaux' tutorial, peer research functioned to illuminate the context of the client's organizational field, to identify program ideas that clients might utilize, to understand the client's financial performance and composition in comparison to others in the field, and to assess the client's competitive position in the field and begin to define what made it unique in comparison to other organizations. At ArtsNow the peer research process, which ArtsNow consultants called "comps and exemplars,[36]" proceeded similarly. As Natasha explained, the point was to figure out "what can we copy that they're doing right, and avoid what they're doing wrong?" The process

[36] Natasha from ArtsNow suggested that this terminology derived from the real estate field.

was used to generate a set of common and (by the consultant's judgment) exemplary and unsuccessful practices to inform the client's strategic plan.

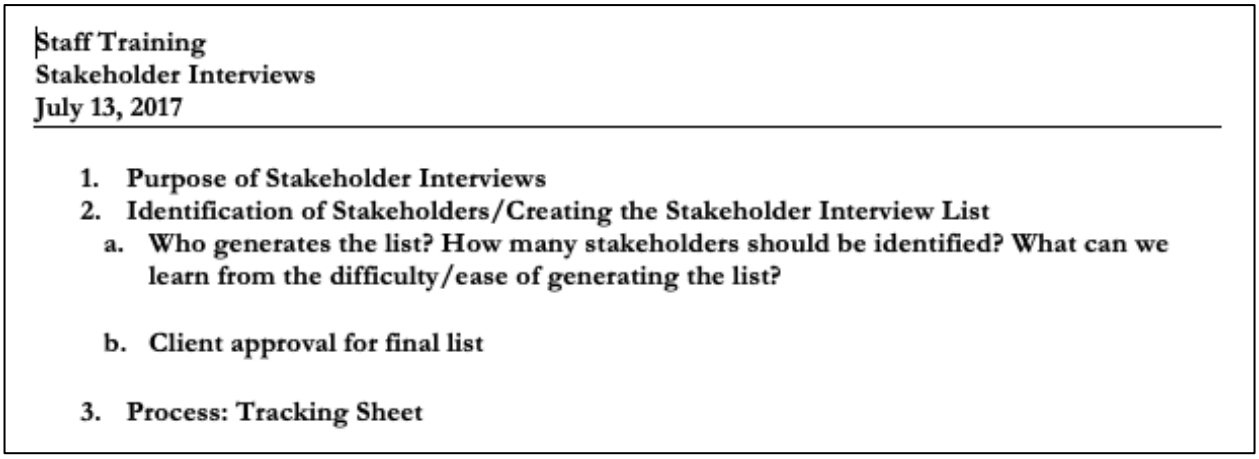
While InsightSolutions consultants referred to the peer group they generated as representing their client's *field*, in reality this "field" was better defined as a peer group of organizations that occupied a similar location in their larger institutional field. The process consisted, then, of defining a set of peer organizations that was relevant to the client, and then selecting particular measures by which to establish the client's structural and competitive position related to these peers and the broader field. The peer research process thus resembled the corporate practice of benchmarking, in which firms compare themselves to competitors that they assess to be "best in class" in a particular area (Shetty 1993), and the concept of "strategic groups," the group of competitors that firm managers perceive to share the same basic characteristics and strategies, and that serve as reference points and sources of ideas (Panagiotou 2007). Sturdy et al. (2009b) mentioned such comparison to other organizations in their study of consulting, suggesting that what counted as the relevant "sector" was contested and "under construction" in consulting work (103-109).

Indeed, the peer groups that consultants initially generated via InsightSolutions' dedicated peer research process then grew and shifted over the course of the strategic planning process, as consultants compared their clients to additional organizations on an ad-hoc basis. Peers that consultants perceived to be most similar to their clients were identified at the beginning of consulting engagements and used to assess the degree to which clients were unique in their field, whether clients used the field's standard practices, and, based on these assessments, to begin to identify the client's competitive field position. As strategic planning processes unfolded, consultants then used these similar peers, along with examples of previous clients, to

identify relevant options for clients' futures and potential strategies to solve clients' problems. Additionally, peers that consultants felt to have interesting or exemplary practices or that were notable in the client's field were raised throughout the process and used as aspirational reference points for clients, to "push" their thinking in new directions and illustrate potential tradeoffs related to clients' decisions. Through this ad-hoc process, consultants constructed a unique, heterogenous, and sometimes ephemeral peer group for each client over the course of the consulting engagement.

Stakeholder Interviews

Concurrently with defining clients' peer groups, consultants conducted interviews with a set of individuals relevant to each client nonprofit--the organization's "key stakeholders." This set of individuals, jointly determined by consultants and their clients, typically included key staff members, partner organizations, current or prospective institutional funders, and, at times, select audience members or users of the client organization's services. Again, Margaux's training materials clarified the process:



Staff Training
Stakeholder Interviews
July 13, 2017

1. **Purpose of Stakeholder Interviews**
2. **Identification of Stakeholders/Creating the Stakeholder Interview List**
   a. **Who generates the list? How many stakeholders should be identified? What can we learn from the difficulty/ease of generating the list?**
   b. **Client approval for final list**
3. **Process: Tracking Sheet**

Illustration 4: Instructions for Stakeholder Interviews

Consultants adjusted the number of stakeholders they interviewed according to the nature and budget of the project; projects also varied in the degree to which the client versus the consultant generated the list of stakeholders to interview. In all cases, however, the client approved the final list of interviewees.

In the course of planning, consultants used stakeholder interviews to inform their assessments of clients' field positions, evaluate the programmatic options surfaced through peer research to identify promising options for clients' futures, and identify additional peer organizations that consultants had not previously considered. As such, the characteristics and perspectives of the individuals selected for stakeholder interviews, consultants' methods for accessing these stakeholders, and the effects of project budgets on the interview process influenced consultants' assessments of client organizations' field positions and the options for the future that consultants promoted to clients.

Part 3: Selecting Peers and Stakeholders: How Ad-Hoc Peer Groups Generate Variation

In this section, I will explain consultants' processes for generating the organizations and individuals that they researched in the course of peer research and stakeholder interviews. I will show that consultants' selection strategies yielded *unique* peer and stakeholder groups for each client. As the rest of the chapter will go on to demonstrate, these unique peer and stakeholder groups in turn generated variation in the options consultants promoted to clients, rather than homogenizing nonprofit organizational structure.

Googling for Close Peers

To build clients' peer groups, consultants first attempted to identify organizations that closely resembled their client. Morgan at ArtsNow gave me an overview of the firm's process. She explained that she and her colleagues started by determining the most important elements of the client's organization: "Okay, what are the things that matter most? Is it the fact that this is such a small market or geography, is it something about the way that they're governed or operated?" She continued, explaining how she narrowed her search from that point: "We start with the world of all that exists, and we use those toggles to bring it in, bring it in, bring it in." Eventually, she admitted that the final list came down to consultant discretion. "If we have to narrow it down even further, who do we cut? Then we're starting to use discretion."

Sara at InsightSolutions assigned me such research for a domestic violence client, directing me to use Google to look for "organizations who do this work in DC, New York City, and Baltimore. So those close peers. Also maybe organizations with similar budget sizes and funding mixes, potentially?" She directed me to add two other local organizations with similar programs but different topics of focus. As InsightSolutions' instructions sheet for peer research cautioned, "make sure you know what really constitutes a peer. If something is close but not the same, articulate what the differences are and why you're including it." In peer research lower-level staff followed senior consultants' direction to conduct web searches for clients' "close peers," which translated to organizations in major metropolitan areas that consultants felt closely resembled their clients in terms of structure, size, and mission, supplemented with senior consultants' knowledge of relevant local organizations. The close peer selection process thus involved significant discretion on the part of consultants, who selected what they perceived "mattered most" to clients--often something related to their structure or the characteristics of

their environment, then used web searches to narrow in on organizations they felt closely resembled the client on these dimensions.

This task, of selecting clients' peer set, is evocative of Eviatar Zerubavel's notion of "islands of meaning," within which elements are considered more similar to one another than elements outside of the "island." Zeruvabel argued that such islands are defined via two cognitive processes--lumping, in which individuals flatten the differences between elements to produce a perception of homogeneity within a mental field, and splitting, in which individuals exaggerate the difference between elements to better define islands of meaning against each other. Via these processes, Zerubavel argued, we engage in active "sculpting" of mental clusters--we construct the similarity and differences of things in our environment, rather than simply observing natural distinctions (1991; 1996:422).

In the course of defining clients' peer sets, consultants used their perception of organizations to lump sets of potential peers together and split these organizations off from other peer candidates. A conversation between Anna and Natasha at ArtsNow serves as an example. Earlier in the week Anna had explained that during comparative research at ArtsNow, the consulting team generated a set of parameters on which to compare the client organization and gave them to a staff member in charge of managing the firm's databases, who pulled a set of previous clients that matched these specifications from the firm's records. Consultants then narrowed down these options to sculpt the final peer set. Anna paused in her research, looking up from her computer and swiveling her chair to face Natasha. "Do you know the Florida Ballet? Are they prestigious?" Natasha replied that she did not know, swiveling to scoot closer to Anna. Anna sighed. "If you haven't heard their name, then they probably aren't prestigious. Isabel's nieces recommended some organizations--but I think they are too big, we are looking for second-

tier organizations." Anna and Natasha used their personal knowledge of particular organizations, referrals from network connections, and their perceptions about organizations' level of prestige to confirm or disqualify these organizations' similarity to their clients and thus candidacy as peer organizations.

Consultants reinforced the salience of the close peer groups they defined by rendering client problems intelligible with reference to these groups. Indeed, consultants at times reoriented the close peers relevant to a client organization to frame the client's problem as unsurprising. During a presentation for a theological seminary that was struggling with its relationship to its surrounding neighborhood, Isabel from ArtsNow spoke in front of a group of clean-looking professionals in a newly-built, airy conference room. "We had this realization early in the process--we realized, you're not a religious institution, you're higher ed! If we define you that way, it's the same position you're in that all of your peers are. Town/gown is really real, and some are pushing the issue a lot, and others say, we are the ivory tower, that's who we are." Isabel re-categorized the client from a religious institution to an institution of higher education to redefine the organization's problems and questions as endemic to the group of close peers to which the client belonged.

Consultants' reliance on Google searches to identify close peers favored prominent organizations and those with strong enough marketing and communications as to be easily found online, over organizations that may have more closely resembled the work of client nonprofits but that lacked this visibility. For example, for an InsightSolutions' activist church client, consultants selected the 92nd Street Y in New York City and Glide Memorial Church in San Francisco, two very prominent, religiously-affiliated activist organizations.[37] Within this set of

[37] This decision was also influenced by the client Executive Director's preferences and aspirations.

organizations, consultants established peer status on the basis of similar formal organizational structure, size and mission, all characteristics easily found online. Additionally, the role of personal perception in identifying and narrowing down clients' close peers introduced significant variation into peer sets, as the makeup of peer groups flowed from the perceptions of the particular consultants involved in the project and the strategies lower-level staff used to conduct internet searches. For example, while Natasha had not heard of the Florida Symphony, leading Anna to conclude that this organization was not prestigious enough to include in the client's peer set, another ArtsNow consultant may have been more familiar with this organization and lead Natasha to include it. Given that consultants used close peers to assess the degree to which clients adhered to standard practices or were unique in in their field, and to surface relevant options for clients' futures, this variation, generated early in clients' planning processes, was carried forward through the course of strategic planning. As I will show later in this chapter, this variation helped generate divergent future options for clients with different peer groups.

Mining Networks for Analogs

As Anna and Natasha's conversation suggested, in addition to web searches and personal perception, consultant networks played a major role in identifying peer organizations. Both during dedicated peer research steps and on an ad-hoc basis throughout planning processes, consultants, generally "client leads" (typically partners or other senior staff), compared their clients to other "analog" organizations, informally generating additional peer organizations through personal and professional networks. These analog peers, accumulated over the course of projects, were used in conjunction with close peers to identify relevant options for clients' futures and potential strategies to solve clients' problems. For example, Ines and Margaux

identified a set of peers for Historic Park during a workshop to help the client establish a new mission statement. They structured the workshop around a "Gallery Walk" activity in which the client representatives would consider their work in comparison to other organizations' mission statements. Together, Ines and Margaux decided that they should offer five mission statements and brainstormed which to include, drawing primarily on past InsightSolutions clients--a local cemetery and park, a classic cemetery, a new urban public park, and an organization focused on historic preservation. Margaux justified her and Ines' choices, reasoning, "they need to be different enough that they suggest different places." At another point in InsightSolutions' work with this same client, Jim suggested a further afield peer for Historic Park. "Have you talked to Sherry Martin?" Ines was incredulous. "Of City Prison? Why?" Jim replied, self-assured. "There is every reason. It's a huge place that was dangerous and decrepit and had a city owner, and then Sherry and others transformed it." Jim identified this peer for Historic Park based on a pre-existing network connection to Sherry Martin and insider knowledge about the organization's history, suggesting that it had similar problems to those experienced by Historic Park.

In another case, Ines identified an arts nonprofit as a peer for a social services client. While presenting client representatives with options for their future, Ines explained:

> The Newhouse Art Center was an arts service organization. Their current neighborhood is a temporary stop in the upward trajectory of wealthy professionals, and they have felt disconnected from community. […] The board decided on totally different direction--sell the building and become a funder. So that's our Newhouse option - admittedly very off the wall. If your mission is impact the well-being of the community, what's the best way to do that?

Ines identified these organizations as similar in that they both provided services to clients, and both were looking for the best way to serve their community--highly abstract principles that defined a very broad reference set indeed for the client organization.

Consultants used their networks and local knowledge to surface additional analog peers for clients beyond close peers, deeming these analog peers relevant if they experienced similar problems or "seemed relevant" to consultants. In doing so, consultants actively engaged in the "lumping" and "splitting" work Zerubavel described--they selected the specific variables using which to evaluate organizational similarity, in this case the nature of organizations' challenges or problems, and flattened remaining differences, in this case, content area, size, organizational structure, and other characteristics (1991; 1996:422).

Marion from FocusImpact clarified the function of analog peers during a conversation about a pitch to a major environmental organization. "What is the best way to structure to accomplish your goal? Looking at unlikely comparatives will be important--pushing the boundary of what effective structure looks like." Analog peers, which Marion called "unlikely comparatives," served to push clients' thinking outside of their immediate context. Indeed, FocusImpact reported that the firm forewent identifying close peers and instead typically *only* looked at analog peers--as one team member put it,

> We tend to do [peer research] later in the process when we have some idea of the direction [the client is] headed, and find organizations to compare against that have gone in that direction to one extreme or the other. It's not just in the beginning like, who else are you doing work with, and what are their structures, what are their sizes, who's on the board.

She clearly delineated how analogs differed from close peers. While the latter peers, which shared similar structure and size to client organizations, were identified early in consultant engagements to generate options and assess the client's field position, the former peers, which faced similar problems or had chosen similar directions as did their clients, were identified later and served as aspirational reference points to push clients' thinking in new directions.

In this process, the characteristics and boundaries of consultants' networks influenced the analogs that consultants framed as relevant to clients. Generalist firms like InsightSolutions that worked across different types of nonprofits tended to identify organizations *from different content areas* as analogs--an arts organization for InsightSolutions' social services client, a prison for an historic park. Indeed, an InsightSolutions description of the peer research step in a client workplan stated this tendency outright: "[InsightSolutions will research mission-analogous and -adjacent organizations elsewhere in the country […] these may include historic parks or other private entities that also function as spaces for recreation and programming." In contrast, subfield specialist firms' use of networks to identify analog peers had a distinct effect. Specialist firms' goals for identifying such peers were similar--as Natasha from ArtsNow explained, "we want [peers] to be provocative without being competitive, and not too familiar. Far enough that they are likely to be new material." However, instead of surfacing examples beyond clients' areas of content expertise, specialist consultants closely defined relevant examples as within client organizations' subfields and that additionally matched the particular characteristics of clients' practices, or their environment.

As an example, during a pitch meeting for a potential museum client, senior ArtsNow consultant Susannah was concerned that ArtsNow had not worked with similar organizations. She and Natasha discussed this issue, arguing that urban and university-based museums were not relevant to the case, a rural museum. They were concerned that their single relevant client, another rural museum, was too large to be comparable. Susannah later explained this reasoning during an interview: "We usually find three to five like museums. They're one of the very few non-collecting contemporary museums in the country, they're actually quite well known and reviewed around the country. We want to find comparable museums." Susannah tightly defined

relevant peers as museums focused on contemporary art but that did not have collections, and were operating in a non-urban setting, using different--and more stringent--parameters with which to lump organizations together and split them apart than did InsightSolutions (Zerubavel 1991; 1996:422). She explained that ArtsNow focused on identifying peer organizations for clients that not only had the same general organizational form as the client, but that also aligned with the characteristics that made the client unique.

This contrasts strongly with InsightSolutions' practice of identifying analogs that shared little with its clients in terms of content focus or organizational characteristics, with peers' relevance based instead on facing similar challenges. For example, for its activist church client, InsightSolutions selected "21st century libraries--places [that are] actively engaging people." While InsightSolutions, as generalists, drew on a broad network spanning local organizations of many kinds, and therefore employed a broad sense of similarity across nonprofits, ArtsNow's deep networks within the arts field facilitated much tighter comparisons. Natasha articulated the density of ArtsNow's network--in her words, a network graph of ArtsNow's past clients "would be a solid oval"--all of the firm's clients had been used as comps and exemplars, and vice versa. For example, for an ArtsNow client consultants targeted "Destination Facilities"--arts organizations that people travel to seek out--and "community-centered cultural institutions," narrowing in within these categories on peers that focused on the same discipline--dance--as the client intended.

Given this distinction, generalist firms potentially produced *a higher level of variation* in client peer sets than did specialists. As I will show later in this chapter, given that consultants used analogs to identify strategies to solve clients' problems and push their thinking in new directions, these network-based distinctions in relevant peers affected the options that consultants

presented to clients, pushing nonprofits in different directions depending on the nature of consultants' networks.

Networks and Choosing Stakeholders

Networks played a similarly central role in how consultants determined the client stakeholders with which to speak during stakeholder interviews. Like in peer research, the limitations of client and consultant networks introduced variation into the perspectives that were included in nonprofits' planning processes. Sara trained me to conduct stakeholder interviews when I first started working at InsightSolutions. We sat together in her small office, which she shared with another staff member. Sara directed me to pull up a chair, handed me printed instructions, and told me that stakeholder interviews were "the most unique [element of the research process] and the consulting advantage shows up most here--it's not publicly available information that anyone can get." She continued that in this step of the strategic planning process, InsightSolutions "interviews internal and external stakeholders, with external comprising donors, funders, strategic partners, and key clients."

Identifying the individuals with whom to speak was a collaborative process shaped by the unique characteristics of each client and led by client preferences. At InsightSolutions, typically individuals were identified via local networks--either the client suggested an individual, or the consultant knew the individual and valued his or her opinion, via professional networks or because the person was a previous client. As Sara explained, the client had to approve every person with whom InsightSolutions spoke, and every question the consultants asked. During stakeholder research, then, the boundaries of clients' and consultants' networks jointly determined relevant perspectives, along with clients' preferences and the simple fact that each

client nonprofit necessarily had different stakeholders. Individuals were identified as potential interviewees via presence in client or consultant networks, and confirmed based on whether the client wanted them interviewed--as Sara said, the client must approve every stakeholder, every question. As such, both the limitations of consultants' and clients' networks and the particularities of clients' preferences affected the perspectives that were included in clients' strategic planning processes.

Susan, a consultant from a small Philadelphia practice, explained this approach, suggesting that clients' preferences *should* determine whom consultants interviewed, because clients were the ultimate experts in their own work: "It's their relationship, right? I can't propose to know them. I know the process, but I'm not running the organization." However, she suggested, consultants did have preferences and made suggestions regarding essential perspectives to include. "I mean, let me look at your donor list, and I'll tell you who I think we should talk to. Who were your major funders? Who were your foundations? Who were your board members?" While clients drove who was interviewed, consultants responded to client-generated lists through their perception of the general types of people who should be included, sometimes pushing back on client preferences.

Indeed, beyond following the client's suggested interviewees, consultants suggested and granted access to additional stakeholders based on their professional networks and past clients. As one member of InsightSolutions put it, this category of stakeholders was sometimes described as "Jim's smart friends." In the case of InsightSolutions' sports youth development client, this manifested as outreach by Jim to particular stakeholders on the client's list, that Jim had suggested and the client approved. Margaux made this clear in a brief meeting with Ines, asking "are these Jim's people?" Ines replied affirmatively, saying that she needed to ask Jim to make

introductions and invite him to participate in the conversations with his contacts. Particular consultants held particular relationships, and each granted access to powerful stakeholders as he or she saw fit, to benefit particular clients. In another case, Margaux instructed me to look through InsightSolutions' Microsoft Outlook address book to find contact information for people with whom the client wanted to speak. As in peer research, consultants' networks were dense--as Margaux put it, "a lot of times potential donors [for one client] have also been engaged as part of a stakeholder process for another client." Often, the individuals to which consultants facilitated access were *aspirational* stakeholders for clients, rather than already involved in the clients' work--while the individuals were usually *aware* of the client organization, the idea was that consultant-facilitated connections might help the client recruit the individual as a funder or supporter.[38] Alternately, sometimes InsightSolutions used these individuals to access sensitive information. For example, after an unproductive phone call with a city employee about the expansion plans of InsightSolutions' sports youth development client, Margaux and Ines decided to ask Jim to call a higher-up city representative to get some clarity. "They know each other, he will give Jim the no-sugar-coated answer." Consultants' networks, then, provided clients with access to powerful field members that they ordinarily would not be able to reach.

The centrality of clients' and consultants' networks in determining which perspectives were included in clients' planning processes meant that the limits of these networks affected with whom consultants ended up speaking. Beyond the general influence of who consultants and

[38] However, consultants stopped short of delivering new stakeholders or donors to clients. This was made clear in a conflict that occurred at InsightSolutions and resulted in a client terminating an engagement. In this case, Jim had pitched a project to a news media client whose leader was his neighbor. Based on Jim's pitch, the client understood that InsightSolutions would introduce them to new donors. However, once underway, the project was passed to other InsightSolutions staff, who clarified that "that's not what we do." Confronted with this inconsistency, a conflict ensued, that resulted in the client walking away from InsightSolutions. While InsightSolutions did engage stakeholders to reinforce relationships between clients and important outsiders, they did not serve as a straightforward broker of financial support.

clients did and did not know, the stakeholder interview process was also constrained by the limits of consultants' networks to particular localities (in the case of boutique generalist firms) or subfields (in the case of specialist firms). At InsightSolutions, consultants' local knowledge and extensive network among local nonprofits, government officials, and funders opened up information channels that their clients did not have. However, this reliance on local networks also limited the universe of possibilities for a client nonprofit's future to the particularities of local networks as well as consultants' perceptions of political and funding systems. At ArtsNow, such limits manifested differently--when a colleague of Arthur insinuated that he had a bias toward large institutions in his work, Arthur rejected this interpretation--"I just have a body of work, I don't have a bias." While Arthur's network was not limited by locality, it was limited by type of organization--the large arts nonprofits that were his clients. Indeed, the networks of larger consulting firms that worked nationally, like FocusImpact and WorldAdvisors, had related limitations--while these firms offered access to national funders, their networks were at times thin in clients' local areas.

Indeed, the limits of consultant networks sometimes affected client organizations negatively, particularly when consultants had *bad* relationships with particular stakeholders. In one InsightSolutions case, Jim was "on the outs" with a funder important to a client's potential merger, making it complicated for InsightSolutions to help that client pursue funding. Relatedly, Natasha at ArtsNow admitted that the firm had been unsuccessful in reaching National Endowment for the Arts leaders on behalf of clients, as they did not have sufficient clout to garner a response. Another case occurred with an InsightSolutions client who had terminated his engagement with InsightSolutions. When the organization's executive later left to lead a major local foundation, InsightSolutions consultants became worried about their ability to speak with

that funder on other clients' behalf--staff members undertook a concerted effort to rebuild their relationship with that individual--as one staff member put it, "its touchy." In such situations, consultants sometimes used client needs as leverage to repair their relationships with powerful actors.

In general, then, while consultants' networks opened access to elite field members for clients, the limits of their networks--in terms of locality, subfield, and collegiality-- were also passed along to clients. When combined with the influence of clients' preferences and the limitations of clients' networks on the set of individuals that were considered stakeholders, these factors produced additional between-client variation in the perspectives that were included in stakeholder interviewing processes. As I will show later in this chapter, given that consultants used stakeholder interviews to inform their assessments of clients' field positions and evaluate the programmatic options identified through peer research, this variation affected the options that consultants later presented to clients, and which options clients framed as optimal.

Recap: Producing Variation

To summarize, in peer research and stakeholder interviews, consultants constructed unique ad-hoc peer and stakeholder groups for each client organization, which in turn generated variation in the options consultants considered for clients' futures and how they evaluated these options. These unique comparison groups were established via two main practices. First, consultants used internet searches to identify close peers for their clients, favoring prominent organizations and those with strong web presences, with similarity driven primarily by formal organizational structure, size and mission. In this process, consultants' strategies to conduct such searches and perceptions of organizations influenced the peers they ended up identifying.

Second, consultants leaned heavily on their and clients' networks, both to generate additional peers for clients, and to select the stakeholders with whom consultants spoke during stakeholder interviews. In this process, the limits of consultants' and clients' networks introduced additional variation into the organizations surfaced as clients' peers and in the people with whom consultants spoke. In the peer research process, the characteristics of consultants' networks determined the "analog" organizations that consultants used to push their clients' thinking in new directions. Generalist consultants compared their clients to organizations from different content areas that faced similar problems, while specialist consultants compared theirs to other organizations within the client's subfield *and* that matched clients' particular practices or environment, suggesting that generalists potentially produced more varied peer sets than did specialists. In the stakeholder interview process, the limits of consultants' and clients' networks in terms of locality, subfield, and collegiality, as well as the particularities of clients' preferences for the people with whom consultants spoke, produced variation in the perspectives included in stakeholder interviewing processes.

Via these strategies, consultants actively "sculpted" clusters of organizations such that the resultant set of peer organizations for each client appeared uniquely similar to one another and distinct from those outside of the peer set (Zerubavel 1991; 1996). Consultants also actively constructed a group of stakeholders for each client with which it was uniquely important to speak. As consultants defined these distinct mental fields of similarity, difference, and priority, they simultaneously defined clients' competitive position within their peer group, began to surface the variables and options that they considered relevant for clients' future, and identified which of these options were most promising for clients. As the next sections will show, the variation consultants generated by creating unique sets of peers and stakeholders for each client

was carried forward as the strategic planning process wore on; these unique groups were key in the process by which consultants generated variation across their nonprofit clients.

Part 4: Charting Public Information and Building Buy-In: Mosaic Replication

In this section I describe the practices by which consultants conducted research *about* clients' peer groups, and the methods and rationales they used in conducting stakeholder interviews. Prior theory suggests that consultants, as drivers of rationalization in nonprofits, would surface consistent options for clients in the course of this research that aligned with rationalization--for example establishing formalized roles and rules in nonprofits (Hwang and Powell 2009). However, I show in this section that *within each client's unique peer group*, consultants' decisions to make their research efficient and accomplishable and the dual purpose they posited for stakeholder interviews pushed their recommendations toward replicating common nonprofit practices and power structures, rather than rationalizing nonprofits. I call this process of replication within variation *mosaic replication.*

Charting Public Information: The Peer Research Process

Once consultants selected clients' peer groups, they typically relied on publicly-available information to conduct research about peers--web searches and organizations' IRS Form 990s.[39] ArtsNow also subscribed to benchmarking datasets that the firm used to compare organizations on the basis of their environmental characteristics. Margaux from InsightSolutions explained this focus on available information: "Most of the research is publicly available information--you can

[39] Consultants also did sometimes call peer organizations to request information--this appeared to happen more frequently at ArtsNow than at InsightSolutions. In these conversations, consultants were limited to the information peer organization representatives decided to share.

also call the place or ask to speak to someone." She told me that she was worried that InsightSolutions' focus on publicly-available information was "a competition thing," but "really most of the things you need can be found online. […] you go into the peer research with clear questions--by the time you do this research we have a sense of [the client's] unique value-add, and what they are trying to do, as well as their finances." She continued that the goal of this research was to identify patterns and trends, rather than to go into depth on any single organization. In such research, InsightSolutions consultants did not believe that information beyond that which was publicly available was necessary; they also restricted their searching to such strategies to avoid any perception of competitive prying on behalf of their clients and keep their work cost-effective. Natasha from ArtsNow explained the information consultants hoped to gather through this research: "the organization and the facility, the geographical population, demographics." Other variables of interest included organizations' financial, governance, and staffing structures, business models, missions, programs, and outcomes. An InsightSolutions document used to explain peer research to a client highlighted similar variables, stating a goal to "get a sense of [peer organizations'] corporate structure, program and service mix, and revenue-generating activities."

I applied this strategy to conduct peer research for several InsightSolutions clients. In one case, Margaux told me she wanted me to find peer organizations' financial structure, organizational structure, program structure and components, goals, and outcomes. I began by Googling each peer organization and extracting as much information from the organization's website as possible. I then turned to a website called Guidestar to download each organization's IRS Form 990, from which I was able to pull general financial information. Finally, I checked to see whether each organization shared an annual report--they rarely did. In the course of doing

this research I came to understand that certain information was much easier to acquire than other types of information. Readily available was information about the organization's structure and financial performance, and its programs and mission. Outcomes, however, were difficult to access, except in the rare cases in which organizations shared evaluation or annual reports. In this paradigm, financial solvency often ended up standing in for mission success in identifying whether an organization's practices should be considered exemplary or to be avoided, replicating the popular but insufficient notion that the former equals the latter.

At InsightSolutions, the results of this research were put into Microsoft Word tables that delineated the relevant categories on which peer organizations were judged. Bowker and Star (1999) defined such classification systems as "spatial, temporal, or spatio-temporal segmentation[s] of the world […] a set of boxes into which things can be put to then do some kind of work" (10). Classification systems, they argued, abstract from the local in order to standardize. Indeed, InsightSolutions instructions for assembling peer charts focused on synthesizing and distilling information--"use charts to summarize and facilitate comparison of data and information. Use bullet points and numbered lists to summarize key findings and takeaways." Following these instructions, I produced the following chart for InsightSolutions' activist church client. The table has columns for location and physical context, mission, budget and profitability, a list of programs, management structure, and audience.

PEER SUMMARY

Location & Context	Mission	Budget & Profitability	Programs	Management	Audience & Needs
zations Engaged in Civic Life					
Manhattan, NYC Historic Jewish neighborhood Historic Building	Promotes individual and family development and participation in civic life within the context of Jewish values and American pluralism	Rev: $62.7M 33% contributed 68% program Exp: $61M Endow: $51M Profitable, but deficit for unrestricted funds	Educational School outreach Fitness classes and facilities Activities for kids and teens Senior programs & residence Fellowships Public talks and convening Arts and culture	Educational programming managed internally, social impact work conducted through partnerships	Multiple concentric circles Local Jewish community to global community via online, range of incomes. Needs: from basic services to intellectual stimulation and engagement
San Francisco, CA Border of affluent and poor neighborhoods	To create a radically inclusive, just and loving community mobilized to alleviate suffering and break the cycles of poverty and marginalization	Rev: At least $11M Some public subsidy, grants, donations Exp: Unknown Has experienced budget shortfalls	Family support services Activities for kids and teens Direct services Support groups Community action groups Open mics	Mostly managed internally, except health clinic and rental assistance program	Marginalized groups citywide and local, activists/allies Needs: from basic services and mental health care to participating in a diverse community and taking action on injustice
Washington, DC Downtown Historic Building	Celebrates unexpected places where Jewish and secular culture meet. Place for community to "plug in"	Rev: $2M 65% contributed 35% program Exp: $1.9M Profitable	Issue-focused social activity Meals program Public talks Arts and culture	Managed internally, except meal program	Local Jewish-identifying people, nonreligious educated public, especially 20s-30s Needs: intellectual stimulation and engagement

Illustration 5: An InsightSolutions Peer Chart

To highlight patterns and trends, the chart removes significant detail--for example, it abstracts the work of a $62 million organization to a single point in time, compressing its work into short, descriptive lists in which the content and context of programming cannot be captured. Specifically, the chart highlights the categories of information that are publicly available, zooming in on structure--financial, programmatic, managerial--as a key variable over which organizations have control, and highlights practices that are common across organizations.

Consultants' tables served to abstract further from local details, already attenuated via the peer research process, to streamline the information collected about peers into general statements about consistent categories. In doing so, these charts reinforced a focus on mission, management and programmatic structure, financial structure, profitability, and audience or geography as the primary axes of comparison between peers. An ArtsNow consultant explained this approach:

> Something that we've done a lot more in recent years is shifted from learning everything we possibly can about three organizations, to learning thematic things about 12, so that you can see them on a granular level and say, "Oh, I really like the way they do that one specific program, and it compares to our program. And then this other organization, I love how they handle their financials."

Consultants focused on breadth, rather than depth--providing a shallow review of several organizations on specified parameters, rather than a deep dive on a few. As a result, consultants painted clients' peer groups with a broad brush, zooming in on a small number of variables--namely mission, programmatic and managerial structure, and financial performance--over which clients had control, and identifying focal audience as an additional axis of variation between peers. Within these variables, peer charts highlighted patterns and trends within peer groups.

Best Practices as Common Practices

Consultants used the results of peer research to define a set of best practices for client organizations to consider emulating. The definition of this concept was not fixed-- when I asked an InsightSolutions staff member what "best practice" meant, she advised me to consult the client lead and said she could only offer her opinion, that "best practices are when you look at a cross-section of peers, this practice appears to be working for multiple peers, and they have explained why they adopted it." "Best practices," in consultant work, tended to mean common practices, in which "working for" as mentioned earlier, tended to mean that the organization

employing the practice was in the black financially. InsightSolutions' instructions sheet for peer research articulated a more general need to provide "evidence that something is considered a best practice--who says and why do we believe them? Awards, recognition, major funding, etc." Best practices in this formulation had received some prominence or social legitimacy through visibility, awards, or funder investment. ArtsNow articulated a similar definition for "best practice"-- as Isabel put it in a public presentation for a civic agency in Canada, "we are literally using [examples of other organizations] to trigger your imagination. It's not about architecture, it's not about operating model. [They are meant] to shine a light on best practices--to be thematically specific, and spark your imagination in an aspirational way." The results of peer research were used to inspire clients, but the process of this research functioned to limit clients' aspirational thinking to a set of broad structural and programmatic options defined by the practices that were present among their reference set of peers.

A consultant at ArtsNow crystalized the conflation of "best practices" with common practices in an interview over Zoom. "How does this idea that you want to pursue compare to what other people do? And [in] the universe that we're comparing you to, does it pass the smell check, or logic test?" The consultant drew a scatterplot on a small whiteboard behind her video screen, creating a tight cluster of dots around a central point and then placing a single dot far to the upper right of the cluster. "When you look at this spider plot, of how all the performing arts are doing it, and then you put what you think you want to do on that scatter plot, and it's all the way over here and everyone else is over here, is it really the right decision? And what can you learn from all these people about why they're all concentrated here?" She gestured at the dot to the far right of the plot, then the cluster of dots. She articulated a "logic test" as whether the client's aspirational choices aligned with the modal practice of peer organizations, suggesting

that atypical choices were likely misguided. She continued, explaining the scatter plot exercise as representative of ArtsNow's peer research process: "We do a really good job of, number one, picking the universe to which we compare our clients [and] then saying, "Here's the world in which you operate, and here's the data that supports or tells you no, you shouldn't do that." As this anecdote illustrates, best practices generated via consultants' peer research could often be defined as *common* practices.

By directing client nonprofits toward these common practices--in terms of programmatic and managerial structure, mission, and audience--the options consultants generated reproduced the existing practices that were present within each client's unique peer set, rather than spreading new ideas across nonprofits.[40] The results of a survey ArtsNow conducted of former clients crystalized this inclination toward existing practices. As one respondent cautioned ArtsNow, "be sure to present future thinking rather than what has worked in the past." A former WorldAdvisors consultant suggested in an interview that consultants' inclination toward common as opposed to risky or innovative practices was baked into the consulting model. As a client services organization, he said, "consultants need gold-plated materials" and "use a lot of caveats--potentially, maybe […] because you don't want to hurt your credibility." The dependence of consultants on their reputation for continued work, he suggested, caused a culture of risk-aversion in WorldAdvisors: "[this caused] risk aversion in what we recommended people invest in." While his perspective should perhaps be taken with a grain of salt, he suggested that the consulting model reinforced an inclination toward safer, more common practices, as opposed to more risky or innovative ones.

[40] This is not to say that consultants *never* innovated; rather, my intention is to point out the ways in which consultants' work processes pushed them toward replicating existing practices. Correspondingly, consultant-led innovation often entailed introducing clients to ideas that were new to the client but not to *the peer group*, given that consultants produced unique groups of close peers and analogs for each client.

Replication within Variation in Peer Research

While consultants operationalized best practices as common practices across clients, different peer sets contained different best practices; this variation yielded different options for clients with distinct peer sets. For example, for InsightSolutions' health and social services client, Ines and I defined a peer set that included a local hospital, a multiservice human service provider, a few private homecare firms, and an art center; later in the process we recommended options for the client that mirrored these peers--become a funder, as the art center had done, merge with another organization, in which the multiservice human service provider was interested, or change the organization's payor mix to match the private homecare firms' business models. In contrast, for InsightSolutions' sports youth development client, a set of youth development-through-sports-focused peers yielded options that aligned with these peers' structures--create a separate program arm for girls, expand to multiple sites across the city, or open the client's own facility. While, given the differences between these clients, we would not expect InsightSolutions to offer them identical options, in both cases consultants' recommended options for programmatic structure derived from the existing practices of clients' peers, and the options were noticeably shaped by the specific practices present in each unique peer group.

In sum, the process by which consultants conducted research about the unique peer groups they defined for each client organization promoted replicating existing practices within clients' peer groups, rather than disseminating new ideas across nonprofit clients. Consultants particularly foregrounded mission and financial, programmatic, and managerial structure as drivers of client and peer organization similarity and key variables over which organizations had control, with audience as an additional axis of variation. Consultants then used the missions and

structural characteristics of peer organizations to define a set of best practices--usually common practices defined as successful because the organization using them was solvent--which they used to limit and channel client aspirations within the boundaries of the client's peer set. However, this inclination toward replicating existing practices did not create homogeneity in the best practices or options for programmatic structure consultants identified for clients. Because each client's peer group was unique, each set of best practices and corresponding options was also unique--the options consultants presented to clients were shaped by the specific set of practices that was present in each client's peer group.

Building Buy-in Through Stakeholder Interviews

We can observe a similar phenomenon in the case of stakeholder interviews. Like in peer research, consultants' strategies for conducting stakeholder interviews--specifically the dual purpose they posited for these interviews--led them to replicate existing power structures in the nonprofit sector. Like the case of peer research, this replication paradoxically did not have a homogenizing effect on nonprofit practice, instead yielding variation.

As I demonstrated earlier in this chapter, consultants used their and their clients' networks to determine the set of individuals with which they spoke during stakeholder interviews. Generally client representatives were tasked with generating the initial list of candidates for interviews. However, to direct clients' list-generation, consultants typically provided clients with a set of suggested categories of stakeholders to include. As the following InsightSolutions guideline document shows, this list typically included board members, senior staff, funders, partner organizations, and relevant experts.

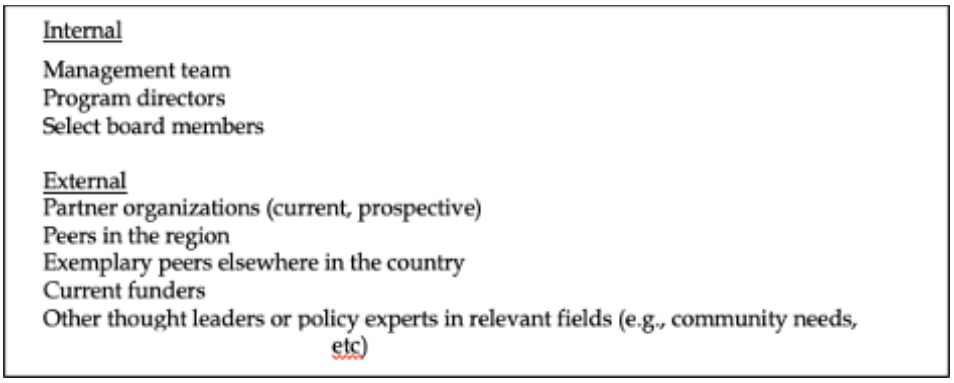


Illustration 6: Suggested Stakeholders

Frank, a partner in a small firm, described prioritizing stakeholders like senior leadership and donors in terms of these actors' power over organizations. He explained that in his work with clients he used a particular tool, which he called a "stakeholder inventory," to help clients understand "who they're really serving and the degree of influence people have on them." Donors, he explained, "have a tremendous degree of influence and you have no control [over them]." Due to donors' influence, Frank suggested that clients involve donors in their strategic planning from the beginning. In his words, "I encourage my clients to bring one of their donors [onto their strategy teams]." He explained that his clients often expressed fear at this notion, suggesting that their donors wouldn't like to "see their dirty laundry." He corrected them: "That is exactly right and that's just what you want. […If my clients] don't do that, they develop their strategies in isolation. […] they haven't bothered to ask whether or not a donor might in fact like the direction of the strategy when they do the big reveal." He argued that involving donors in nonprofits' strategic planning processes allowed organizations to ensure that these individuals would support their future plans.[41]

[41] I discuss this practice at length in Chapter 7.

InsightSolutions had a similar rationale for prioritizing powerful stakeholders. During InsightSolutions' Historic Park project, Margaux disagreed with Angela, a sole proprietor communications consultant involved in the project, because Angela wanted to cut a group of donors out of the client's stakeholder interview list. Angela argued that "we shouldn't talk to donors if they aren't going to provide new information." Margaux counter-argued that donors are "good to engage" from a "purely donor-engagement perspective [… you talk to them] so that they feel talked to" and are thus invested in the strategic planning process. As these examples illustrate, engaging stakeholders via interviews or other strategies--particularly individuals with power over organizations--did not solely serve to gather information. Rather, such engagement helped reinforce nonprofits' relationships with people who had power over their organizations, and secure these individuals' early buy-in on organizational plans.

Sometimes missing from stakeholder interview lists were lower-level staff, clients, and audience members, stated otherwise people *over which client organizations had power*. If such voices were included, consultants often did so in highly structured ways, such as online surveys of members or by inviting staff to comment on an already-set strategic direction. Notably, these strategies were promoted by clients as often as they were by consultants. For example, at one point during my fieldwork Arthur from ArtsNow helped a large performing arts center client prepare for an all-staff meeting in which staff members would have the opportunity to share their opinions on the organization's strategic direction, which had already been chosen by the leadership. As Arthur put it, ArtsNow was tasked with helping the client design a session that "engages the staff without promising them any outcomes." On the phone with the client, Arthur cautioned that it was important that the executive director made it clear to staff that they "will be reacting to the long-range plan, but not editing it." The client confirmed, telling Arthur that he

valued staff input "as long as it's in line with what we've been doing." Arthur then guided the client to design a session to do just this--engage staff and build their excitement about the strategic plan, without challenging it.

In another instance, during InsightSolutions' project for Historic Park, the consultant team declined to engage members of a particular community group both because the client did not like the group's behavior and because the group had many factions and would be hard to pin down. As one of Historic Park's client representatives put it, "when we wrote the RFP we weren't expecting significant community involvement because there was not enough time […] community groups can become disruptive [and] we knew we didn't have enough resources to address it now." This community group had a very different idea for how the park should be used, and may have influenced the client's options had it been included in the planning process. Across these cases, because stakeholder interviews focused on reinforcing clients' relationships and building buy-in for future directions in addition to generating information, consultants deprioritized audience groups and prioritized individuals with power *over* client organizations, those who might have direct influence over the success of client organizations' future plans.

Correspondingly, InsightSolutions evaluated clients on their ability to generate stakeholder lists. As Sara explained, the "process of generating this list is very telling--are they heavily relying on one type of stakeholder? Is it hard for them to come up with the list or do they take a long time? Are there any big 'Nos' when it comes to talking to particular stakeholders?" Those things, she said, could have something to do with "their resources, their relationships, the degree to which they understand the purpose of the exercise." InsightSolutions evaluated the quality of clients' network and relationships with powerful stakeholders via the interpersonal process of generating the stakeholder list.

Once the client generated the initial list of candidates for stakeholder interviews, the suitability of each person was typically worked out through conversation within the consulting team, and between consultants and clients. One sunny afternoon at InsightSolutions, Ines, Margaux and I met to discuss stakeholder interviews for InsightSolutions' sports youth development client. The client had proposed more interviews than were accounted for in the consulting budget, and the team had to decide what to do. Sitting around a small table in a conference room with brightly-colored furniture, we reviewed the list of people the client suggested, one by one. Margaux expressed that she thought that two of the many funders suggested by the client were not suitable for interviews because of a lack of overlap in funding priorities with the client's programs. Ines gently disagreed with Margaux, reminding her that these interviews were "about what we learn and also about advancing their relationships." Margaux and Ines agreed, however, that these conversations "aren't for people who know nothing about the client--we want baseline familiarity, willingness to help out, interest in what we do." Within groups of powerful stakeholders (such as funders), consultants prioritized those individuals who had some degree of pre-existing familiarity with their client or relevance to the client's mission and goals, to support consultants' efforts to build buy-in among such stakeholders.[42]

Relatedly, during my fieldwork InsightSolutions members sometimes reacted negatively when senior leadership could not be reached for a project. As Sara articulated, practicing with Ines for a client meeting, "it has concerned us the whole time that there is no leadership [at the client organization]." She continued, explaining that she and Ines were uncomfortable with the preference of the client (a senior manager) that the team wait until the conclusion of the project

[42] I discuss this strategy's implications in terms of funder involvement in consulting work in Chapter 7.

to talk with the client organization's new executive director. "We advise against waiting a year to approach him." Sara and Ines argued that it was critical to include the executive from the beginning of the project, to ensure his buy-in to the result. Indeed, InsightSolutions members questioned the fact that the client's decision-making group for the project lacked senior leadership and was primarily made up of staff. As Jim put it, "This is supposed to be a flagship program and the committee was mostly staff." He suggested that the lack of senior organizational leaders on the committee suggested that the project was "not important to the strategic direction of the institution." A failure to include senior organizational leadership as decision-makers in the consulting process caused Jim to negatively judge the project and its importance to the client institution.

Consultants' commitment, then, to securing buy-in from stakeholders with power over their client nonprofits, led them to prioritize these individuals--senior program staff, board members, funders, and executive directors of other organizations--during stakeholder interview processes, thus reproducing a familiar power relationship in the nonprofit sector. The opinions of those with power *over* organizations were often prioritized at the expense of those *over which* organizations had power, because the latter perspectives were perceived as both harder to capture and less immediately consequential to success.

Redefining Normal: Rigid Nonprofit Budgets

The sizes and limitations of nonprofits' budgets for strategic planning intensified consultants' prioritization of people with power over their clients, as the extent of the stakeholder interview process was meaningfully shaped by money. As Susan told me, if a particular client had enough money, "we can do 20 or 30 interviews. We will also do some focus groups. We also

use an electronic survey tool, if that's appropriate." Conversely, in my observation, consultants often cut the number of interviews when clients had less money for the project. As Susannah and Natasha at ArtsNow put it, when a project budget was small, they "whittled down the number of interviews." In this context, firms that worked with nonprofits with larger consulting budgets conducted more stakeholder interviews, which allowed them to include more lower-level staff and audience members.[43] Judy, a consultant in a medium-sized firm, explained this to me in an interview:

> Coming from an academic background, I was very much in the space of take the time that you need, for the most part, to get the work done. [But the] budget constraints of working a lot with nonprofits is they have a very set budget of, this is the amount that we can pay you, these are the goals that we have for your evaluation of our work. It's really sitting down and working with them up front to say what are the most important pieces here, what should we absolutely hit, what is a maybe and what is sort of the lowest priority? […] Qualitative research just takes longer. We've had organizations that have come in and said, "We would love you to do this survey and also this many interviews." The budget just doesn't work out to do interviews, which is very frustrating at times. A lot of the quantitative-heavy focus is often driven by budgets.

Nonprofits' rigid budgets, Judy argued, resulted in a reduction in the number of perspectives included in client processes and at times a default to quantitative data, which was less costly to consulting firms.[44] Susannah from ArtsNow echoed this point during an interview. "The number of interviews depends on the fee. And community surveys are always great […but] those are time-intensive, and they can be expensive." In this context, consultants were incentivized to prioritize "the most important" perspectives, leading, as the previous section showed, to a focus on actors with control over organizations, at the expense of audience voice.

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[43] Smaller consulting firms also sometimes included representatives of audience groups in stakeholder interviews, but whether this was possible again depended on money--firms usually only did so for clients with sufficiently large consulting budgets to allow for a large number of interviews.

[44] However, even as they adjusted their research processes according to clients' available resources, consultants also went to great lengths to *accommodate* nonprofits' budgets. I discuss this in Chapter 6.

Quick Synthesis

In pursuit of efficiency in their planning processes, consultants also moved quickly to synthesize and generalize from interview results. As Heidi, an evaluation consultant at a large firm, recalled, "in one of my first projects, we committed to 20 interviews and after 9, my colleague said we are done, we got it." She explained that her "strategy colleagues eyeball stuff," suggesting that consultants were incentivized to synthesize as quickly as possible during stakeholder interviewing to make efficient use of resources. Natalia from FocusImpact echoed this tendency. "I personally think that sometimes we get too tied to the data too early--we will hear a couple things and be like "oh that must be where they are headed," and we are not open enough to hearing something different." In the context of quick synthesis, consultants ran the risk of jumping to conclusions. Indeed, InsightSolutions sometimes framed the decision to stop conducting interviews "as a finding." In the case of an environmental and food access client, many potential interviewees declined to participate. Rather than adding additional stakeholders to reach the number of conversations specified in the contract, Zelda directed me to hold off--she asserted that the fact that many people declined meant that the organization is not a top priority for stakeholders, "and that's an important finding."

A senior foundation leader explained her take on this situation in conversation with me. Consulting firms, she argued, have redefined the normal for the process and extent of research (such as the expected number of interviews) in order to ensure firm profitability and fit the consulting business model. The "saturation" claimed by Heidi's colleagues--the perception that additional interviews would yield repetition of the same insight--may be reached particularly quickly given that the small number of affordable interviews reinforced a focus on individuals that shared a structural position with regard to nonprofits--people with power over clients. This,

the foundation leader claimed, has caused nonprofits to "redefine the goal posts" of acceptable research, a process quietly orchestrated by consulting firms to fit their business models.[45]

Variation within Replication in Stakeholder Interviews

As the last sections showed, consultants' goal to build buy-in to clients' plans combined with client preferences to lead consultants to default to powerful individuals for inclusion in stakeholder interviews, and correspondingly de-prioritize audience voices. Consultants' budget-driven incentives to restrict the number of interviews included in the stakeholder interviewing process reinforced this tendency to prioritize people with power over client nonprofits. Furthermore, the impulse to synthesize quickly led to a temptation to take these perspectives for granted, and assume that the opinions of the powerful represented the whole story. Taken together, these dynamics led consultants to replicate status-quo power relationships in the nonprofit sector in which the perspectives of people with power over organizations were prioritized over users.

Recall that in addition to building buy-in for clients' plans, consultants used stakeholder interviews to inform their assessments of clients' field positions and evaluate the options for programmatic structure identified through peer research. While consultants replicated existing power structures through stakeholder interviews, this dynamic did not contribute to homogeneity in the options consultants offered clients or which options were identified as optimal. While people selected for stakeholder interviews were generally in similar structural positions vis a vis client nonprofits, the particular perspectives present in each client's unique stakeholder group

[45] In the next chapter, I discuss how this practice fit into subsequent steps in the strategic planning process.

were (perhaps obviously) unique. As such, unique stakeholder groups yielded unique options for clients, and variation in which options were viewed as optimal.

As an example, one day in the InsightSolutions office Margaux griped to me about the stakeholder interview process for one of her clients. She explained that the "project really suffered because [the executive director] really likes higher up people, so all the connections, all the people he had us talking to were the big whoopdie do leaders of Philadelphia." The client's preference for prominent individuals led InsightSolutions to conduct a significant number of such interviews. This fact, Margaux continued, had a material effect on the feedback InsightSolutions got about the client's ideas. "[Those people] are naturally territorial about what they do, and they were not natural collaborators or partners in thinking." She explained that the particular leaders with whom the client directed InsightSolutions to speak were overly critical of the client's ideas because they were focused on ensuring that InsightSolutions' client did not compete with their work. Margaux explained the result of this situation. "I had many, many conversations with people who were like, 'someone already does that' or 'I already do that' (what the client was proposing). I think that's a function of who [the executive director] knows and chose for us to talk to." As a result, InsightSolutions was led to seriously question the client's ideas, and to recommend that the organization consider moving in a different direction with its future plans.

As this vignette shows, the particular individuals with whom consultants conducted stakeholder interviews affected the direction of clients' strategic plans, foreclosing certain options and opening others. Clients' preferences and the limitations of clients' and consultants' networks combined to create a unique stakeholder group for each client. Given these unique groups, even though consultants uniformly prioritized powerful perspectives for stakeholder

interviews, the interview process contributed to variation, not homogeneity, in the options for programmatic structure that consultants presented to clients.

Recap: Mosaic Replication

In summary, rather than surfacing consistent options in the course of peer and stakeholder research that rationalized nonprofits or diffused new ideas for management strategy and organizational structure across client organizations, consultants' research processes promoted the replication of existing practices and power structures in the nonprofit sector. By using publicly-available data and synthesizing information into Microsoft Word charts during peer research, consultants defined best practices as common practices, thus directing clients toward shared practices within each client's unique peer group. Due to the characteristics of consultants' research processes, mission and financial, managerial, and programmatic structure were particularly visible peer practices, which led consultants to frame these as key variables over which organizations had control.

Additionally, by focusing on building buy-in among key stakeholders via stakeholder interview processes, consultants prioritized the perspectives of people with power *over* client organizations, correspondingly deprioritizing the voices of those over which organizations had power. In doing so, consultants replicated common power dynamics in the nonprofit sector in which the perspectives of elite actors--senior staff, funders, and experts--were prioritized over those of lower-level staff and users.

However, despite consultants' portrayal in organizational theory as agents of inter-organizational diffusion and homogeneity (DiMaggio and Powell 1983:152), the replication of existing practices that consultants promoted through their research processes did not yield

uniformity in the options for programmatic structure consultants presented to clients or those they framed as optimal. Crucially, consultant-driven replication of existing practices occurred *within* the varied peer and stakeholder groups that consultants produced for clients, resulting in a phenomenon I call *mosaic replication*. Each client's peer group, made up of a distinct set of close peers and analogs, defined a different set of structural and mission-oriented practices as common. These peer group-specific common practices then informed the options that consultants generated and presented to clients,[46] resulting in different options for different clients.

For example, during my fieldwork both InsightSolutions and ArtsNow worked with large religious institutions that wanted to reimagine how to use their historic spaces. While InsightSolutions defined a diffuse peer set for its activist church client that included other large activist churches, local congregations with large buildings, a nonprofit pub, and a women's giving circle, ArtsNow closely defined a theological seminary's peer set to primarily include other religious institutions. Both firms later proposed options for their client derived from these peer sets. While ArtsNow consultants offered fairly typical options that aligned with the religious institution peers they identified for their client, including maintaining existing building usage, using the building for religious gatherings, hosting local performing arts shows and conferences, or offering private rentals, InsightSolutions offered broader options that represented the synthesized commonalities across the client's diffuse peer set--offer fun activities that contribute to social change, or create a program where cohorts of participants take action on particular social topics. While these options were also importantly influenced by the nature of clients'

[46] It is important to note that these options were not static--in addition to deriving from the results of peer and stakeholder interviews, both peer groups and the options to which they gave rise were shaped by the nature of the problems the client brought to the consultant. After consultants presented an initial set of options to a client, these options were also further modified, manipulated, combined and edited through extensive discussion within consulting teams and between consultants and clients. I discuss this process in the following chapter.

problems, interests, and aspirations, the differences in the options InsightSolutions and ArtsNow offered their clients could be linked to the different characteristics of the peer sets consultants identified. The implication is that generalist firms potentially produced more variation in options than specialist firms, due to the more disparate nature of the peer groups generalists produced. The former transferred ideas between nonprofits of different types, meaning that clients might be less familiar with peer set-derived ideas, creating potential opportunities for cross-subfield pollination, while the latter potentially reinforced more consistent practices by drawing peers from within their subfield of focus.[47]

Consultants' research practices thus promoted the replication of existing characteristics *within* each client's peer group, but not *between* clients or peer groups--unless, of course, clients were similar enough to have similar peer groups.[48] In this way, consultants' practices promoted *mosaic replication*--bubbles of homogeneity within a heterogeneous field--while simultaneously producing variation across the wider nonprofit sector. Rather than acting as homogenizers of nonprofit practice, consultants synthesized unique peer and stakeholder groups for each client organization and promoted replicating common practices *within* each peer group, resulting in *mosaic replication*--a nonprofit sector made up of an irregular mosaic of internally consistent groups of nonprofits.

[47] However, boutique generalist consultants often indicated that due to the collaborative nature of their strategic planning processes, clients frequently perceived consultant-generated options and recommendations to be the opposite of novel--clients felt that consultants' conclusions reflected information clients already had. I discuss this phenomenon at length in Chapter 7.

[48] For example, InsightSolutions generated similar options for two clients that were both historic parks. The consulting team chose similar peer groups for each site made up of historic parks, cemeteries, and architectural sites, later offering similar options linked to three possible foci represented within these peer groups--a focus on nature, a focus on history, or a focus on recreation and operations.

Part 5: Ontological Gerrymandering and Mosaic Rationalization

Just as consultants' research practices produced mosaic replication, their strategies to conduct peer and stakeholder research also pushed nonprofits toward particular variables on which to focus their efforts. This can be understood as a process of ontological gerrymandering (Woolgar and Pawluch 1985), in which consultants defined the variables over which client nonprofits had control and proceeded to redefine problems as stemming from these variables, while backgrounding other elements as out of organizations' control.[49] Via peer and stakeholder research, consultants framed nonprofits as able to control their mission and formal organizational structure. Client nonprofits also had control over their organizational networks and the executive that led their organizations. These characteristics formed the basis of problems articulated through and the options crafted for clients in the consulting process. Concurrently, consultants framed other variables as *out* of client organizations' control--namely, the environment within which clients operated.

As this chapter shows, consultants' focus on mission, structure, networks, and leadership emerged from their work processes. However, as I will argue, some of these foci also echo Hwang and Powell's (2009) definition of rationalization as the imposition of clear identities and formalized roles and rules on nonprofits. But just as consultants spread these rationalizing foci, the unique peer and stakeholder groups they used to ground their research processes again limited consultants' rationalizing power--unique peers surfaced unique formal organizational structures. Through this process consultants promoted *mosaic rationalization*, rather than homogenizing nonprofit practice.

[49] Note that this definition of gerrymandering lacks the negative connotation that is typically assumed to be associated with the term.

Formal Organizational Structure as Key and Culprit

Consultants' focus on formal organizational structure (for example organizational charts, codified program models, and governance committees) as a primary element over which organizations had control derived, as I showed earlier, from the process of peer research, in which consultants' use of publicly-available information and synthesis of information into Microsoft Word charts made managerial, programmatic, and financial structure one of the most visible variables on which to compare organizations. Consultants then went on to treat formal organizational structure as key to nonprofit success, correspondingly promoting formal structure throughout their work with clients. Frank, a partner at a small firm, explained the centrality of formal structure during an interview--"your job as a CEO is to create an aligned organizational structure that actually will enable all of you[r staff] to work together to deliver a result." He articulated the job of the leader as creating an adequate organizational structure to enable efficient coordination, unwittingly aligning with Carnegie School notions of the critical role of structure in enabling decision-making and coordination in organizations (Simon [1947] 1997).

At InsightSolutions, Margaux told me that for her sports youth development client, a project billed as an expansion plan had become a program and managerial structure plan. She later explained that InsightSolutions often ended up focusing on program codification before, or in place of, other planning work--structural and programmatic clarity, she told me, was necessary pre-work before program expansion or change. FocusImpact reinforced the centrality of formal organizational structure to nonprofit success by including a compulsory structure-focused goal in all strategic plans, called "The Organizational Goal." As Marion explained to me, "we structure our plans where the decision is first around vision, then it's around mission, then it's around the impact you want to have in the next three to five years, and that's how you need to build your

organization in order to achieve those goals." In FocusImpact's framing, organizational success in goal attainment was integrally tied to managerial structure.

Just as formal organizational structure affected whether organizations achieved their goals, it also limited organizations' chosen activities. InsightSolutions regularly advocated that clients make decisions based on their formal structure. For example, in an all-staff meeting at InsightSolutions, the group discussed difficulties working with university clients. Margaux wondered aloud. "[Should a client attempt to] do something when [they're] not built to do it? Our clients ask us to help them do that a lot." Sara responded quickly: "Don't." Samuel echoed: "maybe that's right. If you're not built to do it, part of our job is to tell them that." On another day, Ines reinforced the primacy of structure in a meeting about writing a final client report. "I get sucked into the complexity, but it's really all about X, Y, Z--program, financial, and organizational structure."[50]

Correspondingly, throughout the consulting process, consultants explained many client-articulated problems as related to structure--either *problems* with existing organizational structures, or a *lack of* adequate formal structure. In both cases, the solution entailed adding additional role and responsibility structures to the organization. This perspective was exemplified in a series of encounters at InsightSolutions with a public space project, on which I worked with Sara and Jim. One rainy day, during a meeting with Sara and I, Jim explained his assessment of

[50] In some ways, this parallels the consulting process itself, in which consultants used frameworks and structured inquiry processes to impose order upon seemingly unruly client problems. An InsightSolutions staff member explained "creating structure" to be one of her favorite parts of her job: "I like the notion of creating [a clear] process out of something that feels really ambiguous and hairy to somebody else. I love coming in and being like, 'All we have to do is answer this set of questions and then we'll have your answer.' So that notion of creating structure is really fun for me." Imposing a structured inquiry process on unruly organizations as a key consulting activity echoes consultants' focus on individual clients' organizational structures—it also recalls consultants' use of interpretive frameworks, as I discuss in the next chapter.

the client board members' problems and optimal solutions. "Their difficulties are normal organizational development. This is a pivotal time for structures, and tension [in the organization] is coming from a lack of structures and roles." He proposed recommending that the client organization add additional formal structure in its work, including board committees and clear roles and responsibilities. Sara nodded, but did not believe that structure alone would fix the client's problem. "They need more tactical advice." Jim disagreed. "I feel that their structure is the reason [they are experiencing] conflict, though I might be a hammer seeing everything as a nail. […] They need to stay out of each other's lanes, and figure out how to work collaboratively." Sara remained unconvinced. "What will prevent the same problems from arising when things get hard?" Jim reiterated that managerial structure would routinize and neutralize any problems that arose--"the problems will be managed in committees, and then the committee will recommend a solution to the full board." In this vignette, Jim and Sara debated the relative power of structure in resolving intra-organizational conflict. Jim, the proponent of structure as the cause and solution to the client's problems, won the debate.

This situation played out the next week at the client board meeting, which took place in the lobby of an expensive-looking apartment building. Jim and I entered and sat down, and Jim introduced me. After a welcome and some niceties, Jim walked through his PowerPoint presentation, reviewing the mixed results of a board survey before turning to his recommendations to add additional formal structures and roles and responsibilities to the board. Jim smiled. "I tend to look at structure not personalities […] You are a classic operating board, and now have the opportunity to move to more structure and be more effective." He looked around the room, counseling board members that the organization needed to implement and then defer to formal structures and processes for making decisions in order to improve organizational

effectiveness. Andy, a board member, disagreed. “Not at the expense of getting things done.” Jim responded gently. “If you don’t have the structure, it’s not the time to get it done.” Jim used structure as a panacea for organizational problems--structure mitigated interpersonal tensions, directed organizational efforts, and increased effectiveness. Mary, an independent consultant who previously worked for FocusImpact, made this point clearly in an interview. “Some consultants,” she told me, “are like therapists. They say Bob and Sue don't get along, so we should work on their relationship.” In contrast, she told me, “I assume Bob and Sue can’t stand each other, and figure out how to structure the organization so this doesn't cause big problems.”

Relatedly, at other points consultants attributed client issues to common structural problems across the nonprofit sector. As an InsightSolutions staff member explained, talking about a particular client, “I remember some interesting and challenging dynamics between the ED and Board Chair. I think naturally there's always going to be some sort of tension between those two roles.” Client problems and behavior were normalized by consultants through reference to structural positions in the nonprofit sector, to redirect blame for client problems from the clients or consultants to the field itself. Problems were interpreted as occurring due to common structural misalignments, rendering clients similar and problems unsurprising. Critically, consultants defined such structural problems as fixable through the consulting process, through the addition of more or better formal structural elements.

In sum, consultants’ peer research process specifically called attention to formal organizational structure as a key variable over which organizations had control. Consultants then brought this focus on organizational structure with them through strategic planning processes, attributing client problems to inadequate structure and promoting, through the course of their

work, additional managerial structures and codified roles to align client nonprofits with the structural elements that were common among each client's peer group.

The Networked Organization

Just as consultants' peer research process yielded a focus on formal organizational structure, organizational networks were central to identifying clients' peers and stakeholders. Correspondingly, the process of working with consultants was part and parcel of building and strengthening these networks. Margaux explained this to me during an interview, specifically highlighting Jim's work.

> InsightSolutions is a connector. I've seen Jim so many times saying, "You know, this is something you should really talk to the Dean of the College of Education about. You guys should talk." Or, "you're doing this thing very similarly to another client across town. I think you guys should talk." Jim is always connecting people. […] I feel like Jim has a natural inclination to do that […] He connects people and anybody he can.

InsightSolutions saw a connector role as integral to its work, led by Jim, whose deep networks across the city facilitated this role.

As part of promoting inter-nonprofit connections, consultants advocated for organizational partnerships. As a former midlevel staff member at a large consulting firm explained, "we were pushing cross-sector partnerships. Often the levers that will affect a social outcome are affected by many sectoral dynamics. So if you want to impact juvenile justice you have to think not only social work but also criminal justice. About partnerships that are necessary to do that." FocusImpact took the focus on partnerships further, explaining collaboration as a shared firm value. As one staff member explained,

> I think FocusImpact, because of our ecosystem approach, we value collaboration […]. That enables an organization to navigate its ecosystem more effectively, or to […] increase its impact in the ecosystem. Acknowledging its unique role within the ecosystem and then partnering or collaborating accordingly. They recognize that they can't do

> everything, but that many organizations and people have a shared vision. I think […] we might err on the side of collaborating for collaboration's sake.

At FocusImpact, a focus on organizational networks and collaboration was tied to organizations' recognition that they could not do everything. As mid-career consultant Emily explained to a client in another state, "you want to be inclusive, but also, what's your unique position--what are you best prepared to provide, and where would be better to partner?" FocusImpact framed collaboration as an imperative to better accomplish organizational visions, reinforcing the emphasis consultants placed on networks in nonprofit success. Indeed, at FocusImpact, partnering was built into every strategic plan as a component of organizations' vision statements. FocusImpact described organizations' visions as "the change they want to see in the world," and their mission as their role in that vision, with the rest of the vision to be achieved via partnerships with other organizations.

To summarize, consultants' use of client and consultant networks to generate client peers and stakeholders was then carried through strategic planning processes via an emphasis on partnerships and collaboration. Just as consultants relied on their and client networks to generate clients' unique peer and stakeholder groups, they built and reinforced the importance of these organizational networks throughout their relationships with clients, defining organizational networks as a key variable over which nonprofits had control.

Leaders as Key Figures

The final way in which consultants' work processes pushed organizations to focus on certain variables concerned organizational leadership. Clients' leaders were critical to the progress and success of consulting work--most sought after were decisive leaders who were willing to take responsibility for their organizations and "put a stake in the ground" about the

organization's direction. Consultants' preference for decisive leaders was inextricably related to the fact that it was these same leaders that hired and worked with consultants the majority of the time. This led to slippage between the characteristics of effective leaders and effective clients, as decisiveness on the part of leaders of client organizations allowed consultant processes to move forward. Isabel at ArtsNow exemplified this while driving with me on the way to a client site. She told me that she was stressed about the project "because there is no one pushing a particular option." She explained that the project lacked a leader with a vision for the project--"it could be anything." Isabel explained that ArtsNow needed the client's senior leadership to make a decision about the direction of the project, which she called putting "a stake in the ground, that has to be with upper leadership." Jim explained this perspective to me in an interview.

> [A good leader] can view us as a thought partner and not a workhorse. Not, "Well, you're the consultant. Tell us what to do." We don't have all the answers. We don't have any of the answers. But you as the executive know what you see, and have a sense of where you'd like this to go, or what you want to accomplish. And we are gonna get information, organize it and facilitate a discussion in a way that together we can figure this out.

Jim highlighted that decisive leaders allowed InsightSolutions to "not have all the answers," and provided sufficient guidance to allow consultants to succeed. He gave an example of someone he thought was a particularly good leader, saying that when she was hired, she immediately had an inclination of the direction the organization should go. "She's a great client," Jim told me. "She's made some observations. She's given us permission to look at things differently. And we don't have to come in there with all of the answers." The leader's inclination to guide the planning process made the consultants' job easier by limiting the universe of potential options.[51]

Another senior InsightSolutions staff member spoke about this at length, telling me she cannot stand "leaders of organizations who don't have enough conviction to make decisions."

[51] In Chapter 7, I describe how this preference for decisive leadership fit into boutique firms' collaborative approaches to strategic planning.

She continued. “From a business standpoint, not having a motivated client means a project takes 8 months, not four, but more or equally important, it’s what it means for the organization. They need us to help--so what are tools or strategies to create urgency without panic?” Her comments clearly conflated good clients with good leaders--she pointed out that a lack of decisive leadership caused business problems for InsightSolutions, suggesting simultaneously that decisive leaders were best equipped to guide their organizations through troubled times. At FocusImpact, staff similarly saw client leadership as key to their work. A staff member told me that “strong leadership” was necessary to translate the results of the firm’s assessment tool into organizational change. “We've seen [this] borne out anecdotally in a lot of the work that we do. If you don't have really strong leadership in place who's committed to capacity building, the chance that anything is gonna really happen is pretty low.” The consultant argued for the critical importance of decisive leadership in ensuring that consultant recommendations were acted upon.

So important was the quality of client organizational leadership that consultants saw the leader’s personality as one of the largest contingencies they faced when accepting work. During a meeting with Margaux and me, Jim replayed a case of a recent client. InsightSolutions was hired “by smart people, the staff, and they warned me that [the executive] is a bit of a terror, everyone kind of hates her.” The team had “tons of cathartic meetings” with staff, and then “meetings with [the executive] were awful. She hated me, and fired us soon thereafter. We were cannon fodder between the staff and the ED.” He told me that this happened with some frequency. And the issue was, “as a business, do you turn down a $35K gig? Do you turn it down on the chance that the ED is crazy?” Decisive leadership then, though praised by consultants, could also backfire on them, and a significant portion of pre-contract conversation involved consultants attempting to identify the personality and quality of the potential client’s leader. As

Jim put it, in the case of a museum that hired InsightSolutions without meeting the consulting team, "[when they told us] 'you've got the work,' I said, 'I'm flattered, but can I meet the executive?'"

In the process of consultant work, a preference for decisive leaders as good clients often slid into a global preference for decisive leaders among client nonprofits. One InsightSolutions staff member told me that Jim avoided working with Quaker organizations due to these organizations' preference for consensus-based decision-making. A colleague elaborated on this, telling me she "believes in collaboration and consensus, but often what organizations really need is a leader who can say this is where we need to go, and I'm accountable." She gave the example of a particular client whose leader came out of the military--"he is all about getting peoples' input and everyone being represented, but can also say, this is what we are doing." Arthur from ArtsNow articulated a similar preference for a directive leadership style, telling me that across organizations he saw good leaders as visionary, compelling, and "leaders, not consensus-builders. Consensus builders can go for the lowest common denominator, or the sense of the room, while good leaders lead the group to an outcome." Here, Arthur specifically distinguished decisive leaders from consensus-builders, suggesting that asserting control was key.[52] Indeed, Sara suggested that decisiveness was an inherent quality of "normal" leadership, suggesting that when the consulting team met with a client organization's executive director, that "most likely, just because of human behavior, we will get the [decision] we need. Normal leadership behavior is to say, 'this sounds best to me.'" Normal leaders, in her words, were decisive leaders.

In summary, consultants' preference for decisive leaders as critical to the success of their work slid into a preference for decisive leadership among nonprofits as a whole and the notion

[52] This comment also resonated with how leaders of boutique firms distinguished their work from that of other firms, a topic I discuss in Chapter 7.

that leader characteristics were key to nonprofit success. Effective organizational leaders, consultants articulated, were critical in implementing the formal structural and networked ideals that consultants promoted elsewhere in their work.

"Environment" as Out of Reach

What was framed as outside of organizations' control in this process of ontological gerrymandering were client organizations' environments. Often left unspecified, this concept encapsulated macro-environmental trends, funding availability, local communities, and the actions of competitors. Like consultants' tendency to blame client problems on the variables over which consultants felt clients had control (i.e. structure, leadership), at InsightSolutions problems for both the firm and for clients were often attributed to the environment as a rapidly changing, harsh, and somewhat unpredictable force. Attributing problems to the environment functioned to avoid critiquing the client organization for a failure to evolve or shift over time and was done consciously, as InsightSolutions understood blaming the environment to be a palatable explanation for clients. As Jim put it in a meeting about a troubled client, "we have to present it to them in a way that feels like they have a path forward that feels like victory, not retreating with their tail between their legs. We should focus the report on how the environment has changed, and not 'bad dog.'" Amanda articulated a similar strategy for another InsightSolutions client. "We're like, "This isn't you, this is the field. But there are people in the field doing a great job of it. You're not one of them. It normalizes it for them, it makes them more open to hearing the feedback." By backgrounding the organization's environment and past behavior as not relevant for analysis, as Jim said, consultants were able to focus the client on future success, avoiding infighting or guilt by organizational staff. Just as consultants' research processes

framed formal organizational structure, networks, and leadership as the key variables over which clients had control, consultants simultaneously backgrounded clients' environments, framing this variable as *out* of organizations' control and focusing future planning efforts on other variables.

Recap: Mosaic Rationalization

In summary, consultants' work to define the variables on which client nonprofits focused can be considered a process of ontological gerrymandering, in which consultants defined organizational mission, structure, networks, and leadership as the categories over which nonprofit organizations had control, while backgrounding the bases upon which these elements were selected, the definitions of these and other variables, and other potential categories nonprofits could consider. As part of this process, clients' environment was defined as out of organizations' control, as a strategy to deflect blame from organizations themselves, influence organizational decision-making, and focus on future, rather than past behavior.[53]

Consultants' focus on organizational structure, leadership, and mission echoes Hwang and Powell's (2009) definition of rationalization as the imposition of clear identities and formalized roles and rules on nonprofits such that they can act agentically in accomplishing set goals. The formal organizational structure that consultants promoted as a key variable over which their clients had control aligns with the notion that rationalization entails the imposition of formalized roles and rules in nonprofits, and consultants' preferences for decisive leaders and clear, interlocking roles for clients and partners echo Hwang and Powell's contention that rationalization involves converting nonprofits into agentic instruments of goal attainment.

[53] It may be that in some, if not most cases, clients' environments in fact *were* out of their control. However, as the previous sections showed, consultants used the concept of the environment to deflect blame for clients' problems away from the organizations themselves.

Like consultant-driven replication of existing nonprofit practices, we would expect that this consultant-driven rationalization, focused on formal organizational structure, leadership, and networks, would contribute to structural homogeneity among nonprofit organizations, thus aligning with expectations from the literature about consultants as agents of institutional diffusion (Sahlin-Andersson and Engwall 2002). However, like in the replication case, in the case of consultant-driven rationalization the nature of consultants' research processes again averted this homogenizing effect, instead producing a phenomenon I call *mosaic rationalization.*

Again, the unique peer and stakeholder groups consultants defined for each client were the mechanism that drove this phenomenon. While a focus on formal roles and responsibilities is core to nonprofit rationalization, the particular formal structures that consultants promoted to clients stemmed from the managerial structures that were common among each client's unique peer group, meaning that the structural elements that consultants promoted were neither consistent nor necessarily rational. For example, for its health and social services client, InsightSolutions recommended creating a board committee to implement a merger with a peer organization and adding a new staff position dedicated to marketing, to correspond with the practices of peer for-profit homecare organizations. In contrast, for its sports youth development client, InsightSolutions recommended establishing a separate arm of the program for girls (with a woman leader), to match peers' practices. Given the profound differences between these two organizations' missions, we would not expect consultants to recommend the same strategies to both; however, in both cases, the specific structural elements popular among the client's peer group influenced consultants' recommendations. So while consultants reinforced a focus on

formal structure across nonprofit clients, they did not, for the most part, diffuse consistent structural elements across nonprofits or contribute to structural isomorphism.[54]

As these examples show, while consultants promoted a *general focus* on formal organizational structure, networks and decisive leadership across clients, these recommendations did not yield inter-client homogeneity. The particular structural elements that arose for each client via research with a unique group of peers created variation in the options client organizations pursued within a general rationalizing approach. Like in the case of consultant-driven replication of existing practices, I call the result *mosaic rationalization,* in which the nature of rationalization for a particular client was determined by the makeup of its unique peer and stakeholder group. While consultants may have promoted similar formal structural elements among multiple historic park clients, for example, they might have promoted different elements for museum clients, yielding structural variation, not homogeneity, in the nonprofit sector.

Conclusion

In institutional theory, consultants are understood to be agents of normative isomorphism, part of a flood of similarly-trained professionals spreading legitimated forms across institutional fields. This chapter reflects such a role for consultants. Via their research processes consultants promoted replicating common practices in the nonprofit sector, and reinforced status-quo power arrangements in which the voices of people with power over client organizations were prioritized over individuals over which clients had power. Consultants also directed nonprofits to focus their attention on variables that aligned with Hwang and Powell's (2009) definition of nonprofit rationalization--formal organizational structure, networks, and leadership.

[54] An exception was consultants' ubiquitous promotion of board committees as important formal structural elements across clients.

However, the process by which consultants performed this role, and the sources of the legitimated organizational building blocks consultants promoted, were not fully contained within existing institutional theory. The characteristics of consultants' peer research and stakeholder interviews processes, designed to render consultant work accomplishable and efficient, as well as the structure of consultants' engagements as a whole, shaped the outcomes of these same research processes. Rather than simply diffusing rationalization across nonprofit organizations, consultants' strategies to synthesize information, the dual purpose consultants posited for interviews, and the centrality of client leadership in consulting work also led consultants to guide their clients to replicate existing practices in the nonprofit sector. Instead of serving as carriers of legitimated norms that originated elsewhere into the nonprofit sector, the characteristics of consultants' research processes influenced the mix of rationalized and status-quo practices consultants promoted to clients.

Critically however, even as consultants guided their clients to replicate existing practices and rationalize their organizations, they paradoxically did *not* promote consistent options for organizational structure across multiple clients. Stated otherwise, consultants did not act as homogenizers of nonprofit practice, despite their portrayal in the literature as agents of managerial standardization (e.g. Hwang and Powell 2009; DiMaggio and Powell 1983:152). In the case of consultants to nonprofits, replication and rationalization did not lead to homogeneity because consultants, in the course of their research processes, defined unique peer and stakeholder groups for each client nonprofit, which they used to generate and evaluate options for clients and establish clients' position in their fields. By using these client-specific peer and stakeholder groups as points of comparison and sources of information, consultants ended up enacting *mosaic replication* and *rationalization.* Consultants guided nonprofits toward options

for organizational structure that were common *within* each client's peer group and that followed the unique perspectives of clients' stakeholders, while reinforcing variation *between* clients and peer groups. Rather than generating inter-organizational homogeneity in the nonprofit sector, mosaic replication and rationalization, enacted by consultants, reinforced and reproduced an irregular and heterogeneous nonprofit landscape.

Chapter 5
"There are No Standard Projects"
Customizing Frameworks and Discussing Data

In institutional and management theory, consultants play an important role in the global diffusion of management ideas, acting as "carriers" of ideas into new organizational and institutional contexts. Via this role, consultants are thought to contribute to intersectoral convergence--scholars suggest that consultants, using standard tools and peddling consistent ideas, apply similar solutions across organizations and contexts, pushing organizations toward common ideals of good practice (McKenna 2006; Meyer and Bromley 2013). However, recent work on quantification (Christin 2018) and corporate management consulting (Sturdy et al. 2009b) suggests that context matters in how ideas diffuse, producing variation where we might expect homogeneity. Expanding on this idea, in this chapter I show that when consultants[55] to nonprofits implemented standard tools in day-to-day practice with client nonprofits, they produced varied, rather than consistent, recommendations[56] for clients.

Existing literature would not predict that consultants propose uniform strategies for distinct organizations--consultants naturally tailor their recommendations to clients' unique identities and needs. However, I show in this chapter that while consultants' tools contained consistent ideas about good managerial practice, specifically around focusing efforts, tightly

[55] This chapter is focused primarily on small and medium-sized consulting firms, such as InsightSolutions, FocusImpact, and ArtsNow, that heavily used facilitated meetings in strategic planning. However, my argument is also relevant to larger firms like WorldAdvisors, given that, as Chapter 1 explained, facilitated discussions were also an important part of these firms' work. I would not expect this chapter's argument to hold in the case of a multinational corporate consulting firm like Analytico.

[56] Note that the consultants I studied would not characterize the strategic plans they produced for clients as "recommendations"--rather, consultants referred to the set of practices, strategies, and goals they developed as "the client's strategic plan." I refer to these plans as recommendations to highlight the fact that clients, upon receiving consultant-produced plans, could choose the degree to which they agreed with and implemented the plans.

coupling activities and desired outcomes, and using data to make decisions, these ideas were not uniformly transferred into clients' plans. Rather, consultants' methods for implementing their tools produced variation in the managerial practices and strategies[57] they promoted.

I focus my analysis specifically on consultant-facilitated strategic planning meetings, in which consultants and clients came together to review consultants' findings and prioritize among resultant options. Within this, I focus on two cornerstone tools that consultants often brought to meetings--conceptual frameworks and data about client organizations. I analyze both the meanings encoded in consultants' tools and the ways consultants *used* frameworks and data in meetings with clients. While consultants' conceptual frameworks and use of data were meant, in the abstract, to push nonprofits toward a uniform image of organizational activity that Meyer and Bromley (2013) claimed is spreading across global society, in deploying these tools in client meetings, consultants produced *variation*, rather than homogeneity, in the practices they recommended to clients. Consultants did this by customizing frameworks to clients' particularities and using data as an object to spark discussion, as they worked to manage client personalities and preserve positive relationships in daily practice.

In light of the previous chapter on consultants' research processes, while consultant-facilitated meetings took place at various moments during strategic planning, the meetings I analyze in this chapter tended to occur *after* consultants' research was largely complete, when consultants brought their research findings and options based on these findings[58] to clients for discussion. As such, in this chapter I show how the variation described in the previous chapter, in which clients' unique peer and stakeholder groups led to mosaic replication and rationalization,

[57] As a reminder, by "managerial strategy" I refer to practices related to decision-making and goal-setting, methods to track progress, and general approaches to taking action on organizational goals.
[58] Sometimes findings and options were presented in separate meetings, and sometimes both items were presented in a single meeting.

became even more pronounced as consultant-generated findings and options mixed with client representatives' ideas, opinions, and group dynamics in the course of discussion. This chapter therefore provides further evidence against existing arguments that consultants homogenize organizational practice, presenting a more nuanced view of the effect of globalized professional expertise on organizational fields.

I begin by describing the relevant literature for the chapter, encompassing the global diffusion of management ideas and consultants' practices as carriers and translators of these ideas. I propose STS theory on classification systems and relational work theory from economic sociology as tools to analyze consultants' practices, and then take up my two substantive foci in turn. I first analyze the conceptual frameworks that consultants leveraged in facilitated meetings with clients and used to guide clients' strategic plans. I argue that these conceptual frameworks, which consultants used to synthesize and limit the information relevant to client engagements, by design pushed nonprofits toward a practical ideal as highly-focused and tightly-coupled instruments of social impact. However, in the course of applying these frameworks with clients, consultants customized and created new frameworks to reflect clients' unique circumstances, producing variation in consultants' recommendations to clients. Second, I analyze how consultants used data in client meetings. I show that rather than presenting data as objective bases upon which clients should make decisions, consultants used data as an object to catalyze discussion among client representatives, pursued an accelerated approach to research they called "directional accuracy," and told stories with data, equally weighting external information and clients' perspectives in decision-making. After each section, I describe consultants' justifications for their practices, and how consultants' approaches manifested in the infrastructure they used in their work. Together, while consultants' tools appeared to push nonprofits toward uniform ideals

of good practice, these uniform ideals were not passed along to clients as such. Instead, the way consultants *implemented* their tools in meetings produced variation in the recommendations for management strategy that emerged from their work.

Consultants as Carriers and Homogenizers

Consultants have been painted as protagonists in the global diffusion of management fads and ideas (Meyer 2002). Characterized as "carriers" of universalized managerial ideas originating in business schools and other areas (Faust 2012), consultants, scholars argued, have contributed to growing homogeneity across organizations in traditionally distinct sectors. As Meyer and Bromley (2013) explained, the government, corporate, and nonprofit sectors, previously understood as largely distinct, have converged under a general category of "organization." Meyer and Bromley claimed this convergence as attributable to meta-cultural shifts in a globalized world--the expansion of rights centered on individuals, and a normative orientation toward scientific problem-solving across sectors (See also Drori, Meyer, and Hwang 2006). This argument resonates with similar claims about neoliberalism as pushing out definitions of worth not based on market performance (Lamont 2012), and theories that predict growing isomorphism around market-based rationales and practices, as market logic expands over society (Barman 2016).

These meta-ideas are translated across sectors into organizations by ever-expanding populations of formally-educated professionals--including consultants--who are attuned to universal principles rather than local contexts as sources of ideas (Meyer 2002). Such professionals bring ideas into organizations under the guise of professionalization and best practices, leading to blurred distinctions between organizational types. Uniform "organizations"

are purposive and independent actors with clear identities, led via a central CEO's agentic decision-making (Meyer and Bromley 2013; Meyer 2002). Organizations employ strategic plans to build means-end relationships between activities and target outcomes, and engage in careful resource tracking (Meyer and Bromley 2013), echoing Simon's ([1947] 1997) classic notion of rational decision-making via linked means-end chains.[59]

This description of uniform "organizations" aligns with specific arguments about the nonprofit sector. As mentioned previously, amidst a prevalent perception of nonprofits as "organized anarchies" with fundamental goal ambiguity and unclear technologies and processes,[60] Hwang and Powell (2009) argued that rationalization is spreading across the nonprofit sector. Defined as "the integration of formalized roles and rules around unified sovereignty, entailing the construction of nonprofits as 'actors' with clear identities" (272), rationalization has led the nonprofit sector to "become more formalized and much more professional" (Bromley, Hwang, and Powell 2012). As I previously discussed, consultants are considered agents of nonprofit rationalization; their use among nonprofits "reflects a widespread effort to improve productivity and render nonprofit activities more methodical, […] contribut[ing] to both an image and a mind-set that renders nonprofits more instrumental and focused" (Hwang and Powell 2009). While leaving the content of consultants' work unspecified, these authors argued that consultants both create an image of the ideal, rationalized nonprofit, and shift nonprofit managers' dispositions such that they in turn rationalize their nonprofits.

Many scholars of nonprofits conflate rationalization with the idea that nonprofits are becoming "business-like"--taking on the goals, structure, and rhetoric of for-profit corporations and correspondingly turning toward professional managers, commercialization, and service-

[59] Dobbin (1994) reminds us that all definitions of normatively "rational" behavior are socially produced.
[60] I described this perception in detail in Chapter 1 of this dissertation.

delivery in their work (Maier, Meyer, and Steinbereithner 2016). However, Bromley and Meyer (2017) claimed that the notion that converging organizational forms represents a "business-ification" of other sectors is inaccurate, given that many characteristics of the universal "organization" originated from sources that predate the emergence of the modern corporation.[61] Regardless, across these theories, making organizations more rational, more instrumental, and more formalized brings about increased similarity *between* organizations, specifically in terms of organizations' formal structures and use of managerial strategies (e.g. developing focused goals, tracking resources, aligning activities with specified outcomes) associated with rationalization and professionalization. In this chapter, I show via the case of consultants to nonprofits that the former can occur without the latter--that is, while consultants promoted a consistent *image* of nonprofits as instrumental and rationalized, they simultaneously promoted variation in practice across their clients. In doing so I paint a more complex picture of consultants' involvement in inter-organizational convergence.

Diffusion in Action: Consultants' Practices

To explain consultants' theorized role in inter-organizational diffusion and homogeneity, scholars have looked to consultants' day to day work practices. Scholars of management fads have argued that consultants both author new management strategies and repackage ideas produced elsewhere, facilitating dissemination by extrapolating from particular cases to generalized recipes that contain sufficient ambiguity to allow applicability across contexts. Consultants, these scholars argued, also use persuasion to convince clients of the usefulness of oversimplified management solutions, which can yield unsatisfying results (Strang, Robert, and

[61] For example, strategic plans were first used in the military, as part of wartime strategy exercises.

Akhlaghpour 2014). Some scholars have suggested that consultants reframe clients' problems to fit standard solutions via "linguistic artefacts," including language, images, and metaphors, "packaged into interpretive templates--collections of connected tools that contain a label for the situation, a set of characters, associated metaphors, and a plot that prescribes actions" (Czarniawska and Mazza 2012). As Sahlin-Andersson and Engwall (2002) put it, "local experiences […] tend to be presented to [clients] in terms of existing prototypes or examples and with the use of references, categories, scientific concepts, theoretical frameworks, and widespread classifications that are familiar" (286). Consultants also rely on work completed for previous clients, which they draw upon and adapt to new situations (Galal, Richter, and Wendlandt 2012). Via the consulting process, scholars have argued, consultants reframe client needs in terms of consultant expertise, framing client problems in terms solvable by consultants' typical solutions (Bloomfield and Best 1992).

To accomplish this framing, consultants implicitly or explicitly use categorization, analogy, and quantification. By referencing standard categories, consultants can easily treat new situations as "cases" of general processes, directing their attention to quickly identify the relevant solution (Heimer 2001). Analogies facilitate categorization based on just one shared criterion, such that consultants can claim the broad applicability of solutions (Stinchcombe 2001).[62] Indeed, most major consulting firms refer to clients as "cases," and in hiring evaluate candidates' ability to classify client problems and identify relevant solutions. Quantification similarly facilitates comparison and streamlines decision-making by flattening detail and replacing individual discretion with the perceived objectivity and legitimacy of numbers (Porter 1992). Prince (2014) called consultants "calculative experts;" according to Hwang and Powell (2009),

[62] As I described in the previous chapter, consultants also used analogies to identify clients' analog peer organizations during the peer research process.

consultants' "strategic plans, independent financial audits, and quantitative program evaluations all represent attempts to measure […] nonprofit activities." These strategies position client problems within frameworks that bring with them particular definitions of problems, restricting alternate readings and delineating relevant information and possible solutions (Bloomfield and Vurdubakis 1994; Oakes, Townley, and Cooper 1998; Prince 2014).

Historian Christopher McKenna (2006) provided evidence of the impact of such strategies in the nonprofit sector. McKenna argued that in the 1950s, a corporate consulting firm imported corporate strategies into the nonprofit sector and, by applying similar recommendations, templates, and tools across multiple prominent nonprofits, "helped create a universe of institutions that employed the same vocabulary and organizational tools in their daily management," aiding the nonprofit sector to recognize itself (142). As this example suggests, by employing uniform templates and tools across client organizations, consultants allegedly contribute to nonprofit institutional isomorphism (McKenna 2006; Kipping and Clark 2012). While building on scholars' work on corporate consulting, in this chapter I argue that consultants to nonprofits used their tools and templates in ways distinct from their corporate cousins' approach. Rather than consistently applying these tools across clients and manipulating *client problems* to fit consultants' templates, the process also occurred in reverse--consultants customized *their frameworks* to suit client particularities and used data to facilitate client discussion, producing variation, rather than consistency, in their recommendations to clients.

Translation and Variation across Contexts

As mentioned previously, some scholarship on consulting has contested the portrait of consultants as agents of inter-organizational homogeneity. Sturdy et al. (2009b) clarified that

consultants do not simply transport ideas wholesale from other contexts--instead, knowledge is co-constructed in client-consultant interactions. This line of thinking aligns with much earlier writing on management consulting that suggested clients and consultants, supposedly equals, can learn from each other to identify custom solutions (e.g. Blake and Mouton 1983; Schein 2002). These scholars suggested that rather than serving as carriers of management knowledge, consultants "translate" ideas between institutional contexts and organizations, producing diverging versions and interpretations based on different contexts' distinct rules and conventions (Kipping and Clark 2012; see also Czarniawska and Sevon 1996). Additionally, just as agents of diffusion may adjust tactics to translate ideas into new contexts, the recipients of consistent ideas and technologies in different contexts may have divergent reactions. In a study of quantification in the field of journalism, Christin (2018) found that analytics were used for decision-making in United States newsrooms, but were viewed with ambivalence in France. Intra-consulting firm dynamics can also produce variation--for example, Hargadon and Betchky illuminated how patterns of help seeking in a software consulting firm affected how staff used prior projects to create new models (2005).

Correspondingly, environmental dynamics in organizational fields can affect how ideas diffuse. Meyer and Bromley (2013) pointed out that as organizations shift toward the universal "organization" form, the need to respond to multiple demands and segments of the environment necessitate subunit proliferation, leading to variation. This phenomenon aligns with observations about the nonprofit sector--despite professionalization, the sector is, Bromley, Hwang, and Powell (2012) argued, "not necessarily more cohesive, coherent, or successful" (See also Suarez 2010). In this context, scholars have called for more study of the variation produced by consultants-as-translators. How do consultants, working in disparate institutional contexts, edit

ideas in ways appropriate to each context (Sahlin-Andersson and Engwall 2002:283-286)? Relatedly, how do fields undergoing shifts like rationalization that supposedly increase inter-organizational uniformity in formal structure and managerial strategy remain heterogeneous?

This chapter addresses these questions by showing that while consultants' tools promoted rationalization across nonprofits, the practices by which consultants *used* these tools in client meetings produced variation in the ideas consultants promoted to clients. Not only can ideas take on different meanings in different contexts (e.g. Christin 2018; Sturdy et al. 2009b); professionals can *use* consistent ideas in ways that *create variation* within particular contexts.

Analyzing Consultants' Tools and Relationships

To make this argument I rely on STS, which has been used elsewhere to analyze consulting (e.g. Bloomfield and Best 1992). Broadly, STS suggests placing consulting, as knowledge work, in context, and illuminating how social, cultural, and political context (the "situatedness" of knowledge) and the "invisible tools" of knowledge production (Haraway 1988; Vertesi 2019) affect the ideas consultants impart to clients. Specifically, I draw on work from STS focused on data and on standard classification systems. Bowker and Star (1999) revealed how classification systems like databases and forms simultaneously shape and are shaped by the social context of their production. Classification systems, they argued, allow for communication and coordination, but conceal information behind coherent facades. Bowker and Star pushed analysts to consider how standard categories were selected and constructed, and what such categories make visible and invisible. Additionally, investigating classification systems' *application*, these authors argued, illuminates the difficulty of fitting messy realities into

standard categories. In sociology, Fourcade and Healy (2013) made a similar argument about how market mechanisms to classify and score credit-worthiness influence people's life chances.

In a volume about standards, Lampland and Star (2009) relatedly advocated for attention to both the assumptions baked into standards and standards' local meanings in social interaction. Correspondingly, in a study of how scientists use Microsoft PowerPoint and Excel, Vertesi (2019) called for attention to both how standard technological tools guide action, and the particular ways people use tools to achieve local ends. STS scholars have analyzed scientific data in similar ways. Gitelman and Jackson (2013) argued that data, rather than self-evident records of phenomena, are actively "cooked" and interpreted as they are produced and processed. They urged attention to the assumptions encoded in data, and how these assumptions, rendered invisible in data once created, shape data's meaning and use. Following these scholars' guidance, this chapter focuses on both the assumptions contained in consultants' tools, and how consultants *deployed* frameworks and data in client meetings.

In this chapter I also leverage Viviana Zelizer's relational economic sociology (2010; Bandelj 2020), focused on how people define and maintain social relations through economic exchange. I briefly reviewed this literature in the introduction to this dissertation and will describe it in more detail in the following chapter--given that, I will not repeat it here. In short, however, I use a relational work lens to analyze how consultants marked positive and appropriate relationships with client nonprofits through interactions around conceptual frameworks and client data, and the practices consultants treated as germane to those relationships. I show how, by manipulating frameworks and data to manage client dynamics and maintain relationships, consultants produced variation, rather than homogeneity, in nonprofit managerial strategy.

Conceptual Frameworks as Image, Tool, and Platform

During all the strategic planning projects in which I participated during my fieldwork, consultants *framed* information in client meetings and associated reports. From the carefully-chosen order of items in a deliverable document to full-page flowcharts created with Microsoft Word SmartArt, consultants curated the information they presented as relevant to clients, the words they used to describe that information, and the relationships between different pieces of information, to guide clients' thinking and make consultant work manageable. In this section, I will analyze a key tool in consultants' framing work--conceptual frameworks that consultants used in meetings and deliverable documents to define clients' problems and synthesize information. I will show that the *design* of these frameworks contained a uniform image of the ideal nonprofit as a focused and tightly-coupled instrument of social impact. However, the practices by which consultants *implemented* these frameworks while managing clients' needs and consultant-client relationships departed from this ideal image, producing variation, rather than homogeneity, in the management strategies consultants recommended to clients.

Building a Shared Reality

One afternoon at InsightSolutions, I travelled with Ines to a suburb for a meeting with her health and social services client. We met in a well-worn building, with crayon marks and smudges on the walls, in a small conference room that adjoined the reception area; there was light layer of dust on the furniture and particle board peeking through the table corners. Ines connected an ancient laptop to a modest projector, looking around the room at the group of board members and senior staff in attendance. We were presenting results of the data-gathering phase of the strategic planning process. After outlining the work done so far, Ines foreshadowed five

options we had developed for the client's plan based on the research phase. She then moved on to the topic of conversation for the day, using the research findings to assess the client's situation. "There are many schools of thought about approaching strategic planning. Ours is primarily from Peter Drucker, the 'Theory of the Business.'" She clicked to a PowerPoint slide that outlined this framework:

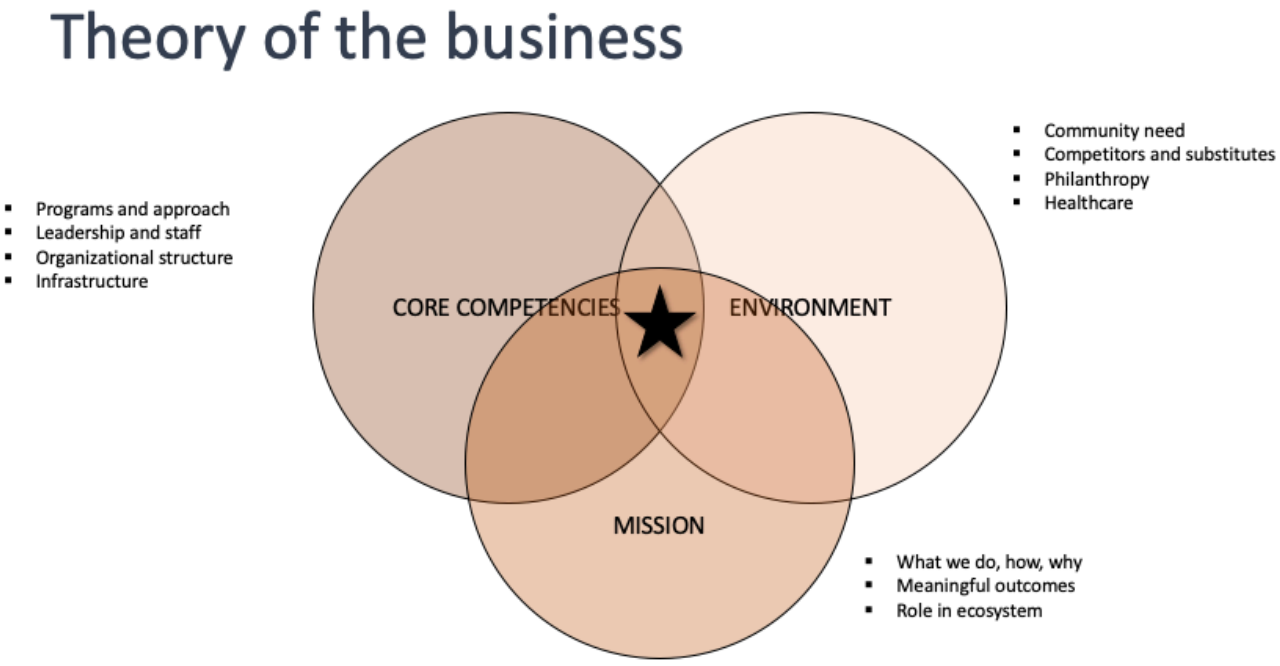

Illustration 7: Drucker's Theory of the Business

Ines explained Drucker's framework, which suggested that organizations should focus on three key elements--their core competencies, mission, and environment--"if they are aligned perfectly, you're in a sweet spot." Ines told the group that we structured a recently-delivered findings report around this framework, suggesting that we use the meeting to discuss how to apply Drucker's framework to the client's organization. She began by positing what she thought

constituted the client's core competencies--"we help communities that other systems don't serve or don't serve well […] you have a tailored and customized approach, a client-focused approach, really dedicated staff and leadership." She continued, narrating the client's situation in terms of the framework. In spite of the client's strengths, the "environment is changing quickly […] organizations like yours are scrambling to figure out what to do and what it means to be strategic. There is a sense among the board and staff that changes have outpaced your capacity to adapt." Ines mobilized the "Theory of the Business" to frame the client's situation, explaining the organization's struggles as a misalignment between mission, core competencies and a changing environment.

Marcie, a leader of a small consulting practice, suggested that conceptual frameworks like Drucker's "Theory of the Business"[63] represented consultants' "views of reality." In her words, "most consultants come to the intervention with some level of mental model--ideas about how things should function or work. It's our view of reality."[64] These "views of reality" had different sources--while some consulting firms, especially larger ones, created their own theoretical frameworks, smaller firms often repurposed frameworks produced by management scholars and other consultants. In addition to Drucker's "Theory of the Business," for example, Jim explained that for a recent InsightSolutions project "we bumped into this notion of Collective Impact. […] If we were of a certain size maybe we would do it differently, but we just don't have the luxury." Jim explained that the firm used the "collective impact" framework, coined by a prominent nonprofit consulting firm, for a recent project, coming across the framework in passing due to a lack of resources to scan the field more systematically or develop

[63] Consultants used other frameworks beyond Drucker's. I will discuss logic models, another oft-used framework, later in this chapter. Another popular framework was called the "Theory of Change."
[64] Frameworks also made consultants' work easier and more efficient; I discuss this in the next section.

its own frameworks. This adoption of prominent firms' frameworks corresponds with arguments that consulting firms mimic their "highest performing peers" in a bandwagon effect (Strang, David, and Akhlaghpour 2014) and that small firms indirectly act as translators of ideas that originated in large firms (Kipping and Wright 2012).

In order to leverage their chosen mental models with clients, however, consultants first had to convince clients of the usefulness of their frameworks--as Marcie put it, "build a shared idea of reality." In Ines' presentation, she accomplished this by deftly communicating how the "Theory of the Business" highlighted the client's strengths (its customized approach and focus on serving the underserved) and illuminated its struggle (to keep up with a rapidly-changing environment). Some scholars characterize this moment as a point of deception in consulting engagements, in which consultants persuade clients of the usefulness of flimsy concepts (Strang, Robert, and Akhlaghpour 2014). However, in order to assess the utility of the "Theory of the Business" for nonprofits, we must first understand the ideas about nonprofit practice the framework contains.

What Frameworks Encode: Ideal Nonprofit Practice Under the Rule of Threes

To understand the image of ideal nonprofit practice contained within tools like Drucker's "Theory of the Business," it is instructive to analyze the tool's contents and history. A prolific management scholar, Drucker is known as the "father of management thinking." Drucker's formative experiences took place in major corporations, including GM and IBM, and his writings spanned many elements of modern organizations, oriented around a belief in large businesses as critical societal institutions, the utility of applying the same modes of analysis to business and other institutions (Kantrow 2009) and the importance of customer orientation (Peter Drucker:

Accessed 2019). Drucker also wrote specifically about nonprofit management and the importance of a clear mission statement and good leadership (Drucker 2006).

The "Theory of the Business" Ines used can be traced to a 1994 article in *Harvard Business Review*, in which Drucker used accounts of corporate triumphs and failures to articulate a theory of organizational success, pitching his argument to a corporate audience.[65] Under the "Theory of the Business" framework, organizations should focus on programs and services that live at the intersection of their mission ("how the organization envisions itself making a difference in the economy and in society at large"), core competencies (what the organization must do well in order to accomplish its mission), and environment ("society and its structure, the market, the customer, and technology") (Drucker 1994).

In the nonprofit context, the "Theory of the Business" framework has also been de-linked from its author and adapted to produce myriad similar versions, which are un-attributed to Drucker but basically indistinguishable from this approach. Consider, for example, FocusImpact's three-part framework, which features very similar categories.

[65] The *Harvard Business Review* is, incidentally, the publication of record for most consultants in the field--Jim keeps copies on the side table in his office, and in the general office waiting area.

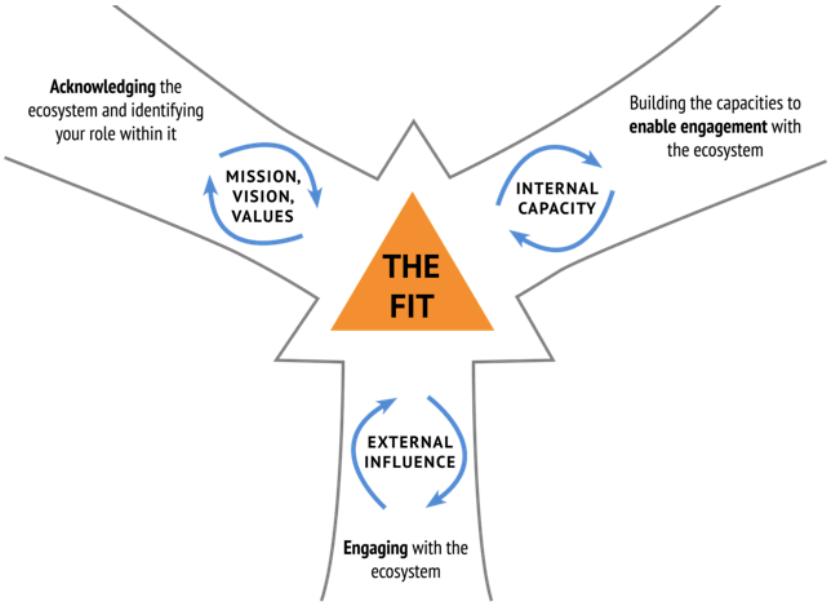

Illustration 8: FocusImpact's Three-Part Framework

Drucker's framework also bears similarity to those of major corporate consulting firms. As Frank, a partner in a small nonprofit-serving firm put it, "In the [corporate] approach, the inside joke is that everything is the rule of threes. All things have three parts, and you can attack any problem essentially by looking at it [this way]." Another consultant identified the "Theory of the Business" as particularly aligned with a specific corporate firm's methods: "core competency, what is your organization differentially good at. That comes straight from StrategyGlobal, that's StrategyGlobal DNA." He specifically pointed to the concept of core competency, defined via contribution to revenue, as aligned with corporate consulting firms.

The various frameworks with these general characteristics--three interlocking elements that must be aligned for success and for which misalignment indicates a problem--are simple enough to facilitate broad applicability across sectors and organizations, a classic consulting strategy (Bloomfield and Best 1992). Widely used by nonprofit consulting firms, such tripartite

frameworks flattened the complexity of individual nonprofits and distinguished relevant and irrelevant information for consultants' inquiries, funneling consideration of cause and effect to the three framework elements and the degree of alignment between these elements. This allowed consultants to categorize client problems in terms of conventional consultant approaches (Bloomfield and Best 1992) such that problems and solutions "exist within the same frame" (Bloomfield and Vurdubakis 1994). In the strategic planning context, such frameworks were meant to shift and simplify client decision-making to focus on achieving alignment between mission, core competencies, and environment. In so doing, problems facing organizations and options to solve them, as well as information gathered by consultants, were to be primarily considered in relationship to the framework category(ies) to which they pertained, and their impact on the goal of aligning the three elements. This imposed a structure on clients' decision-making and established a clear role for consultants in guiding client discussion.

Proceeding from Bowker and Star's (1999) directive to identify the master narratives embedded in classification systems, via a focus on alignment, the "Theory of the Business" applied Drucker's arguments about clarity in organizations to frame the ideal nonprofit as a tightly-coupled entity with a carefully-constrained focus. This focus, the organization's "unique value proposition," was defined in Drucker's framework as the intersection of interlocking elements. A FocusImpact PowerPoint deck made this coupling clear--the organizational vision, "a brief statement describing the clear and inspirational long-term desired change resulting from an organization's work," contained the mission nested within it: "[Mission] answers the questions: Why does our organization exist? What's our role in accomplishing the larger societal vision?" Organizational vision, generated in response to identified needs in the environment, was coupled with a more specific mission, identified based on the competitive environment within

which the organization operated. This mission was correspondingly coupled with the organization's core competencies, activities the organization must do uniquely well in order to accomplish its specific mission. Together, these interlocking definitions framed nonprofits as agentic and closely-coupled instruments of specified goals.

The particular image of good nonprofit practice embedded in the "Theory of the Business" framework aligns with definitions of nonprofit rationalization (Hwang and Powell 2009) and Meyer and Bromley's universal "organization" form (2013). Across these concepts, nonprofits are to be purposive actors with clear identities and formal structures that link activities to target ends. Additionally, informed by Drucker's preference for universally-applicable models, the "Theory of the Business" works equally well for for-profits and nonprofits, equalizing organizations across sectors and aligning with some scholars' arguments that nonprofits are becoming more like businesses (Maier, Meyer, and Steinbereithner 2016).

Unsurprisingly, the general ideas promoted by the "Theory of the Business" also aligned with common consultant perspectives about nonprofit work. According to Gina, leader of a large corporate firm, large and small consulting firms had the same general goals--"pushing for focus, pushing for clarity, for something that is measurable and for everyone to really be excited about it." Indeed, InsightSolutions recommended that clients who lacked a clear focus pause and clarify their work first, before or instead of proceeding to the client's intended project. Additionally, some consultants explained their work as equalizing practice across businesses and nonprofits. As an ArtsNow consultant put it, "I don't care if you're for-profit, nonprofit, you're running a business and need to understand how business works. […We use] frameworks […] data visualizations, pie charts, […] so [clients are] understanding business concepts without

being business gurus." She used conceptual frameworks and charts to communicate business concepts that she felt were equally applicable across sectors to clients.[66]

In sum, the design of conceptual frameworks commonly used by consultants contained a uniform, consistent image of good practice across nonprofits, one that aligned with scholars' definitions of nonprofit rationalization and universal organizational forms, and was equally applicable across sectors. In using these frameworks with clients, consultants spread the language their frameworks contained consistently across organizations. We would correspondingly expect that consultants, by using these frameworks, would consistently embed the ideas about managerial practice the tools contained into client recommendations, thus acting in their theorized role to homogenize nonprofits.

Frameworks at Work

However, this expectation was not substantiated in day-to-day consulting practice. Instead, in implementing frameworks like the "Theory of the Business" in interaction with clients, consultants used frameworks to elicit clients' hopes and emotions, and customized and created new frameworks to suit clients' unique characteristics, accommodate their reactions, and maintain client-consultant relationships. In doing so consultants introduced, rather than stripped away, organizational context, which produced variation, rather than homogeneity, in the strategies and practices consultants recommended to clients.

After presenting the "Theory of the Business" to her health and social services client, Ines facilitated the group to envision the organization within this frame. She began with the "core competencies" element: "What's your proudest accomplishment over last five years?" A senior

[66] However, some kinds of consultants used a business-forward approach more than others. This will be discussed in Chapter 7.

staff member responded immediately, touting her area's accomplishments. Ines reinforced her pride, explaining that this area was also "emphasized by external stakeholders--the need for quality services for kids is only growing." Another senior staff member explained the longstanding impact his area had accomplished for vulnerable seniors, but lamented that due to changes in funding, this work had recently become harder. Ines interjected. "Let's stay on this for a moment. I realize that means we have to pontificate, but why are we still here? To acknowledge and celebrate." The staff member chimed in--"because we do good work." Ines nodded warmly. Later, in an interview, she explained this moment to me.

> What's really hard is when, going back to Drucker, your mission hasn't changed. The external world has changed profoundly, which means that what you do and how you do it needs to change 'cause they'll be out of alignment. [Clients'] number one pain point is when the organization's internal narrative about who they are and why they're important doesn't align with what's happening in the world.

Rather than using the "Theory of the Business" as a dispassionate tool with which to diagnose and solve client nonprofits' problems according to standard logic, Ines moved quickly to personalize the tool and populate it with the hopes and emotions of client staff members. She weighed staff perspectives equally with external data collected by InsightSolutions, drawing these sources together to highlight the organization's unique strengths and validate client representatives' pain, which she attributed to forces outside of the organization's control--the changing environment. She used the framework to animate rather than strip away the human elements of the organization, leveraging it as a tool to narrate the emotional experiences of staff.

In using the "Theory of the Business" to elicit client representatives' emotions, Ines also defined her role as an empathetic facilitator of clients' ideas rather than a source of external advice.[67] However, her practice of privileging clients' opinions could sometimes work *too* well.

[67] I will discuss this contrast at length in Chapter 7.

Later in the strategic planning process with this same client, Ines lamented the need to "turn down the volume" on the Executive Director's preferences: "I keep getting sucked into his own thinking," she told me, which prevented her from applying her analytical lens to the situation. While consultants used frameworks to elicit clients' perspectives and emotions, client perspectives sometimes grew to eclipse consultants' frameworks, threatening to compromise consultants' ability to provide an independent perspective on clients' work.

Customizing Frameworks as Social Engineering

Relatedly, consultants *customized* their frameworks to engineer consensus, reflect clients' unique characteristics, and accommodate the reactions of client representatives. As Nathan, an arts-focused sole proprietor consultant explained, using conceptual frameworks to generate consensus "makes it hard for a reluctant person to sabotage [the process] later." Take the case of logic models, another frequently-used conceptual framework in consulting. Consultants used these frameworks, diagrams with 4-5 columns that linearly detailed relationships between program inputs, activities, outputs, outcomes, and impact, to help clients codify theories of how their programs would lead to desired impacts. However, logic models also served a relational purpose. As Marion from FocusImpact explained, she used logic models as part of building agreement within client organizations.

This point is exemplified by another InsightSolutions case. Midway through the strategic planning process for InsightSolutions' sports youth development client, Ines, Margaux, and I customized a logic model to synthesize several client representatives' ideas and capture the organization's unique characteristics. In a meeting about the client, Ines offered, "I think I want the findings document to have a draft logic model for [the client] to respond to--I have a really simple one that I stole from EducationWorks." She suggested that "reacting to" a logic model

would help client representatives agree about the focus of their expansion plan, adapting a simplified template that she had already customized for previous clients. Ines, Margaux, and I later facilitated a meeting of the client representatives to populate the logic model, lining up blank chart paper sheets on a wall and filling in the categories with ideas from the various group members--the organization's founder, its executive director, senior program staff, and the leader of a peer organization.

In a subsequent meeting, Margaux reviewed the results of the exercise with the group, explaining that we had "condensed and organized" participants' ideas to fit them into the logic model categories. She walked the group through each column of the logic model in turn. "Resources--you need these things to make the program happen. The next column is Activities." She explained that she, Ines, and I had customized the template by dividing up the "activities," "outputs," and "outcomes" columns into three sub-areas to match the program's unique characteristics. After verbally walking the group through the document, Margaux asked for feedback about what we got right and wrong, and prompted the group for missing program components. She and the rest of our team used the logic model framework to organize various committee members' ideas into a coherent and linear form. We also customized the framework in order to reflect the client organization's particular characteristics, and maintained carefully-calibrated consultant-client power relationships by deferring to clients' perceptions of the accuracy of our synthesis.

ArtsNow also customized its conceptual frameworks to reflect client particularities. One afternoon, I joined a virtual Zoom meeting in which Isabel, Susannah, and Morgan were strategizing about a group activity planned for an arts funder client. ArtsNow was in the middle of the strategic planning process and planned to use a game to prompt client representatives to

map ideas into a linear structure. In earlier process stages, the ArtsNow team had generated a whopping 86 "strategies" for the client to consider by distilling the results of staff surveys, interviews, and other meetings. As Susannah advised me, it did not matter what the consultants thought of a particular strategy--"if someone thought it was important, it was important"--the consultants deferred to clients' preferences in whether ideas should be included. Through the game board activity, the client representatives would map each strategy (a discrete action the organization could take) onto a corresponding objective (an intermediate goal), larger goal, level of prioritization, and method of evaluating success. The ArtsNow team began its Zoom meeting by reviewing a standard game board template that Morgan proposed the group use. Each board pertained to a particular goal, with rows for each objective and spaces for strategies to be grouped according to priority:

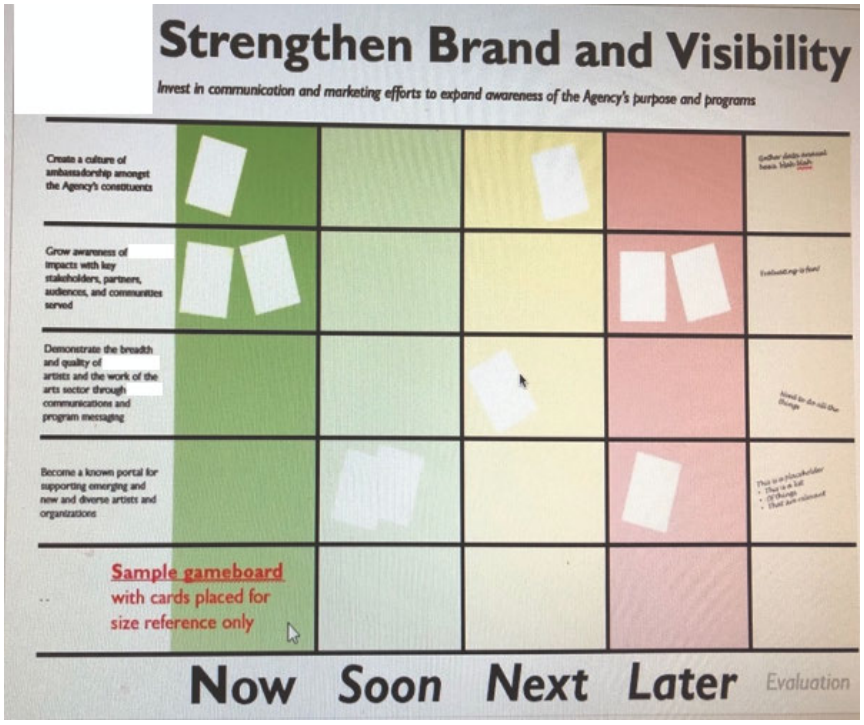

Illustration 9: An ArtsNow Game Board

However, Isabel was concerned that the structure of the standard board did not suit the client's particularities. "I'm struggling with the linear-ness. I don't think a strategy goes to an objective [in this case]. And objectives won't be evaluated." She suggested that for this client, objectives should be listed across the top of the board as general reference categories for participants, and evaluation should be removed and conducted as a separate exercise. Morgan sketched out this revised game board, and showed the group on-camera.

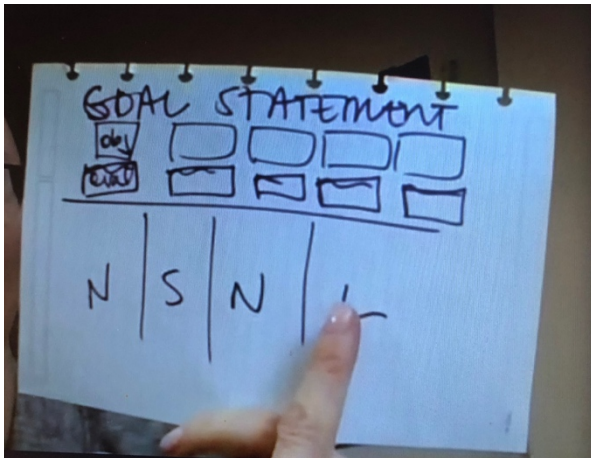

Illustration 10: Revising a Framework in Real Time

She later emailed us a new version of the game board, revised based on the conversation. She also created a separate sheet for the evaluation component of the activity, designing an exercise the ArtsNow team could use to facilitate the clients to identify evaluation metrics.

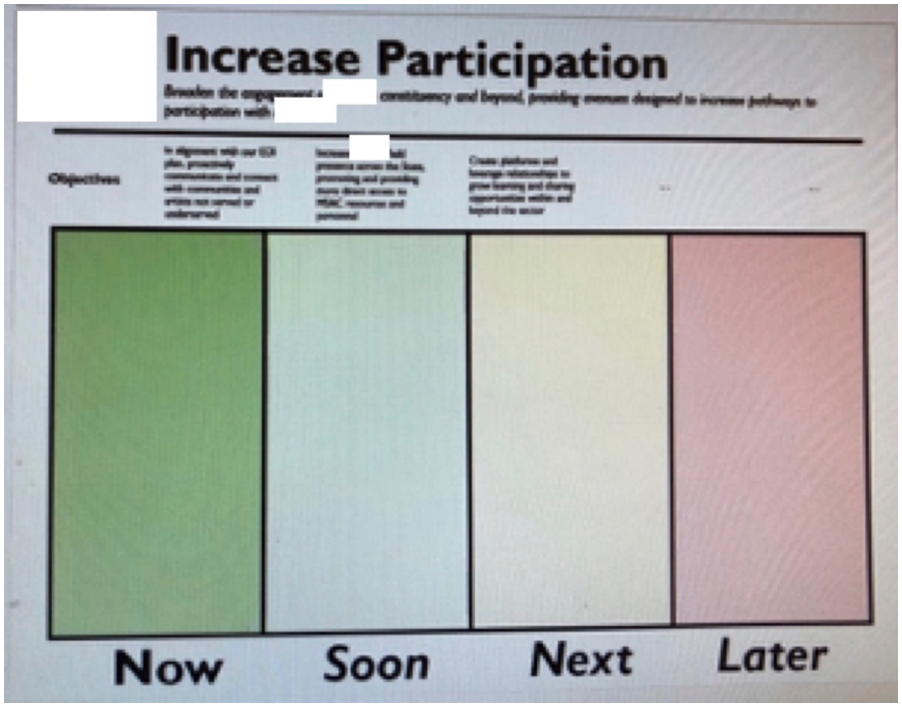

Illustration 11: A Customized Framework

ArtsNow customized a standard game template and approach in order to accommodate the particularities of the client's future plans, adding complexity and additional components to a previously-linear framework.

In addition to customizing their frameworks *in advance* of client meetings based on client circumstances, consultants also sometimes made changes to their conceptual frameworks in real-time, to accommodate clients' reactions. In one case, for example, InsightSolutions consultants customized the "Theory of the Business" elements included in a client's plan based on client representatives' reactions. During a meeting with Historic Park's strategic planning committee, Margaux facilitated a discussion to try to identify the organization's mission. The conversation was not terribly effective--the client representatives would not focus on the three options

Margaux offered them, and we ended up back where we started. Margaux tried to summarize the discussion and move the group toward consensus, but the participants drifted off again to other options. The group clearly did not like the options we offered them, nor fully understand the purpose of a mission statement. Margaux tried to bring them around, making the tradeoffs between the options clearer. "Do you want people to appreciate Historic Park and then do anything they want? Or appreciate Historic Park and better understand their community?" The group was noncommittal, and Margaux sighed. "We want everything, so we go back to the drawing board." Steven, one of the client representatives, questioned the approach. "I don't know if you can capture [what we do] in one sentence." Finally, Ines capitulated.

> Maybe we should think about a position statement, so we have more real estate to write this out. Honestly, we don't like big, long, broad mission statements […] we advise to err on side of more succinct, more specific. […] That being said, what we are hearing here is complexity, the many aspects we want to capture. Maybe we do mission, vision, position. That will give us a paragraph so we can play.

Based on the clients' inability to consolidate their work into a short mission statement, Ines proposed an additional element, a position statement, to accommodate their preferences.

This real-time customization sometimes amounted to a broader shift in consultants' plans for client meetings. Returning to the ArtsNow game board case, a few days after the Zoom meeting I observed, Susannah told me that ArtsNow did not end up using the evaluation activity Morgan created in the actual client meeting. Instead, the consultants facilitated a group conversation, as this seemed more appropriate to the day-of group dynamics. Indeed, such day-of shifts in strategy were common for consultants--as Isabel put it, in a Zoom call with Anna in which they attempted to prepare for a meeting for which there was no agenda, "remember, Sempre Gumby." "Always Flexible," Anna told me later. Consultants needed to be ready to shift or abandon their plans based on clients' reactions and needs.

Consultants used conceptual frameworks, then, to draw out and synthesize client perspectives and emotions, and organize them into internally-coherent, logical and temporally-bound sequences of cause and effect. In order to do so in a way that reflected client particularities and maintained positive consultant-client relationships, however, consultants customized both the content within their frameworks *and* the overall structure and logic of the frameworks themselves, adjusting one or both elements to ensure that the tools they used were appropriate to clients' specific contexts. Consultants also stood ready to abandon their tools as a whole, as client meetings unfolded in real time. Together, these practices produced variation in the managerial strategies consultants produced for clients, rather than promoting homogenous ideas across organizations. For example, the custom logic model InsightSolutions created for its sports youth development client had more categories than that created for EducationWorks; InsightSolutions thus promoted a more diffuse organizational focus in the former organization compared to the latter.

Making New Frameworks

Consultants sometimes took customization to the extreme, creating new frameworks to synthesize clients' information and convey consultants' recommendations, when existing frameworks failed to capture clients' unique characteristics and circumstances. A day at ArtsNow provides an evocative example. That afternoon, Arthur, Susannah, and Natasha met around a small glass table in the office's small conference room. Natasha had projected her computer screen onto a large TV that filled one wall--she had Microsoft Excel open, and the group was viewing a spreadsheet full of words. After I puzzled at the spreadsheet for several minutes, Natasha told me that the group was attempting to synthesize the results of a client workshop into a single scenario to recommend to the client. Natasha moved cells around in the

Excel sheet to try to highlight similarities between the multiple competing perspectives that emerged during the workshop, represented by sentences in different spreadsheet cells.

As the meeting proceeded, Arthur attempted to apply what he called a "values, capacity, and support" framework (from Harvard, he told me) to organize the information, but ultimately this did not yield clarity. The group next tried to logically connect what the client initially asked ArtsNow to do, to what the consultants would be recommending to the client. Arthur brainstormed out loud, walking through his ideas. The client, he said, had asked ArtsNow to identify what kind of arts venue the community needed, but the team concluded that the area lacked demand for arts programming. Given this, Arthur theorized that before building a new venue, the clients needed to demonstrate the value of the arts and build knowledge and commitment they could use to attract funding. He sat back and rephrased. "If money makes the world go 'round, and awareness and commitment are precedents to money, money drives capacity, content, and space. It's a teeter totter." He drew a diagram to represent his recommendation:

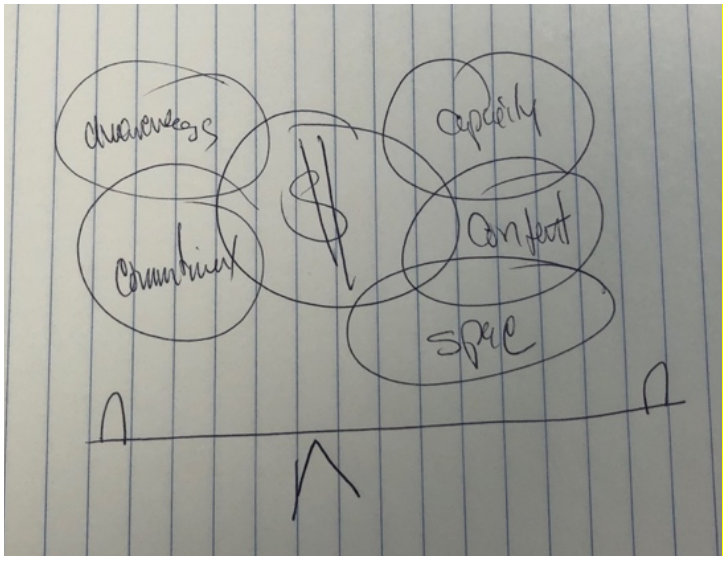

Illustration 12: A Brand-New Framework

Natasha told me later that this synthesis work "helps the client see that there's an emergent consensus in the group" about the components of the framework--it both reflected what the consultants saw as existing agreement between parties, and guided clients to what consultants saw as the right way forward. She told me that Arthur was particularly skilled at developing frameworks for "difficult" clients.

This case represents an extreme example of consultants' customization of frameworks to simultaneously engineer client consensus and reflect client particularities. The ArtsNow team manipulated conflicting client ideas and perspectives into a coherent conceptual framework, to help bring the client team to consensus. The consultants attempted to do this by applying an existing framework--"values, capacity, support"--but found this to be unsuccessful, so Arthur created a new framework to describe ArtsNow's recommendation. The failure of an existing framework to adequately capture clients' ideas prompted Arthur to create a brand-new conceptual framework to effectively reflect and manage the client's unique circumstances and relational dynamics. By applying this new framework to the synthesized feedback, the messiness of the idea-generation and synthesis process was hidden behind a diagram that rang true due to its coherence. The solution took on a logic of its own, derived but delinked from individual participant perspectives. Rather than adjusting an existing framework to accommodate clients' unique opinions, customization happened in the opposite direction--consultants created a custom solution in order to hide, rather than reveal, individual perspectives.[68]

[68] Perhaps notably, the largest and most prominent nonprofit consulting firms often created their own frameworks, but their purpose in doing so was different--these firms disseminated homegrown frameworks to the field as ways to advertise and share their work, rather than developing them to solve individual client problems.

Indeed, consultants were so interested in adequately capturing the complexity of clients' ideas and unique circumstances that technological limitations sometimes frustrated their attempts to create new frameworks. On a snowy afternoon, I sat with Natasha as she worked on a PowerPoint deck to present the results of ArtsNow's data-gathering phase to a client municipality. Her task was to "create an infographic to link all the information we have received to five themes we've created to anchor the project." Natasha opened the SmartArt menu of PowerPoint and clicked around, trying out different templates to capture the information. After a few hours of work, she produced a first draft, which she showed to Anna. Natasha was struggling to find a format that would adequately convey the complexity of the information. "I need a weave-y thing to connect different data sources to the themes they inspired." Anna gently critiqued the attempt--"it takes a little time to digest." She sighed, saying she shared Natasha's interest in an "alluvial diagram--they really show connections [between information]." The problem, they agreed, was that there was not enough space on the PowerPoint slide for her preferred diagram. Natasha settled on simplifying the slide further and adding animations, to better display the information. She swiveled back to face her monitor and quickly flipped through the slides, reviewing them. With each pass she further distilled the information, making sentences pithier, flowcharts cleaner. She later showed me her completed diagram:

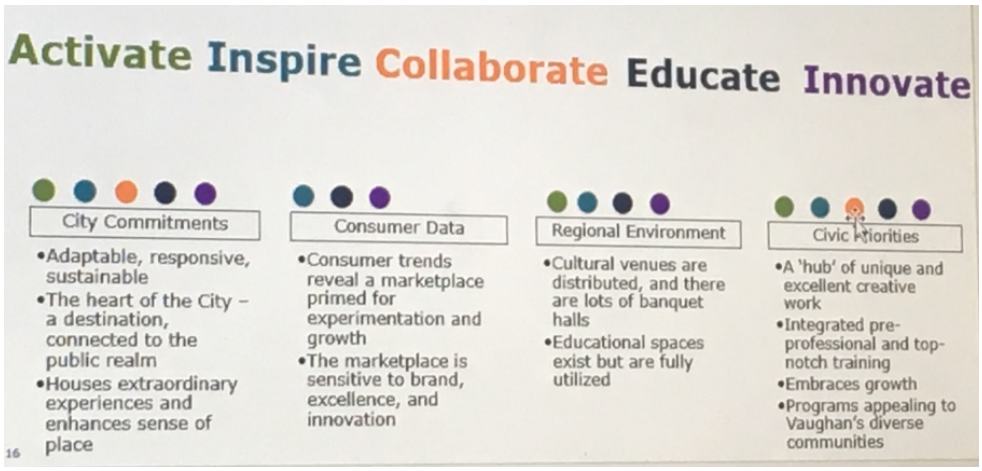

Illustration 13: SmartArt Synthesis at ArtsNow

In creating a framework to convey how ArtsNow synthesized information gathered for the client's plan, Natasha was limited by the constraints of PowerPoint as her chosen medium (Yates and Orlikowski 2007). Disappointed by the linearity of the SmartArt options, her desire to display more complex relationships between data sources and themes was stymied by a lack of space for her diagram of choice, causing her to return to bulleted lists to explain the framework ArtsNow developed for its client (Vertesi 2019).

Technology similarly stymied InsightSolutions consultants' attempts to visually capture complex client circumstances. During a meeting about a museum client, Ines stood up and went to the whiteboard. She drew out a chart with "outcomes" on the X axis and "program elements" on the Y axis, marking an "X" in some boxes. "This is the chart." Sara looked sidelong at the diagram. "It needs to be 3-D," she sighed. Later, she revised this--"4-D, actually." The whiteboard's two dimensions were not sufficient to capture the complexity of the client's program and predicament. In both cases, rather than seeking to fit client data and consultants' recommendations into standard categories, consultants sought strategies to display the

complexity of client information via their conceptual frameworks, and were rebuffed when the technology at their disposal failed to adequately convey this complexity.

The Causes and Consequences of Customization

In an interview, Ines summarized InsightSolutions' overall approach to customizing its frameworks to client particularities: "there may be structures that we can use from one plan to the next, or the general arc [of a project. But] the specific substance is different, the tone is going to be different." While InsightSolutions re-used a set of general project steps across clients and often applied similar frameworks to client problems, the firm customized the details within these general boxes. Consultants adjusted the tone of conversations and report language, and customized the substance of plans, changing the specific elements and information they included, and customizing these elements to fit client particularities. As a result, Margaux told me, "there are *no standard projects at InsightSolutions"*[69]

Morgan from ArtsNow explained her firm's approach similarly. The firm employed a consistent general process across clients, but within this, each plan was customized: "we can streamline our efforts, say, we're going to do these steps […but] we don't ever do things the same for everyone. […] How we present material, how we workshop, the different types of games we do, it's structured based on who's in the room, and what tensions they're facing." She argued that customization was necessary because of the distinct *people* involved in every client project: "A CEO who's a big impresario personality is going to be very different from somebody who's more operationally minded." An InsightSolutions consultant reinforced the claim that client personalities drove consultants' customization efforts, linking her argument to the characteristics

[69] My emphasis.

of the nonprofit sector: "if you have the perfect business solution and the wrong people, in an environment where you can't go out and get the right people, [your solution will not work]." She suggested that given the under-capitalized nature of the nonprofit sector, nonprofits--and therefore consultants--were stuck with the staff they had, necessitating customization in consultants' processes and recommendations to bring imperfect teams to consensus and move organizations forward.[70] In this context, consultants customized their frameworks to manage clients' perspectives and social situations, and consultants' position within them.

Consultants' approach to customization--filling general planning frameworks with unique details and custom adjustments--was made manifest in the physical characteristics of their tools and frameworks. Consultants made, as this section has shown, ample use of text-filled flowcharts, Microsoft Word tables with bullet-pointed lists, and Excel files containing words and phrases. Words carried the day, rather than numbers--pure numerical representation would be too reductive for this context.[71] This penchant to convey uniqueness by filling frameworks with words, rather than numbers, was exemplified by InsightSolutions' own performance evaluation system, which Ines explained during a whole-staff meeting: "the old evaluation was not aligned with the complexity of the people [at InsightSolutions]. And we had a numerical value for each task, which felt rigid. In the new [system] there are no single numerical evaluations." She explained that InsightSolutions' new word-based performance evaluation system was meant to prompt dialogue between supervisor and supervisee. Consultants, then, customized generalized frameworks and made new frameworks when existing options failed, in order to facilitate

[70] Note that my purpose here is not to evaluate whether this statement and the assumptions it contains are true--rather, I aim to illuminate the rationale contained in this statement about why consultants customized their frameworks to client particularities.
[71] I discuss this further in the next section.

consensus while accommodating and highlighting client particularities and reactions. Consultants correspondingly applied a similar approach to evaluating their own staff.

Summary

In summary, conceptual frameworks made consultants' work easier by reducing the complexity of presenting issues and distinguishing important and irrelevant information in client engagements. Common three-part frameworks used by consultants painted successful nonprofits as agentic, tightly-coupled entities with clear foci and coherent links between their means and ends. Frameworks' embedded meanings derived from the assumptions that informed their creation, and were reinforced by frameworks' technologies of presentation, which privileged linear diagrams and economies of space.

However, while consultants used framework-derived language consistently across their clients, frameworks' uniform messages about the qualities of good nonprofits were complicated by the meanings that emerged in the social practice of their implementation. While the frameworks themselves encoded universalized ideals of good practice, in *using* frameworks with clients, consultants engaged in relational work and invested significant practical effort to customize their frameworks to reflect client nonprofits' unique circumstances and characteristics, and the perspectives and reactions of client representatives. In day to day work, consultants used frameworks to elicit clients' emotions and manage social dynamics, and customized and created new frameworks to generate consensus, accommodate clients' particularities and reactions, and preserve positive relationships. Consultants reacted to the limits of conceptual frameworks' linear structures,[72] changing their frameworks to respond to client needs.

[72] Indeed, this recognition caused some firms to shift from a generalist approach to developing content expertise specific to the nonprofit sector. WorldAdvisors began as a generalist firm with a belief that "the business skills we have learned from [our parent corporate firm] will apply to any nonprofit problem."

In doing so, consultants stopped short of uniformly transferring the ideas embedded in their frameworks to clients' plans, instead producing variation in the management strategies that emerged from client engagements. For example, InsightSolutions recommended a merger for its social services client, a solution that both aligned with the "Theory of the Business" results for the organization and reflected the executive director's pre-existing preference. By contrast, InsightSolutions recommended an expansion strategy for its sports youth development client that incorporated a preliminary program codification step, synthesizing a consultant-driven emphasis on programmatic clarity with the contrasting preferences of the organization's founder and executive director. Additionally, recall that for Historic Park, InsightSolutions backed away from a focused, concise mission statement and offered to add a position statement to the client's plan, in order to allow a more complex identity for the organization. In all three cases, InsightSolutions' ultimate recommendation combined insights from the consultants' theoretical frameworks with the particular perspectives of the clients themselves.

Data as Object and Story

A similar story emerged from consultants' use of data in client meetings. As the last chapter detailed, in strategic planning projects consultants usually conducted a research phase (alternately called fact-finding, document-review, getting-smart) early in each project. In addition to the stakeholder and peer organizational data on which the previous chapter focused, during this research period, consultants also gathered a variety of qualitative and quantitative data about *their clients*, including organizational budgets and financial information, program

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However, as time passed, WorldAdvisors realized that it would not retain its competitive edge and "wouldn't be able to best serve [some organizations] or come up with the best answer" without content expertise. As a result, the firm developed "practice areas" focused on different nonprofit subsectors, that increased in specificity over time.

statistics indicating the number and characteristics of people served, interviews with staff and organizational leaders, and evaluation results and reports.

Consultants analyzed these data using a range of methods. Smaller firms summarized qualitative data and used descriptive statistics to characterize client populations and pick apart organizational budgets, to understand trends over time and what programs contributed to revenues and deficits. Larger and more specialized firms conducted more sophisticated analyses of the relationship between program statistics, financial information, and outcomes, investigating, as a WorldAdvisors example, "how much [a program] costs per unit of impact." Consultants then typically presented these and peer analyses to clients in a "findings meeting" and corresponding report in the first half of their engagement. As an example, in ArtsNow findings meetings, consultants showed clients their own data in new ways. As Arthur explained, "mostly it's taking line item analysis, which [clients are] accustomed to doing, and changing it into line of business analysis, which they're not accustomed to doing." After presenting their findings, in such meetings consultants facilitated groups of client representatives to discuss and interpret consultants' results and consider a set of preliminary options based on these results.

Existing literature (e.g. Hwang and Powell 2009; Prince 2014) would predict that in analyzing data about their clients, consultants rendered clients measurable according to standard metrics and then presented clients with authoritative data using which to make decisions. However, I will show in this section that rather than pushing clients to make decisions based on their analyses, consultants' use of data in client meetings was more nuanced. Endeavoring to maintain what they felt were positive and appropriate client relationships, consultants equalized consultant-gathered data and client perspectives, and used data as an object to spark discussion among client representatives. Consultants also pursued "directional accuracy" and used data in

service of storytelling to funders about nonprofits' value. Together, these practices introduced further variation into the management strategies consultants promoted to clients. Rather than uniformly recommending that clients make decisions based on data, consultants promoted a customized role for data in nonprofits' work. In doing so consultants contradicted their supposed role as homogenizers of organizational practice and instead contributed to inter-nonprofit variation.

Equalizing Consultant Data and Client Perspectives

Rather than presenting the data they gathered as objective representations of nonprofits' reality or suggesting that clients should make decisions based on consultants' findings, consultants framed their data as a complement to clients' lived experience. As an example, we return to Ines' meeting with the health and social services client that began this chapter. To kick off a discussion about InsightSolutions' findings, Ines framed the conversation for the assembled group of client representatives. "You all spent time talking with us, the findings largely reflect those conversations." Her goal for the meeting, she said, "is to make sure we have a shared understanding of what's in the findings document, make sure we got right what we heard from you and what we got from our research about your strengths and challenges." She continued. "The meeting is less about coming to conclusions than being willing to have a discussion and consider some options."

A key element of meetings in which consultants presented data to clients were opportunities for the client to question, refute, and undermine presented analysis. Rather than introducing her research findings as an opportunity for her client to face objective facts, Ines framed her presentation as a chance for the client representatives to check her work, and the purpose of presented findings to spark conversation. FocusImpact had a similar approach. As

Marion described to me, "Midway through [strategic planning], we have a making-meaning meeting. […We say,] 'this is what we're hearing. Is this making sense? Is this not aligning with what you thought? Do you want to challenge this? Do you think we need to talk to someone else to gain a different perspective?" Both Ines and Marion carefully equalized the power of consultants and client representatives and the different information each brought to the meeting. Rather than framing themselves as experts, the consultants stepped into facilitator roles, in which participant views and consultant-gathered data stood on at least nominally equal footing.

Another consultant explained the importance of incorporating clients' perspectives in discussions about data. "The tricky dance is honoring the integrity of the data, but also really hearing and understanding [the client]. They're the ones ultimately running the organization, so how do we help them determine where they're headed?" Consultants considered empathy for clients' predicaments and respect for client representatives as the ultimate experts on their own work to be central in meetings about consultants' analysis, and in consultant-client relationships more broadly.[73] Evan, a senior consultant at ArtsNow, put this inclination more eloquently: "It's important to understand where clients are coming from in their reactions, their resistance to data. It's tribal knowledge, and it works because they have always done it this way--there is legitimacy in that. So the question is how to build a bridge without destroying that [tribal knowledge]."[74] Via this approach consultants marked their relationships with clients as based on respect for the legitimacy of clients' expertise, while also allowing consultants to contribute their distinct

[73] This was not always true--some InsightSolutions clients told me about times they felt firm members did not adequately listen to clients' preferences and instead over-focused on consultants' own ideas.
[74] In equally weighting the data they collected and clients' perspectives, consultants implicitly referenced the "situatedness" of knowledge--that is, the idea that all knowledge is produced via particular social, cultural, and political contexts, rather than one type of knowledge being more "objective" than another (Haraway 1988).

perspectives on clients' work. This approach also helped firms avoid upsetting their clients, which maintained consulting firms' reputations and revenue streams.

This does not mean that consultants did not give clients direct advice, however, or that consultants did not stand behind the importance of their findings.[75] Consultants often saw it as their job to provide candid advice and introduce data-driven decision-making to clients, to improve on what they saw as a decision-making style Arthur described as, "I've always done it this way--I just feel it in my gut." However, consultants attempted to do so in a way that "built a bridge" and *coexisted with* rather than replaced clients' experience-based knowledge.[76] Nancy from WorldAdvisors framed incorporating clients' expertise as adding to consultants' "dataset"--"we pull in [clients'] expertise and their hypotheses along the way, so that the dataset is not just numbers, but also the experience and wisdom from years of work." As part of this, in presenting their analyses to inform client decision-making, consultants integrated the data they collected and clients' lived experiences, and deferred to clients as the ultimate experts on their work.[77]

For example, ArtsNow frequently defined the community relevant to arts organizations as organizations' "primary and secondary market area"--the area from which the client got 75% to

[75] The rest of this chapter will explain how consultants integrated their findings into clients' perceptions. Additionally, in Chapter 7 I discuss lines consultants drew between the approach I describe in this chapter and that of consultants perceived by their peers to rely *too heavily* on clients' opinions, as well as discrepancies in *who* within boutique consulting firms tended to give more direct advice.

[76] Consultants varied in their degree of empathy for this style of decision-making. Frank, a leader of a boutique firm who claimed inspiration from corporate consulting firm Analytico, for example, was more critical. Frank complained of many nonprofits as "evidence-free zones" that "have a terrible time looking hard at themselves." Consulting firms also varied in *how heavily* they weighted client expertise. Larger firms like WorldAdvisors, while incorporating client perspectives in their work, drew more heavily on their analyses in making recommendations to clients than did smaller firms like InsightSolutions. Correspondingly, my argument does not hold in the case of corporate firms like Analytico, a distinction I discuss at length in Chapter 7.

[77] Consultants' tendency to integrate their data and clients' preferences and defer to clients' expertise also tied into their preference for decisive leaders. As the previous chapter made clear, decisive leaders often made consultants' work easier by directing consultant-facilitated discussions toward agreement, thus allowing planning processes to move forward.

85% of its market, and 10% to 15% of its market, respectively. The consultants then used data from a third party to outline the profiles of different sociodemographic groups in these markets. In presenting these data, in many cases ArtsNow focused on whether the sociodemographic groups in the market were wealthy enough to sustain the client's desired programming or new building,[78] rather than whether that programming matched otherwise-defined needs of surrounding communities. In other words, ArtsNow assessed whether there were enough typical arts attendees in clients' market areas to sustain the client's ideas, rather than asking how clients should evolve their programs to attract new audiences. By focusing on the wealth of particular sociodemographic constituencies, ArtsNow allowed clients' assumptions about the value of their services to remain undisturbed.

As another example, when working with health and social service clients, consultants sometimes manipulated the definition of vulnerability to justify clients' choice of target constituencies. In the case of InsightSolutions' health and social services client, Ines and Jim reinforced the client as unique in its focus on serving vulnerable populations, but in order to ameliorate the organization's cash flow problems, defined "vulnerable" as a category unrelated to economics. As Jim explained in a meeting with the client, "we made the observation that you [can] define vulnerable as someone whose health makes them vulnerable--[it is not a problem] to have a huge bank account. So vulnerability around health status, not income." FocusImpact employed a similar tactic in the case of another social services client. Natalia claimed in a meeting with the client that "based on demographic data of [your neighborhood] and four other communities, income isn't the main measure of vulnerability--incomes were less low than we thought, instead age and health are the vulnerability measures." Rather than concluding that the

[78] Wealthy sociodemographic groups were assessed as more likely to attend traditional arts experiences like theaters, symphony orchestras, and museums.

client's audience was *not* vulnerable, which would suggest that the client should consider shifting its focus to another community, consultants instead defined an alternate notion of vulnerability to justify maintaining existing commitments, backgrounding the implications of these alternate definitions by presenting them as matter-of-fact observations.

As part of integrating data and experience in strategic planning, consultants also evaluated the validity of quantitative data based on their professional experience. One day at ArtsNow, Arthur was frustrated--he thought a staff member's work on a client's budget was not credible. "The numbers can't be right," he said, "they don't pass the smell test." During a presentation at a whole-firm retreat Isabel echoed this sentiment, explaining a time she challenged Anna's work: "[I looked at the numbers and said], Anna, I've been there, this doesn't look right. […] If it doesn't look right or smell right, it's probably not right." Arthur and Isabel both described evaluating the validity of quantitative data against their intuition and professional experience via what they called the "smell test," built up over previous projects and lived experience. They questioned numbers that contrasted with their expectations or perceptions of on-the-ground realities, to preempt a situation in which clients might not believe consultants' analyses.

Consultants' practice of combining external data and client perspectives constitutes something of a paradox. According to Porter, the power of numbers as rhetoric lies in numbers' ability to appear detached from their makers' individual perspectives. Via recourse to numbers, scientists are able to attain intra-group consensus because the terms of engagement are so carefully constrained (1992:647). However, in discussions about data in client meetings, consultants to nonprofits *added back* the individual perspectives that quantified information stripped away. Consultants carefully scaffolded discussions to integrate data into intra-client

conversation such that clients' perspectives could coexist with consultants' data, rather than the latter displacing the former.

Using Data as an Object

Relatedly, consultants also used *data as an object*[79] in meetings with clients, to intervene in group social dynamics and spark and shape discussions. FocusImpact consultants' approach to discussing the firm's proprietary assessment tool in client meetings is a helpful example. In much of its nonprofit strategy work, FocusImpact used a proprietary, statistically-validated survey tool that the firm developed as part of a long-ago client project. The tool applied an algorithm to client responses and provided organizations with performance scores on several scales, as well as recommendations based on these scores. Results fed into a database that contained the responses of thousands of survey-takers. However, FocusImpact staff repeatedly stressed that the tool's value lay not in these scores, but instead in the client conversation they provoked. Designed as a vehicle for quantification, the survey was, in day-to-day-practice, used as a catalyst for interpersonal discussion. As Chelsea, a midlevel staff member, explained,

> I used to work in youth development, and I always thought the intervention itself […] was less important than just giving kids a place to be. […] I feel a little bit like that with the survey. The algorithms are powerful, but the process of assessing your capacity and having a chat about it, that's where the magic happens.

She explained that while FocusImpact used to use its survey tool as a standalone service, "you take it, you get a report, and see you never," the firm had realized in recent years that it was the post-survey conversation that really mattered--the tool's power lay in its ability to spark

[79] The notion of "data as an object," is related to but distinct from theories of boundary objects (Star and Griesmar 1989)--while in both cases particular technologies or objects facilitate interpersonal communication, boundary objects function to allow communication between disconnected parties in which each party retains a distinct definition of the boundary object and its importance. By contrast, in my theory of "data as an object," data are used to spark reactions and catalyze intra-group discussion.

discussion between consultants and client representatives, rather than in the specific results it generated. As Chelsea put it, “it’s not really just, collect data and analyze it for what it says. It's about taking that and twisting it and contorting it into a way that helps people make decisions.” FocusImpact consultants “twisted” and “contorted” results from their tool in order to spur intraorganizational client discussion and decision-making.

Tina, another midlevel staff member, demonstrated this approach during a post-survey debrief session with a housing services client in another state. The client representatives, two middle-aged men, joined by phone. For each section of the survey report, Tina asked the clients “if anything resonates, is affirming, surprising?” The men gave short, bland answers, clearly not engaged, and Tina continued trying to draw them out. “For the ‘decision-making tools,’ section you said you think you’re getting too much credit [in the algorithm] for having a strategic plan. Do you leverage other things to help you make decisions?” Rather than engage in conversation, the men seemed more interested in taking the survey at face value. “Your system is very accurate.” Tina made a face and offered an alternate explanation--“I think I’m hearing a story as I move through the report. It seems like the service you’re providing is working really well, so you’re building your infrastructure to do that effectively.” For FocusImpact, the focus of its survey tool was not the tool itself--rather, consultants used the tool and the reports it generated *as objects* to prompt clients to engage in discussion and craft stories about their organizations.

Marcie, leader at a small firm, explained the mechanics of this approach. “The questions we usually ask--what surprised you, what struck you […] we worry less about the details and more about the big picture--pushing people to think about their assumptions, seeing that information doesn’t necessarily match up with their assumptions.” As Marcie suggested, consultants focused less on convincing clients of their specific findings, and more on using data

as a tool to help clients notice where assumptions might differ from external information. Nancy explained WorldAdvisors' similar approach: "[Through facilitation] we drive meetings towards specific outcomes and around specific topics, but the art of it is leaving room for folks to grapple with the hard choices and hard truths that they need to fully internalize." Marcie gave an example: "This organization thought it was doing fine. We do good work, yadda yadda, but if you do a deeper dive, it has 25 disconnected parts. There is a possibility that the board won't [be motivated to change this]. [If so], we have to take people where they are." As Marcie explained, in using data as an object, consultants focused on developing a shared understanding of the general issues revealed by consultants' research--for example, a lack of integration between organizational subunits--rather than adhering to the details of their findings. In this process, consultants tailored their approach to their assessment of the client's readiness to receive challenging information, to maintain positive client relationships.[80]

As part of building this shared understanding, consultants sometimes *engineered* data to direct clients' discussion. Natasha described an activity ArtsNow designed for a client, using a set of ideas for the organization's future that client representatives generated earlier in the strategic planning process. Each idea was made into a card with several components:

[80] Avoiding alienating clients was also an important strategy to preserve consulting firms' reputations.

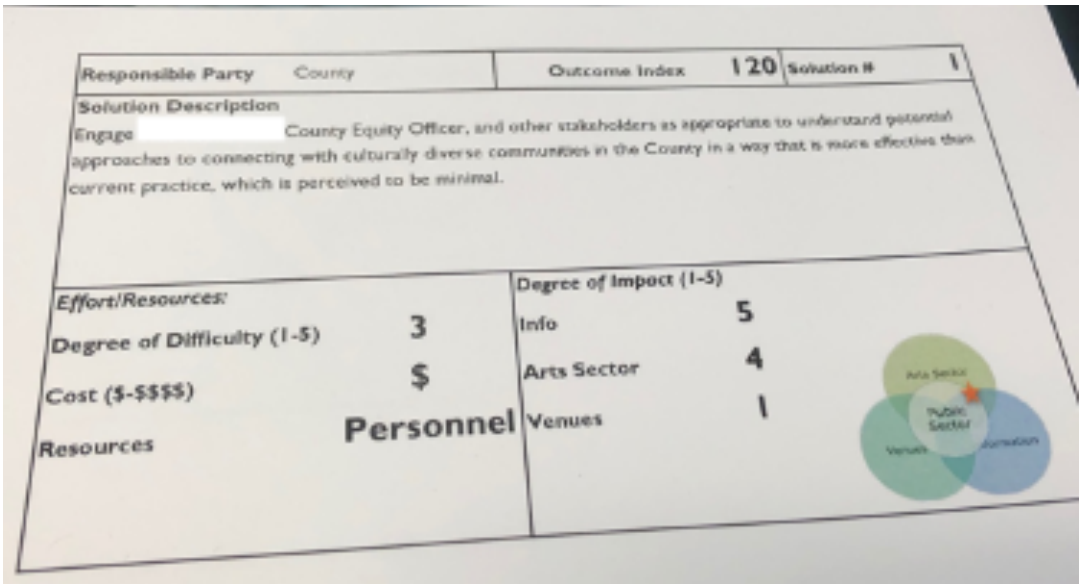

Illustration 14: Engineered Data

On the bottom left, the consultants allotted each idea a score for "Degree of Difficulty," "which we gut decided--what are they trying to do and how hard is it?" Below that, they listed the cost associated with the idea, from 1-4 dollar signs, "where '$' is a little money, and '$$$$' is a building." On the right side, the consultants gave their "gut assessment" of the idea's potential impact (a scale of 1-5) on each of three categories, which they had created based on their research. Natasha explained that the team then took the numerical ratings on each card and calculated an "impact index" for each idea, which served as the basis of a game ArtsNow designed for its client. In this game, client representatives were to curate sets of ideas such that the impact index exceeded a set minimum.

The point of this exercise, Natasha explained to me, was to force her client "to think about the effort and resources needed to make an impact." As Arthur explained, "there's no good logic in the points [we assigned to things], but we wanted a way to avoid them saying [we want] everything." The ArtsNow team collapsed variation and assigned numerical values to ideas

"based on gut feeling" in order to force its clients to compare available options according to their relative cost and benefit. This reduction functioned, in ArtsNow's design, to spur discussion among client representatives to create scenarios for the organization's future.

Zoe, another ArtsNow staff member, explained that ArtsNow used such quantitative information as a "reality check" for clients. ArtsNow, she said, tended to bring in market and financial information halfway through strategic planning processes "when we want [clients] to understand what their desires look like in reality." She continued. "We're there to provoke conversation, and to do a reality check. […] But we're also not there to squash dreams." A client workshop served as an example. The ArtsNow team, she explained, gave each client representative "three poker chips, and we said, 'based on all that you've learned, pick the top three things you think have to happen [at your organization].' Then Brian and I went around, and we put red and black chips out to indicate, 'from the things you voted on, here are the money makers, and here's what you're going to need to raise money for.'" She explained that the activity prompted group dialogue, giving client representatives something they could "point to" in decision-making discussions.

Like in the previous example, Zoe and Brian used data to focus clients' discussion and funnel group decision-making toward a cost-benefit approach. Layering financial information atop client aspirations prompted clients to consider the budgetary implications of their dreams. As part of this, consultants carefully strategized about when and how to introduce data to clients, to avoid the perception of "crushing their dreams." They also used emotionally-charged language ("dreams") to highlight the importance they attributed to clients' ideas and consultants' desire to avoid upsetting client representatives by displacing their aspirations. As Margaux from InsightSolutions put it, working on the structure of a client deliverable document, "I don't like

the bait and switch of putting assumptions and mission first and then ruining their dream with the […] data." While consultants used data to influence clients' discussions, they again did so in a way that ensured that their data and clients' preferences could coexist, using data to *edit* but not contradict client ideas and thus maintain positive relationships with their clients.[81]

Directional Accuracy

Consultants' use of data as an object also influenced their approach to data analysis. Ines, describing InsightSolutions' approach to research, called it "not quite cocktail napkin--more informed than that." Nancy from WorldAdvisors explained her firm's related strategy.[82] As part of WorldAdvisors' "hypothesis-driven" approach, to analyze clients' data WorldAdvisors consultants pursued *"directional accuracy* instead of *accuracy accuracy."*[83] She explained, "we use an 80/20 principle--can you get 80% of the answer with 20% of the possible analyses, to know we are on the right track? […] With 15 interviews we get directionally the same set of findings that [we would get if] we interviewed every [leader in this area] in the state." She explained that via this "80/20 principle," WorldAdvisors ensured that its research and analysis procedures were fast and efficient, which simultaneously supported consulting firms' bottom lines and aligned with consultants' tendency to use data as an object.

Heidi, an evaluation consultant at a large nonprofit firm, explained her view of the mechanics of this approach. Heidi argued that strategy consultants in her firm "are smart with

[81] Again, this strategy also helped consultants avoid frustrating their clients, which helped the former protect their reputations and bottom lines.
[82] Note that while WorldAdvisors' and InsightSolutions' research processes were similar in that they made use of similar types of data (e.g. interviews, program statistics, budgetary information) and both tailored research processes to clients' interests and budgets, these two firms also differed in significant ways. These differences are discussed in Chapters 2 and 7.
[83] My emphasis.

pattern recognition, but won't be critiqued for how many data points they have."[84] She suggested that clients did not hold strategy consultants to the same standards of research quality to which she was subject as an evaluator,[85] leading strategy consultants to focus on quickly identifying patterns and moving on. Indeed, some consultants argued that it was *because* of the directional accuracy of their research that they used data as an object. As Jim from InsightSolutions put it, "the number of people we interview is too small and the selection of them is too arbitrary to think that talking to twenty people about your organization is somehow quantitatively and statistically rigorous. It's a qualitative assessment that's important in what it makes you think about or discuss." As Jim put it, due to the constraints of consultants' research processes, prompting discussion was the only appropriate use of resulting data.

The directional accuracy approach, however, could backfire when it conflicted with clients' expectations.[86] One afternoon in his office, Jim told me about a frustrating experience with a former education-focused client. After collecting data, Jim explained, the InsightSolutions team met with a group of client representatives "to present what we'd learned and ask questions." However, the client was unhappy with the quality of InsightSolutions' research. "About three weeks later we got, in essence, fired. They wanted the answers, and had no clarity that [our findings were] preliminary." While InsightSolutions' findings were, as Jim put it, "meant to frame [client representatives'] discussion," the client expected a polished research product. In this case, the client representatives did not understand or agree with the notion of

[84] In the large firm context, Heidi suggested that these practices were guided by her colleagues' business school backgrounds and experience in corporate consulting.
[85] This ties into my discussion in the previous chapter of consultants' quick synthesis process. Evaluation consultants, however, also adjusted their methods based on client representatives' particularities.
[86] I discuss the source of clients' expectations in Chapter 7.

using data as an object to catalyze discussion--in light of what they viewed as shoddy research that fell short of an answer,[87] they fired their consultants.

To recap, to save time and resources, consultants focused on getting the "directional" right answer rather than conducting detailed or extensive analyses. They did this by quickly identifying patterns that emerged from collected data. Such directional accuracy folded directly into consultants' use of data as an object. Rather than recommending that clients make decisions based on their analyses, consultants used data to catalyze client discussion, mixing their findings with client representatives' perspectives. In this context, the rigor of consultants' results was less important than the general direction to which consultants' analyses pointed.[88]

Telling Stories with Data

Consultants sometimes used data about the impact of clients' programs--program monitoring or evaluation data, gathered by consultants or clients themselves--distinctly than they did financial and stakeholder-related data (i.e. data from interviews with client executives). Specifically, consultants advocated that clients use data about programs' social impact in *the service of storytelling*--to convince funders of clients' worthiness of funding by using evaluation results to "tell funders a story."[89]

Natalia, a consultant at FocusImpact, illustrated this practice on a client phone call, suggesting that the client needed "to do some formal work to gather feedback about your work

[87] It is important to note that I cannot verify whether InsightSolutions' work *was* shoddy in this case, as I did not directly observe the project process for this client. However, the directional accuracy approach I described in this section provides insight into why some clients were dissatisfied with consultants' research quality.
[88] I do not mean to suggest that this is an appropriate or correct approach to research. The previous chapter, for example, extensively discussed how consultants' research processes privileged certain perspectives and excluded others.
[89] The broader power dynamics between nonprofits, consultants, and funders are elaborated in Chapter 7.

and program, and then use that to tell the story to funders." Another consultant similarly claimed that evaluation helped nonprofits publicly champion their work: "[The client] has no evaluation processes. They need to be able to validate their model in a way that can be shared and championed more publicly." Evaluation data, she suggested, was a key component in nonprofits' self-advertisement. A different FocusImpact staff member similarly framed evaluation data as "receipts"--"Do you know who you are [as an organization], and do you have the receipts? Do you have the program and organization data to be able to tell a story?" In this consultant's telling, nonprofits should use evaluation results to construct compelling stories about the value of their programs, which they could then use to pursue funding.

For consultants, embedding evaluation data in larger narratives[90] about nonprofits' work was the key to telling effective stories to funders. On a client call, Natalia from FocusImpact called this task "translating data into stories." Judy, a partner at a firm that specialized in economic impact analysis, gave me an example of this process. After measuring the impact of a client's program using counterfactual analyses, she and her team "did a visual four-pager that was like, 'here's background on the program, here's what our analysis was, here's the outcomes,' essentially to paint the picture [of], 'this is why you should fund this program.'" After generating quantitative data about programmatic impact, Judy embedded these data into a visual and narrative-based report meant to help win funding for the client.

Evaluation data, then, was framed by consultants as ballast in narratives meant to convince funders of nonprofit organizations' value. This contrasts with how consultants used financial and stakeholder-derived data to catalyze discussion--in addition to using evaluation

[90] Some qualitative evaluation data, of course, took the form of narratives that told stories of participants' experiences in clients' programs. Here I intend to reference not these narratives, but instead larger narratives about the history, mission, and value of client nonprofits.

data to spur critical conversation, consultants suggested that nonprofits use these data to craft *stories* of nonprofit worthiness to pitch to funders. However, like in consultants' use of data as an object, evaluation results were not sufficient to convey the whole picture of a nonprofit's value--as consultants advised their clients, these data needed to be "translated" and embedded within broader narratives in order to (supposedly) influence funders' decisions. While the story depended on the data, the data also needed the story in order to impact decision-making.

The Causes and Consequences of Data as an Object

In interviews, consultants told me that these practices around presenting findings to clients--equalizing data and client perspectives, data as an object, directional accuracy, and data in the service of storytelling--stemmed from the nature of nonprofit work. As Abigail, a former employee of a large nonprofit firm, put it, in the nonprofit sector, organizations "have to think about social capital, not just monetary capital. We knew that [we would have] tougher conversations--people have their pet interests, it's not the same as a for-profit company saying, 'nope this isn't working, we are killing this global health initiative'--it doesn't happen like that." She suggested that the dual bottom lines in nonprofit work, financial success and social impact, complicated consulting processes, and that there existed multiple bases of decision-making in the nonprofit sector--people and their "pet interests," and impact or financial results.[91] Based on this perception, she said, her firm focused on hiring staff with backgrounds in nonprofit work and that had complementarily dual skillsets--both high "EQ" (emotional intelligence) and high "IQ"

[91] My intent here is not to evaluate whether Abigail's characterization was correct; rather my aim is to point out her justification for consultants' approach to using data in their work. However, in my fieldwork I did encounter such "pet interests"--in one case at ArtsNow, Arthur complained to me that his data were powerless against client representatives intent on saving an aging building: "We can prove it 'till the cows come home--that the building is out of date--but the people who want to save it won't care."

(intelligence quotient). As she put it, the firm hired "people who were analytical but could [also] understand how to persuade and interact with people not just based on numbers, but peoples' interests and perspectives, good facilitators of group brainstorming." According to Abigail, the ability to interact with clients based both on quantitative data *and* individual perspectives was key to success as a consultant to nonprofits. An InsightSolutions consultant phrased this skillset more succinctly--she called it "having both the soft side and the hard side.[92] This dual orientation, Abigail argued, stemmed from the nature of nonprofit work, where personalities, emotions, and interests coexisted with quantitative information.

Lucy from FocusImpact reinforced the notion that the ability to manage people was uniquely important in nonprofit work. She told me that while serving on a panel for college students about consulting careers "with a bunch of [corporate management consulting] people," only she claimed that "people skills" were important in consulting work. "Everyone else said that it was hard analytics--you really have to be good with data." She wondered to me whether this discrepancy stemmed from the fact that she was the only person on the panel who worked with nonprofits, where, she told me, "people skills" were uniquely important.[93] Building on this idea, a former FocusImpact employee explained the situation more functionally: "[in the nonprofit sector] you never have enough information, and you need to tell people what to do despite this […] [so] it's about sussing out values, not pointing to a survey that says '75% of people think this.'" She claimed that consultants' dual attention to data and clients' perspectives stemmed from a lack of available data about nonprofit work, which necessitated "filling the data gap" with personal values, a different basis of decision-making. In this real or perceived context,

[92] I unpack this characterization of nonprofit consultants' skillsets and motivations in the next chapter.
[93] She also wondered if the discrepancy was additionally related to the fact that she was more senior than the other panelists.

consultants equally weighted data and human experience in meetings with clients and used data as an object to prompt group discussion.

Like in the case of conceptual frameworks, consultants' approach to data as an object was made manifest in the infrastructure they used to do their work, and in their definitions of successful projects. As I have shown in this chapter, consultants used a confounding combination of analog and digital technologies in their work--Zoom and printed emails, data visualization software and poker chips. As Arthur put it while interviewing a candidate for a job at ArtsNow, "we do a lot of things in a hybrid technology-manual way."[94] While central to consultants' work, this hybrid approach at times caused embarrassment--during one of InsightSolutions' frequent email outages, Margaux told me about a meeting with a university client in which "all the faculty whipped out laptops, but I had a notepad." She feigned slowly pulling a notepad from her bag, making an embarrassed face. Samuel echoed this sentiment. He brought a thick folder of printed material to a meeting at InsightSolutions about Microsoft Excel data analysis, commenting that when he was new to the firm, he was surprised to see everyone working on paper. Consultants' integration of data and discussion was reflected in and reinforced by the technology they used in their work--Excel to analyze budgets and program statistics, and notepads to capture clients' opinions and perspectives.

Consultants' dual focus on data and discussion was also reflected in how they described successful projects. In the words of Frank, a partner at a small firm, there existed two kinds of successful projects--those that caused clients to increase their fundraising performance and impact, and those that "are about bringing an organization around a common purpose […that

[94] Consultants' hybrid analog and digital technology usage echoes Vertesi's (2014) notion of "seams," which she defined as overlaps between heterogeneous infrastructural systems, and her analysis of actors' creative work to manage heterogenous infrastructural environments to communicate specific desired messages and produce an experience of "seamlessness" for themselves and their colleagues.

shared focus] is often a more important outcome than anything else." Frank articulated two interlocking definitions of successful strategic planning--if his client became more performance-oriented, *or* if the organization achieved internal consensus. To reach such successful outcomes, consultants equally weighted data and client perspectives and mobilized data as an object, introducing the concept of data-driven decision-making to clients while actually *using* data to catalyze discussion and debate.

Summary

By equalizing data and client perspectives, using data as an object to catalyze group discussion, pursuing directional accuracy and using data in the service of storytelling about nonprofits' value, consultants again introduced variation into the recommendations they delivered to clients. Consultants did bring quantification and measurement to nonprofit work, gathering both qualitative and quantitative data about their clients and advocating that clients involve data in their decisions as a "reality check." However, by intentionally integrating numbers and perspectives, data and discussion, into meetings with clients, in practice consultants valued both data and clients' lived experiences in determining the right path forward for each client, maintaining positive and appropriate client relationships in the process.

As a result, rather than disseminating data-driven decision-making as good practice across clients, consultants promoted a heterogeneous, customized approach to data usage in which both consultants' analyses *and* clients' unique perspectives and group dynamics jointly determined the solutions that resulted from consultant-facilitated projects. For example, in the case of InsightSolutions' health and social services client, despite the fact that the consultants' analyses showed that the client's home care program was not viable, the client representatives

were too attached to the program to let it go, and the program was included in the client's eventual merger plan. Similarly, while InsightSolutions' research suggested that Historic Park could not make substantial revenue by continuing its historic function as a burial ground, client representatives believed otherwise, and a columbarium was included in Historic Park's final strategic plan. This finding aligns with DiMaggio and Useem's (1980) argument that arts organizations rarely used the results of commissioned research to make decisions--such research had only a marginal or indirect impact on decision-making, and often served to identify problems, rather than solve them (200-204).

Consultants attributed their practices to the nature of the nonprofit sector, and their approach was reflected in the digital and analog tools they used in their work. However, as I showed in this section, the result of consultant-facilitated, data-*inclusive* decision-making for each client depended on both the social relations at play, and the characteristics of consulting work. The particular ideas of and dynamics between the people in the room influenced how consultants used data and the solutions for practice consultants produced, as did consultants' practices to ensure positive client relationships and win repeat business.[95]

Conclusion

To summarize, consultants brought tools into nonprofit work--conceptual frameworks and data about client organizations--that were, on the surface, designed to remake nonprofits in the image Meyer and Bromley (2013) described--purposive actors with clear identities and narrow foci, that engaged in agentic decision-making and built measurable means-end

[95] As I discussed in the previous chapter, nonprofits' rigid budgets for consulting also contributed to the variation produced by consultants' approach to generating and using data in client engagements. The limited money nonprofits had to invest in consultant-conducted research led in part to consultants' "directional accuracy" approach.

relationships between resources, activities, and outcomes. By categorizing clients' problems and synthesizing information using conceptual frameworks, and in introducing data-driven decision-making to nonprofits, consultants disseminated consistent *language* across clients. Consultants' work also appeared to support the idea that boundaries between sectors are dissolving in a globalized world (Meyer and Bromley 2013) and the notion that consultants serve as agents of inter-organizational homogeneity in managerial practice (DiMaggio and Powell 1983).

However, in the day-to-day interactions by which consultants *applied* these tools in meetings with clients, this image of uniformity fell away. Consultants used frameworks to manage the people and social dynamics of client organizations and consultant-client relationships, and customized and created new frameworks to reflect clients' particularities. To maintain client relationships that consultants felt were positive and appropriate, consultants also used data as an object to catalyze intra-organizational discussion, "smell checked" data against lived experience, pursued "directional accuracy," and used data in the service of stories meant to convince funders of nonprofits' value. Via these practices, consultants intentionally mixed standard tools with clients' particularities and perspectives, producing a proliferation of individualized solutions in their recommendations to clients, rather than transferring their tools' consistent ideas into clients' plans.

This story illuminates the variation produced in encounters between management knowledge and new contexts, challenging scholars' ideas of consultants as "carriers" of management knowledge (Faust 2012). Other scholars (e.g. Christin 2018; Sturdy et al. 2009b) showed that ideas and technologies can take on distinct meanings in different institutional contexts. However, in the case of consultants to nonprofits, the particular character of consultant-facilitated variation was tuned through day-to-day practice, in which consultants mixed their

tools with clients' unique characteristics to produce different managerial recommendations for different clients. This finding aligns with Barman's (2016) analysis of "Social Return on Investment" measurement in impact investing. Barman found that "social value" was not defined consistently by professionals in the field. Additionally, tools to measure social value did not linearly implement their creators' ends--the people crafting measurement tools embedded their interpretations into the tools, at times detaching tools from the principles behind their creation. Similarly, the case of consultants to nonprofits shows that professionals can *use* consistent tools in ways that create variation within a single institutional context, undermining these tools' supposed homogenizing effects.

This chapter correspondingly contributes to literature on classification and data in STS. Most studies of scientific data and classification systems (e.g. Bowker and Star 1999; Gitelman ed. 2013) focus on how standard categories and seemingly objective data are in fact socially constructed and full of assumptions. Such studies also analyze how categories and data, once stabilized, shape the people and situations to which they are applied--they do not consider standard categories as malleable and data as available for contestation by everyday people. This chapter demonstrates that such contestation and malleability is possible, and explains both the practices by which consultants customized previously-stabilized frameworks and turned data into discursive objects, and the impact of this process for the client solutions consultants produced.

Chapter 6
How to Be a "Nonprofit Person" in Consulting
Enacting Solidarity in Client Relationships

Consulting firms like InsightSolutions, FocusImpact, and ArtsNow operated at the border of two sectors. Incorporated as for-profit businesses, these firms were largely staffed by professionals with nonprofit sector training and experience.[96] This situation created a puzzle for consulting firms--how could consultants both advance their firms' bottom lines *and* act in accordance with their training and backgrounds? This chapter resolves this puzzle by exploring how consultants chose appropriate actions and legitimated these actions, both to their nonprofit clients and to consultants themselves. Building on my discussion of consultant-client relationships in the previous chapter, in this chapter I show that consultants engaged in ongoing work to define and maintain relationships of genuine support and solidarity with their nonprofit clients and with each other. Specifically, using a relational work framework (Zelizer 2010), I analyze three interlocking sets of practices--identity talk, moralizing money, and redefining consulting as carework--that consultants used to define the actions and transactions appropriate to their relationships with clients, and, in doing so, legitimate their work in the nonprofit sector.[97]

I show that, via these practices, consultants emulated what they perceived to be nonprofit characteristics and practices in their own work, often acting in contradiction to their firms'

[96] Note that some consulting firms that serve nonprofits are incorporated as nonprofit organizations; this chapter focuses specifically on those firms that are incorporated as for-profits or B-Corporations. Additionally, the arguments in this chapter are derived primarily from fieldwork at ArtsNow, InsightSolutions, and FocusImpact. In interviews, consultants across the spectrum from very large firms to sole proprietors engaged in identity talk, and many sole proprietor consultants and those in boutique firms spoke about overrun and *pro bono* work. However, the detailed conversations about pricing, billing, work allocation, and profit that I leverage in this chapter were enabled by direct observation of consultants' work. I am unable to comment on whether overrun problems extended to large consulting firms; given that many of these firms have additional sources of funding (i.e. from affiliation with corporate consulting firms), I suspect that they may not.

[97] I presented an early version of this chapter at the 2019 American Sociological Association conference in New York City.

financial best interest and replicating common nonprofit problems in the process. I call this process *mirroring* nonprofit practice. While this dissertation's previous chapters showed that consultants did not consistently rationalize nonprofits in a manner predicted by the literature (e.g. Hwang and Powell 2009), I argue in this chapter that consultants *did mirror nonprofit work* in their own practice. While consultants did not make nonprofits more like businesses, they did make consulting firms more like nonprofits. This finding contributes a new perspective to literature on consultants' and other intermediaries' role in institutional diffusion. As part of this dissertation's larger argument outlining a complex role for consultants in institutional diffusion, this chapter argues that in the course of consultants' work, diffusion occurred in *reverse*--not only from the agent to the object of diffusing ideas, but also from the object to the agent. Consultants did not only diffuse ideas into nonprofit organizations; consultants also replicated nonprofit practices in their own firms.

I begin by outlining relevant literature on consulting as a profession, the nature of consultants' expertise and strategies for legitimating that expertise, and the character of consultant-client relationships, arguing that the literature on consulting makes problematic assumptions about the nature of consultant-client relationships and thus neglects to investigate how consultants choose behavior appropriate to those relationships. I describe the theoretical frameworks, Viviana Zelizer's relational work approach and Erving Goffman's work on everyday role performance, that I use to analyze how consultants, operating in for-profit firms, chose appropriate actions and legitimated those actions in the nonprofit context. I turn next to the three specific sets of practices via which consultants defined and maintained relationships of support and solidarity with their nonprofit clients--"mission-oriented" identity talk, moralizing money, and redefining consulting as carework. Note that the purpose of this chapter is not to

evaluate whether consultants' statements about their work were true--instead, the chapter focuses on highlighting *how* consultants talked about their work and expertise. Additionally, by calling identity talk, moralizing money, and redefining consulting as carework "practices," I mean to highlight them as everyday, seemingly natural and common-sense. While consultants sometimes strategically engaged in identity talk, for example, they also naturally gravitated toward this type of speech in explaining their work. I argue that via these practices, consultants *mirrored* perceived nonprofit behavior in their own work, inadvertently undermining their firms' bottom lines and replicating common nonprofit problems in their firms. I conclude by summarizing the argument and its contribution to theories of institutional diffusion.

Consulting as Profession: Expertise, Relationships, and Legitimacy

Legitimating Consultant Expertise

The field of management consulting is acknowledged to lack standard markers of professions, including a uniform credentialing system and standard knowledge (Abbott 1988). Kirkpatrick, Muzio, and Ackroyd (2012), citing Kyrö (1995), summed this up: "almost everywhere, consultants lack a common stock of knowledge, formal education, and legal closure" (6). In this context, studies of the development of the management consulting field have focused on the strategies used by consulting firms to legitimate their expertise. As the management consulting industry emerged, in pursuit of legitimacy consulting firms structurally modeled themselves after other major professional service organizations, namely accounting and law firms. In tandem, firms attempted to associate with the prestige of MBA programs from which they recruited entry-level staff (Kirkpatrick, Muzio and Ackroyd 2012:6). Regarding the nature of consultant expertise, corporate management consulting firms have focused on "the

acquisition of 'in-demand expertise,' such as new techniques or management fashions, and the use of 'rhetorical strategies' to stimulate new demand" (Fincham 2006:23). Additionally, in the absence of common markers of quality, extant literature about corporate management consulting elaborates the use of network-based trust to overcome the risk of hiring consultants--clients rely on ties to trusted others to legitimate using particular consultants (Faust 2012).

Building and Maintaining Consultant-Client Relationships

Relatedly, scholars have analyzed consultants' rhetorical talents in winning clients' trust (Harrington 2016), persuading clients of the necessity of consulting services (Fincham 1999) and reframing client problems to fit standard solutions. As Sturdy (1997) showed, key to consultants' ability to apply their expertise is "active listening" to how the client is describing his or her problem, who is in control, and whether any hidden agendas exist. Based on this observation, the consultant guides the client to the consultant's preferred solution within the consultant's wheelhouse. Similarly, extant work points to the centrality of "impression management" in consulting work, or consultants' efforts to control the narrative and maintain positive client relationships. Such impression management is especially important given that the results of management consulting engagements are notoriously difficult to measure. Given this, relationship quality and reputation often serve as stand-ins for consultant quality (Ernst and Kieser 2002; Harrington 2016). As such, consultants pay close attention to building and maintaining positive client relationships.

In this context, extant literature suggests that consultants' preoccupation with client relationships is primarily motivated by a desire for economic gain: "relationships with clients are foremost an opportunity to redefine locally perceived problems in such a way that they fit with

the prefabricated, packaged consultancy solutions, and to create new demand for their services by defining new problem areas, which, in turn, fosters long-lasting and repeated assignments" (Ernst and Kieser 2002; see also Jung and Kieser 2012). As such, this literature, on the whole, seems to rely on an assumption that consultants are primarily motivated by making money, reproducing a rational maximizer paradigm shown to be problematic in economic sociology (e.g. Zelizer 2012). Scholars have paid little attention to the nature of client-consultant relationships or how consultants choose actions that are appropriate to their relationships, and instead focus on consultant strategies to convince clients to hire and trust them, toward the ultimate goal of maintaining and expanding demand for consulting services.

Some scholars acknowledge the limiting nature of this assumption. Sturdy et al. (2009b) illustrated the complexity of client-consultant relationships by showing how personal and social ties sometimes exist or develop between consultants and clients, and that client perspectives are not unitary--consultants may have multiple clients with differing ideas within a single client organization. Indeed, the assumption that consultants are primarily self-interested is particularly suspect in the case of consulting to nonprofits, in which many consultants working in for-profit consulting firms came from careers in the nonprofit and public sectors. As I will show in this chapter, in this context consultants to nonprofits framed consulting as carework (England 2005), highlighting the helpful and supportive nature of their work, and strove to build and maintain genuinely supportive relationships with their nonprofit clients.

This question of how consultants choose appropriate actions and legitimate these actions in their relationships speaks to a larger question of how occupations that lack institutionalized norms establish behavioral expectations. Some scholars have written about occupational mandates, "the internally shared understanding and the externally perceived right to define

proper conduct [in an occupation]," (Fayard, Stigliani, and Bechky 2017; citing Hughes 1958). Occupational mandates function to generate demand among potential clients, facilitate internal decision-making, and support the formation of occupational solidarity. Van Maanen and Barley (1984) similarly wrote about occupational communities as groups of people "whose identity is drawn from the work [and who] share a set of values, norms, and perspectives that apply to but extend beyond work-related matters." Such occupational communities, they wrote, create standards for appropriate and inappropriate behavior, and produce "compelling accounts" of the value of these standards. Relatedly, as Polletta (2012) showed in the context of social movement organizations, occupational settings that lack institutionalized norms depend "on a sophisticated set of normative understandings that accompany the formal rules, a kind of etiquette of deliberation […] by routinizing and domesticating attendant emotions, it generates trust in the process, its outcomes, and its participants" (16). Together, this work points to relational understandings that guide work in occupations that lack typical markers of professions.

Theoretical Tools

To uncover how consultants defined their relationships with client nonprofits and selected behavior appropriate to those relationships, I draw from Viviana Zelizer's research program on relational work in economic sociology (See Bandelj (2020) for a comprehensive review). In a 2010 compilation Zelizer detailed how, by engaging in economic action, people construct and maintain meaningful social relationships, erecting boundaries around these relationships, establishing the particular understandings that are relevant to the relationship, and defining which kinds of transactions and transaction media are appropriate. Rejecting previously dominant notions of economic transactions as uniform and devoid of cultural meaning, Zelizer's

body of work revealed that in economic activity people engage in crafting and maintaining particular meaningful social relationships. By analyzing the relationship between the meaning of an economic transaction for the maintenance of particular social ties and decisions as to which transactions and media are appropriate in marking that relation, Zelizerian analysis illuminates the distinctive understandings that operate within the relation. Note that we would expect relational work of this nature to occur across consulting to corporations and to nonprofits--indeed, relational work happens in most if not all settings of economic exchange and work. In the specific case of consulting to nonprofits, a relational work approach facilitates attention to how consultants defined their relationships with client nonprofits and then articulated unique, *relationally-specific* notions of what was appropriate in their own behavior and relationships with clients.

In analyzing how consultants decided what language and behavior were appropriate in their relationships with nonprofit clients, I also draw on Erving Goffman's classic scholarship on social role performance ([1956] 1973). Goffman argued that in everyday life, people perform roles that they perceive to be appropriate in particular social settings. In a given setting, people inherently construct a definition of the situation which they use to determine the appropriate role, drawing on operative societal norms and expectations to figure out the right way to act. In doing so, they reference institutionalized expectations of appropriate or exemplary behavior in a given setting, following what scholars have called a "logic of appropriateness" (Olsen and March 2004). As part of this role performance, people project a particular self-concept--their identities. As such, Goffman argued that identity is not organic or given--rather it is situationally dependent and produced in collaboration with others. As they perform their roles, people engage in impression management to ensure that others perceive their behavior to be appropriate and

consistent. Perceived contradictory behavior, Goffman argued, is dangerous in that it can cause embarrassment and interrupt interaction, as well as threaten or destabilize actors' self-concepts. People also at times engage in "role distance," to separate themselves and their identities from a role about which they are ambivalent (Goffman 1961).

Many other scholars have since extended Goffman's analysis. Hochschild (1979) theorized social rules that govern how people manage what feelings and emotions are appropriate in different settings, and Lichterman and Eliasoph (2014) argued that key to being perceived as acting appropriately in a particular setting is recognizing and emulating speech norms, "shared assumptions about the appropriate speech genres for a setting and the appropriate emotional tones to display there." Note that the work of Goffman and his contemporaries primarily focused on the self while Zelizer's relational work framework focused on interpersonal relationships, lenses that cannot be assumed commensurate (Zelizer 2006; Tilly 2006). I combine these literatures to identify the norms and expectations that consultants drew on in endeavoring to act appropriately with client nonprofits and other consultants, and how these norms manifested in consultants' expressed identities and in the words consultants used and behavior they exhibited in their work with nonprofits. As I will show, as consultants worked to define relationships of support and solidarity with clients, the actions they undertook to mark such relationships *mirrored* nonprofit practice, inadvertently reproducing common nonprofit problems in consulting firms. With this literature as context, I now turn in earnest to my argument.

Between Two Sectors: Consultants at the Crossroads

Firms like InsightSolutions lived at the border between two sectors--incorporated as for-profit businesses, they served nonprofit organizations. This at times created tension for the consultants working in these firms. As an InsightSolutions staff member put it, "everything has

two sides. It's a democracy, but it's not. It's a small business run by one guy, but it's not." The firm oscillated between identities as a small business and as a mission-driven organization, between concern for firm profit and commitment to doing right by client nonprofits, at whatever cost. This tension was amplified by the fact that InsightSolutions, ArtsNow, and FocusImpact were largely staffed by professionals with nonprofit sector training and experience. Generalist firm members had degrees in social work, international relations, and public administration and experience working in nonprofit and public-sector organizations, while ArtsNow staff were trained as artists and arts administrators and brought professional arts experience--in theaters, symphonies, and museums.

With these backgrounds came expressions of identity linked to nonprofits' pursuit of missions toward social impact--what I call "mission-oriented" identities. As an InsightSolutions staff person put it, "we are nonprofit people." A FocusImpact consultant similarly described herself as driven by social impact: "I've always wanted to do something that had a positive impact in the world." Consultants universally described ending up in consulting as accidental, in the context of work in the nonprofit sector. As Ines put it, "it's not like I thought to myself, 'I want to be a consultant,' until the year that I ended up reaching out to InsightSolutions. I worked [in libraries] in various roles for 15 years [before coming to InsightSolutions]." So strong were consultants' expressions of mission-oriented identities that consultants struggled to understand the occasional firm member who did not share this orientation. An InsightSolutions consultant shared with me her confusion about a staff member who worked at the firm because "he just believes in having a job" and making money:

> Something that fascinates me about Samuel is that he seems to be the only person who doesn't do this work because he's driven by some personal mission to make the world a better place. He doesn't believe in systems change; he just believes in having a job. Everyone I think just wants to ask him, so if you just want a job why this one? I also

> think that people struggled with him at first for that reason--because everyone is so mission-driven.

She admitted that staff struggled to relate to Samuel because he was not "driven by some personal mission," an identity emulated by the rest of the InsightSolutions team.

This sense of shared firm-wide identity corresponds with established practices in "knowledge-intensive" organizations, defined by Alvesson (2000) as "companies where most work can be seen to be of an intellectual nature and where well-educated, qualified employees form the major part of the workforce" (1101). In such organizations, regulation of employee ideas, values, and identities is central to effective intra-organizational coordination, with a main task of the organization to create employees with desired "mindsets" to ensure adequate organizational control (Kärreman and Alvesson 2009:1117). Indeed, corporate consulting firms are considered prominent examples of the "central role of corporate culture in instilling and reinforcing values and beliefs amongst their workforce" (Kipping and Wright 2012). The question of how a sense of shared identity affects intra-organizational dynamics also aligns with Zelizer's (2009) argument that intimacy in economic organizations, defined as privileged access to others' attention, information, or trust, can both build interpersonal solidarity or disrupt organizational effort, depending on what kind of intimacy is present and where intimate relations are located within the organization.

Important in the case of consultants to nonprofits was that staff discourse about their identities was as much client-focused as it was internally-oriented--consultants were just as eager to convince their clients that they were in solidarity with nonprofits as consultants were focused on ensuring consistent staff behavior and a shared sense of purpose. In conversations with clients, consultants often referenced past careers in the public and nonprofit sectors to back up their perspectives and statements of empathy for client difficulties. At InsightSolutions, clients

reported that the fact that InsightSolutions staff served on the boards of nonprofit organizations reinforced a feeling of solidarity. Consulting firms correspondingly used their staff's social sector experience as marketing tools and ways to signal the legitimacy of their expertise. ArtsNow marketing materials read, "ArtsNow truly understands the value of what you're doing--they've been there." Similarly, FocusImpact staff bios, listed on the firm's website, highlighted staff members' mission-oriented identities:

> Tina is motivated by her belief in the moral responsibility of all humans to each other. She works with clients across sectors to advance and preserve the common understanding of social good. She is committed to helping organizations become better, stronger actors in their field, so they are optimally positioned to achieve equity for all.[98]

Consultants' expressions of mission-oriented identities reinforced firms' position between the for- and nonprofit sectors, blending mission-and business-oriented motivations. While a shared mission to make the world a better place united staff in a common purpose, firms also advertised these dispositions to legitimate their expertise, attract clients and make money.[99]

Identity Talk and Client Relationships: Articulating Nonprofit Norms

These mission-oriented identities were very salient in consultants' discourse about their work. As self-described mission-driven professionals working in a for-profit context for nonprofit organizations, consultants engaged in ongoing work to define relationships of genuine support and solidarity with their nonprofit clients. As the previous section suggested, the first set of practices by which consultants did this was identity talk. In interviews with me, conversations with clients, and during internal meetings with other consultants, consultants spoke about their

[98] This quote has been lightly revised to preserve anonymity.
[99] In leveraging staff's social sector backgrounds and expressions of mission-oriented identity as key to their brands, consulting firms' behavior aligns with Fayard, Stigliani, and Betchky's (2017) analysis of the efforts of service designers to distinguish their profession from related occupations on the basis of organizational "values," such as collaboration and co-creation, enacted through work practices.

identities as "nonprofit people" to distance themselves from what they felt were negative perceptions of consultants. As part of this effort consultants matched their behavior to the norms they felt were salient in their work. Generalist consultants engaged in role distancing (Goffman 1961)--they avoided business-oriented language, transforming their goals from profit to fair pay, and from business growth to social change. By contrast, arts-specialist firms used business language freely. In what follows, I will show how, via these different practices, generalist and specialist consultants articulated distinct norms to which they adhered in their work with nonprofits.

How to be a "Nonprofit Person" in Consulting

Multiple consultants spoke to me about feeling strain between their commitment to social impact and work in consulting firms. A consultant at a large firm told me in an interview that many of her colleagues "are really struggling ideologically to reconcile the fact that they are devoting their lives to social impact but doing it under this uber-capitalist structure." Melisa, a FocusImpact consultant, clarified this point. As we chatted in the hallway of FocusImpact's offices, she commented that most of FocusImpact's "people come from nonprofit sector, and they are oriented toward [nonprofit work and social impact]. Consulting is like a dirty word, so we are trying to say we aren't that." Consultants reacted to a perceived negative connotation of consulting work, rejecting a prevalent perception of management consulting as made up of mercenary emissaries from the corporate world (See Kihn 2005), and seeking to distance themselves from the notion of consultants' profit-seeking motives, which consultants perceived to be inappropriate in their work with nonprofits. This discomfort applying a profit-seeking industry, consulting, to the pursuit of social impact recalls Viviana Zelizer's 1979 work on how

customers in the nineteenth century life insurance industry initially rejected life insurance because they felt assigning a monetary value to a family member's death to be morally repugnant. It also echoes the "hostile worlds" perspective in economic sociology, critiqued by Zelizer, that assumes that profits and intimacy cannot coexist; that the entry of money or, in this case, profit, corrupts social relations (2012).

Correspondingly, consultants spoke passionately about their personal commitments to social impact and social change as motivating their consulting work, rather than pursuit of financial compensation. As Arthur, founder of ArtsNow, put it, "we are in it for humanist reasons--we want to figure out how to be part of change. We get a lot of psychic compensation from the fact that we really believe we're contributing to building communities. We are not the kind of people who need tangible results or credit, or economic results." He claimed that ArtsNow staff were "not the kind of people" who needed significant economic return on their work, emphasizing staff members' mission-oriented identities and highlighting what he called "psychic compensation"--intangible compensation derived from the knowledge that the firm was making the world a better place (England 2005). This notion of intangible compensation is often used to describe work in the nonprofit sector (e.g. Frumkin 2002); in describing his team in these terms, Arthur suggested that consultants' behavior aligned with what he perceived as standard nonprofit sector practice.

In an interview Jim similarly distanced himself from the consulting industry by talking about his identity:

> I can't imagine who says, "when I grow up, I want to be a consultant," because I certainly didn't. When I grew up, I wanted to smash the capitalist state. I lead a simple life, so it's not about money. But I can look around Philadelphia, at stuff that either wouldn't have happened, or wouldn't have happened as fast or as well if we weren't involved. I feel really good about that stuff on a very personal level. And a sense of personal mission. I feel good about that. I'm not trying to amass fortunes for my grandchildren. I want to

> make the world a better place, and I want to have people work here be paid fairly, and then when they leave they can make the world a better place. So, that's what drives me. And so, I have to back into caring about all this business stuff as a result of that.

Jim claimed to be motivated, in his work at InsightSolutions, by the evidence of impact the firm had on Philadelphia and the corresponding sense that he was making progress on his "personal mission" to make the world a better place. He specifically distinguished this motivation from a desire to make money or "amass fortunes," claiming that his mission-oriented identity made it difficult for him to focus on InsightSolutions' bottom line. As he later elaborated, "I have to keep reminding myself by having Anita remind me, 'oh yeah, we're a business.'"[100] In Jim's telling, he needed Anita, the firm's managing director, to remind him that profitability was a priority for the firm. He drove this point home over and over to me in interviews: "I feel really honored and humbled to do what I do. Like, when is the world gonna wake up and realize, if they didn't pay me, I'd still do it?" Whether or not these narratives aligned with Jim's behavior in practice, it is notable that he went to great lengths to assure me of a mission-oriented identity and to rhetorically distance himself from the goal of making money, which he perceived to be distasteful in the context of work with nonprofits.

Jim did carry this way of thinking into conversations with clients. In the case of InsightSolutions' activist church client, he downplayed the client's desire to monetize his cathedral space: "if it's me speaking, we don't need to live in a place where everything is monetized or profit maximizing. That there is a reason for sacred spaces." He advocated that the client focus on the social impact he desired to bring about by repurposing the space, rather than focusing on profit maximization. As Jim told me in an interview, he also acted on his "personal

[100] A FocusImpact consultant similarly expressed difficulty in focusing on his firm's bottom line, telling me that his work for clients "is work I really care about! I want to get it done, but now I have to think about this firm's bottom line, because this consulting work is our only source of revenue."

mission" in how he spent his time. He explained the firm's frequent contribution of *pro bono* time, or free labor above the contracted amount. As Jim put it, "we have financial targets, but we aren't a slave to them, though we probably should be. And when I do this *pro bono* work, it means I am working on the weekends. So it's not just *pro bono* financially. It's also personally *pro bono*." Jim contributed personal *pro bono* time to worthy projects to enact his prioritization of the needs of his nonprofit clients over the firm's financial targets. He simultaneously admitted that he knew this behavior was in tension with his firm's goals as a for-profit entity, a reminder consistently provided by Anita, the firm's managing director.

Consultants' attention to how they were perceived by their clients and other consultants resonates with the centrality of impression management in consulting of all types (Ernst and Kieser 2002). However, consultants to nonprofits did not engage in impression management primarily in pursuit of greater economic gain. Instead, consultants carefully distanced themselves from what they perceived as consulting's association with profit-seeking behavior to adhere to what they perceived as normative in the nonprofit sector and, by doing so, support their claims of mission-oriented identities (Goffman 1961). Marsh (2008) referenced similar mission-oriented language and efforts to align action with progressive values in the case of sole proprietor consultants in the public sector, and Kleinman (1996) found similar rituals of self-disclosure and identity talk among staff in a progressive health organization, showing that such practices satisfied staff members' identity needs as "alternative" people.

The convergence of consultants' business practices and personal identities, combined with their desire to avoid the perception of profit-seeking behavior, also aligns with Turco's 2012 findings that efforts to commercialize "personal" domains of life may fail when employees' personal identities and professional projects align with euphemistic discourses used by

companies to make commercialization palatable to the public. In such settings, Turco found, employees' attachment to the values and practice implied by a company's euphemistically-progressive framing of their work may lead them to refuse to decouple their practice from that framing, as such decoupling would undermine their identities. Indeed, InsightSolutions can be seen as an example of close *coupling* of firm discourse and behavior, in which employees' enacted identities and firm framing were closely aligned, leading to widespread resistance to styles of talking about and doing work that consultants perceived as morally inappropriate.

Avoiding Business Language in Generalist Firms

As part of consultants' attempts to emphasize that they prioritized mission over money and to distance themselves from the consulting industry, consultants in generalist firms displayed a striking discomfort with using business-oriented language to discuss their firms and goals. Specifically, though consultants in the nonprofit sector are generally assumed to bring the logic of corporate America into the nonprofit sector, firm leadership actively avoided using the word "profit" to describe firm goals and net revenues, even in internal conversations that clients would never access. For example, during a management meeting, InsightSolutions' leadership team were happy to acknowledge that the firm outperformed revenue expectations for the month. When Anita, who was hired by InsightSolutions ostensibly to help make the firm more profitable, attempted to explain the difference between revenue and profit for the firm, Jim balked. Instead of "profit," he suggested, the group should think about the revenue surplus as representing "human effort." This echoed InsightSolutions members' perception about appropriate activity in the nonprofit sector. For example, during a project for a large youth-serving organization, Jim redirected a client representative when the client spoke about "selling"

naming opportunities for a new building. Rather than using the word "sell," Jim recommended, the client should call this "an acknowledgement of contribution and support." In another case, in the context of a program expansion project, Ines became incensed over the assumption that the program would turn a profit: "It's not going to happen. How are we in the business of these nonprofit money-generating businesses? And we still want to serve the underserved of the underserved--no one will buy that!" She decried the notion that the program could both serve the most underserved audiences *and* turn a profit.

Other generalist firms similarly avoided language that staff perceived to be associated with profit-seeking behavior. During an all-team meeting for FocusImpact's nonprofit strategy team, group members talked through a set of goals for their future work. When the consultants reached and began to discuss a goal about the importance of "upselling and re-engaging past clients," Lucy stopped the conversation. "Does anyone else not like the term 'upsell'?" There was a collective groan--no one liked the term. Lucy continued. "It sounds like a used car salesman." Marion nodded. "How about impact enhancement?" Tina liked this suggestion. "It's about impact, deepening impact." Andrew agreed. "Or it should be." Henry, a lower-level staff member at FocusImpact, explained this phenomenon. In his experience at the firm, he told me, "profit and earned revenue are dirty words." Consultants in generalist firms actively avoided using language that connoted that their goal was to extract profit from their nonprofit clients, which they perceived to be inappropriate in their work. Instead, they chose language that reinforced consulting firms' focus on social impact and consultants' performances of mission-oriented identities. Kleinman (1996) found similar behavior among staff of an alternative healthcare organization--there were rules for talking about money, which members considered "inherently evil" (34). In this context, "members talked about money in ways that maintained

their identity as a legitimate alternative [to the medical establishment]" (30). In this similar case, organizational members also selected specific language with which to talk about money that reinforced their identities.

Again, this careful nomenclature was also part of consulting firms' marketing efforts to define themselves as trustworthy allies of nonprofit organizations, blending money- and mission-oriented motivations. For example, FocusImpact intentionally described its role as a "partner" to nonprofits. Amy, the firm's marketing manager, explained this to me: "that was very intentional […] we don't want to be seen as like the Analyticos and the StrategyGlobals that come in, tell you what we think, take your money and leave. We are committed. We share in that mission-aligned way of thinking." FocusImpact selected marketing language that highlighted the distinction between the firm and corporate consulting, emphasizing that FocusImpact shared nonprofit professionals' mindset and commitment to social impact.

As part of consultants' avoidance of business-inflected language, consultants rhetorically transformed their firms' goals from profit to fair pay, and from business growth to social change. After a meeting with InsightSolutions' partners in which the group discussed the firm's revenue growth goals for the next several years, Jim re-narrated the importance and purpose of growth to me. "If we grow by 12% instead of 5%, then we're helping the world be better off by 7%. I believe that. And, you know, I believe that if we make more money, then we can pay our staff more money." He equated InsightSolutions making more money with a corresponding increase in the degree to which the "world was better off," engaging in rhetorical gymnastics to ensure that his firm's revenue goals did not contradict his mission-oriented identity claims and perception of appropriate conduct in the nonprofit sector. Ines reinforced the second part of Jim's point, the idea that turning a profit would allow InsightSolutions to fairly compensate staff,

whose salaries were similar to nonprofit professionals. She claimed that learning how to accurately price and scope work and "perhaps have a profit" was important "in terms of being able to compensate all of our staff fairly." By focusing on fair pay for staff, Ines again found a justification for profit that felt appropriate to her mission-oriented identity performance and to work in the nonprofit sector.

FocusImpact engaged in similar rhetorical leaps, to related ends. Chelsea described her rationale for authoring "thought leadership" pieces--articles and blog posts articulating FocusImpact's position on issues relevant to the firm's clients--during the whole-team retreat mentioned earlier. "If we put an idea out there and we don't get more business, are we really improving the social sector, because we aren't applying [the idea]?" Again, Chelsea equated "getting more business" with additional social impact, as more client work allowed consultants to further disseminate their ideas, which she felt increased their impact on the sector. Generalist consultants engaged in rhetorical leaps to legitimate their pursuit of revenue growth and profit, avoiding language that suggested profit-seeking behavior and instead equating consulting firm profit with growth in firms' social impact and ability to fairly compensate staff. Again, Kleinman (1996) observed similar behavior in a nonprofit healthcare organization, in which staff transformed select features of bureaucratic management into "indicators of their commitment to alternative ideals" (34). Consultants' similar work allowed them to maintain mission-oriented identities and feel as though their firms' conduct was appropriate to consultants' genuine relationships with their nonprofit clients.

What's Appropriate in the Arts: Embracing Business Language at ArtsNow

Distinct from generalist firms like FocusImpact and InsightSolutions, ArtsNow used business-related language freely, both internally and in client work. In this section I will show that these differences arose because ArtsNow consultants perceived different norms in the arts field regarding using business-oriented language. Additionally, ArtsNow consultants rhetorically established a distinct, supportive purpose for treating arts organizations like businesses--legitimating the importance of the arts. Through these strategies, ArtsNow established different bases for appropriate behavior than did generalist firms, while sharing a commitment to marking relationships of genuine support and solidarity with nonprofits.

Like InsightSolutions and FocusImpact, ArtsNow consultants talked in interviews about being "arts people" who worked at ArtsNow to help the sector, rather than to make money. Recall Arthur's statement that ArtsNow staff were "in it for humanist reasons--we want to figure out how to be part of change. We are not the kind of people who need tangible results or credit, or economic results." However, ArtsNow diverged from generalist firms' practice in staff members' marked comfort with using language associated with business concepts--like markets, profits, and margins--both in internal firm conversations and in client work. In an all-team retreat, firm members spoke about ArtsNow's "verticals" and market segmentation, referring to other firms as "competitors." Arthur, the firm president, also frequently talked to me about the firm's profit margin. This distinction could be related to the differing backgrounds of ArtsNow staff as compared to InsightSolutions and FocusImpact--as Arthur put it in an interview, "everybody that works here has some business training and business acumen, whether it's practical or an undergraduate business degree or graduate MBA, so generally, our corporate vocabulary [includes these concepts]." More ArtsNow staff members did have business degrees

than the other firms in which I did fieldwork, though they were also deeply steeped in the arts. All staff had professional experience in the arts, arts administration or arts education, and used theater metaphors, such as likening consulting to stage-managing, as often as business language in discussing their work.

Notably, in conversations with me, ArtsNow staff members did not express the kind of ambivalence about consulting work and its profit-seeking connotations as did FocusImpact and InsightSolutions staff. As Morgan put it, "at the end of the day, you don't produce a Hamilton and generate revenue without talking about [things like profit]." Arthur elaborated. "Our clients are in the transaction business, period." He explained that some of the business-inflected language he used, he taught to clients, and some clients already used. Arthur cited the trend, in the 1980s and 1990s, of business involvement in the arts, as a moment in which arts organizations started incorporating more business concepts into their practices (Wu 2002). While generalist consultants felt that profit-seeking behavior and business language was inappropriate in their relationships with nonprofit clients, there was precedent for business parlance in the arts, which meant that ArtsNow consultants viewed it as fair game.

ArtsNow consultants also rhetorically manipulated the purpose of using business language with their arts clients in order to legitimate their approach as supporting relationships of solidarity. As Natasha told me in an interview, ArtsNow hoped that using business language would help make the case for the importance of the arts in society:

> Where there seems to be a lack of knowledge about arts organizations as businesses, by introducing that vocabulary, one of the things that we hope to do is instill a sense of legitimacy. We really do believe that the arts are impactful and are necessary. Part of realizing the necessity and value of the arts is legitimizing it in the way we speak. A lot of other sectors don't have the same crisis of legitimacy that the arts do. Homelessness is a crisis; that's easy. We know the problem exists.

She continued, articulating her view that in contrast to homelessness, arts organizations have to shoulder the burden of justifying why their work is necessary. In Natasha's opinion, framing the arts as businesses helped in this legitimizing effort, thus making a business orientation not only acceptable but necessary in demonstrating consultants' solidarity with and genuine desire to support their nonprofit clients.

Arthur elaborated on this notion in an interview, pointing out that legally speaking, nonprofit organizations are allowed to make profits--they just cannot distribute profits to shareholders. In Arthur's view, however, this knowledge has been lost in the arts, as the sector re-oriented around philanthropy as a primary source of revenue. In this context, he said, ArtsNow aimed to re-create "a shared language between the people who run arts organizations and people from the business sector" who make up a significant proportion of the philanthropic community. As Arthur articulated, ArtsNow consultants viewed using business language and framing arts organizations through a business lens as critical in making the case for the arts as worthy of philanthropic investment. He claimed that ArtsNow attempted to do this by pointing out to businesspeople that arts organizations and the businesses from which they generated their wealth were not so different after all.[101]

ArtsNow correspondingly used profit-seeking language in its own work, though Arthur still couched the purpose of profit as fair pay for staff, to maintain a positive connotation for his goals and avoid a perception that ArtsNow intended to get rich off of its nonprofit clients. In Arthur's words, "ArtsNow is a for-profit business. Our goal is to make sure the people who work here are better off than they would be in the disciplines, with better work-life balance, and some

[101] The intent of this analysis is not to assess whether ArtsNow's assumptions and strategies to legitimate the arts were correct--rather, my purpose is to point out how ArtsNow consultants rhetorically manipulated the purpose and impact of using business-oriented language to cohere with their mission-oriented goal and identity claims.

profit to distribute." Business language for ArtsNow consultants was *the opposite* of inappropriate in consultants' relationships with client nonprofits. Instead, ArtsNow consultants viewed a business orientation as critical in how they made good on their commitment to help the sector, a view that legitimated a profit-making orientation and using related language both with clients and in ArtsNow's own practice.

In sum then, the case of ArtsNow provides additional evidence of how consultants to nonprofits adjusted how they talked and thought about their work to correspond with what they perceived as normative conduct in the nonprofit sector. Like consultants in generalist firms, ArtsNow staff said they were motivated by social impact rather than profit. However, in their work, this mission-oriented identity talk did not lead to an avoidance of business language in the firm. Unlike the case of generalist consultants, who felt that business language was inappropriate in the nonprofit sector, ArtsNow consultants drew on existing precedent of treating the arts like businesses and argued that using business language helped legitimate the importance of the arts to philanthropists. In doing so, they framed using business language as *core to* rather than *inappropriate in* their solidaristic relationships with clients.

Emotional Buy-In

As part of both generalist and arts-specialist consultants' work to mark relationships of support and solidarity with their nonprofit clients, consultants also often talked, both internally and in client meetings, about "believing in" and developing emotional attachments to their work and clients.[102] Drawing on their professed mission-oriented identities, consultants reacted emotionally to clients' victories and struggles. They also had stronger connections to some

[102] Scholars, including Bandelj (2009), have written about the important role of emotions in economic activity.

clients than others. In this context, consultants' "emotional buy-in" helped them build credibility with clients and legitimate their work in the nonprofit sector. It also tied into consultants' framing of their work as carework, which I will discuss in a subsequent section.

In a meeting for InsightSolutions' Historic Park client, Ines and Margaux pitched the framing for a final strategic plan document to the client: "so this is the story." Smiling, the client, a usually-circumspect middle-aged Black woman, replied warmly. "I think your heart is in it--it's so gratifying, it could just be a project you complete." Ines blushed, smiling. "We are sucked in, all in. For the next meeting, we are part in this passionate, reflective moment […] because we are *all in*." Ines highlighted her commitment to and belief in the project as a reason why the client should view her and InsightSolutions' work as credible--she described herself as "all in" on the project, signaling to the client a shared commitment to Historic Park's importance and success. Ines had suggested that emotional buy-in of this kind was normative in this project in an earlier conversation about Historic Park. "You can't argue with heart," she had said, when discussing the difficulty she experienced in disagreeing with the client, whose involvement in Historic Park stemmed from a desire to honor her deceased husband. Emotional buy-in was both expected and sacred in this context, and recognizing and reciprocating such commitment was a major contributor to consultants' credibility.

Such performances of emotional buy-in as grounds for credibility recall studies of the production of credibility in science (e.g. Hilgartner 2000; Epstein 1995). Hilgartner (2000) argued that strategic self-presentation and impression-management are important in being perceived as authoritative. As such, Ines' performance of emotional buy-in could be seen as a strategic move to reinforce her credibility in the eyes of her client, *and* as an effort--strategic, genuine, or both--to emulate the candid and caring speech and displays of emotion that Ines felt

were normative in the nonprofit context, and specifically in the case of Historic Park (Lichterman and Eliasoph 2014; Hochschild 1979).[103]

Consultants conveyed similar sentiments in internal team meetings, which suggests that consultants' performances of emotional buy-in were not solely meant to burnish their brands. One weekday afternoon, I finished up a phone call with Ines. The call had been with a client whose organization was in, as Ines called it, "financial freefall." Visibly struggling, Ines expressed anguish about how to write a final plan for the client:

> I'm writing something I don't believe--how will [the client]?" [Writing the plan] is storytelling. I can say I've developed an emotional attachment--I'm out of my depth in delivering straight shit. So we need to bring [the Executive Director] here for a meeting with Jim.
>
> She sighed deeply.
>
> Shit, this is too hard. I'm so sad, I want to cry. […] I wouldn't have been on this project if I knew it was a plan for an organization in financial freefall. We were nice, right!? I feel like a failed therapist.

Citing her "emotional attachment" to the client, Ines claimed that she could not deliver bad news about the client's dire financial straits--she would need to bring in the firm president, who lacked this emotional connection because he had not been involved in the project, to intervene.[104] As another example, in the course of work for InsightSolutions' sports youth development client, Ines underlined the centrality of emotional buy-in to consultants' work. She, Margaux, and I met to discuss our progress on helping the client codify his program model. Margaux commented that core to the client's program delivery model was the idea that "if you train to be really good at sports you will become a well-rounded person." I shrugged and commented that I was not sure

[103] Kleinman (1996) pointed out that similar emotional rituals produced solidarity and helped members of a health nonprofit feel like they cared about each other, even as these rituals concealed power imbalances.
[104] While InsightSolutions consultants did sometimes bring in their senior colleagues, especially Jim, to help "unstick" clients whose projects had stalled, this kind of delegation of bad news was not a pronounced pattern.

whether that was a good assumption. Ines reacted strongly. “You need to be willing to buy this!” She reprimanded me for failing to believe that the client’s model would produce its intended outcomes. As these examples suggest, believing in clients’ work was central to consultants’ ability to define their relationships with clients as genuinely supportive, which in turn reassured consultants that consulting work supported their professed mission-oriented identities. Believing in clients’ work encompassed two kinds of emotional buy-in--first believing that the strategic plans that clients and InsightSolutions created together represented accomplishable and truthful futures for clients, and second that clients’ work would actually make the world a better place.

Consultants at other firms spoke similarly about emotional buy-in. After arriving in Canada for an ArtsNow client meeting, Isabel and I had a late-night drink at the hotel bar. Talking about how she ended up in consulting, Isabel told me that the work was not what she expected. In her words, “When I started, I thought I would be off at 5pm and wouldn’t care. Now, I feel exhausted from caring so deeply.” While Isabel expected an arms-length relationship with her work, she was surprised--and exhausted--by the level of emotional buy-in she experienced. This topic came up again after the client meeting, as Anna, Isabel, and I talked over dinner at an Italian restaurant. Waiting for our entrees, Anna asked Isabel about something Isabel had said earlier--that ArtsNow had no preference for its clients’ chosen direction. Anna wondered if this was completely true. “Does emotional investment ever get in the way?” Isabel sighed, answering in the affirmative. “Arthur and I care deeply about some clients [and doing] right by the community.” She continued, explaining that ArtsNow consultants were generally invested in their client’s success, with the exception of clients with distasteful personalities. Isabel echoed Ines in articulating that she cared deeply about ArtsNow’s clients, suggesting that her emotional buy-in to clients’ work led her to express opinions regarding how clients should

"do right by the community," rather than remaining objective about clients' chosen directions. As these exchanges show, believing in clients' work and potential to make the world a better place was core to the work of being a consultant to nonprofits. While emotional buy-in at times made it difficult to share bad news with clients, believing in the work was both a normative expectation and essential to doing good work that genuinely supported nonprofit organizations.

As Isabel's statements suggested, consultants were not equally emotionally bought-in to all clients. Consultants expressed especially strong feelings for clients whose work they felt to be particularly important, or to whom consultants had social connections. For example, in the final meeting for InsightSolutions' Historic Park project, Ines spoke about the inevitability of InsightSolutions' involvement in the project. "Before we responded to the RFP, we went on a city tour, and we couldn't *not* be involved. Once we heard the story, and I had the connection to [the lead client]. More people need to visit [the site] and get hooked like we did." Jim echoed this sentiment when explaining his enthusiasm for a major urban park project; he said that he "couldn't turn down" the chance to be involved in a project that he believed was so important to the city. A similar phenomenon took place at ArtsNow. A team member told me, as we discussed a client in a coastal city, that "every client is unique, but Arthur is particularly attached to this one. He included nine site visits in the scope, I think because he wants to be there and cares so much about it--he knows a lot of people in the community." Consultants' buy-in was strongest for clients whom they felt did important work, or with whom consultants were socially connected. This differential emotional attachment to different clients later influenced how consultants charged clients and the degree of effort consultants allotted to projects, effects that will be elaborated later in this chapter.

In summary, identity talk helped consultants mark relationships of support and solidarity with their clients. In their discourse about their work and goals, consultants defined the set of norms to which they adhered in order to feel like they were working ethically in the nonprofit sector and support their claims of mission-oriented identities. Consultants made a point, in conversation, to distance themselves from the consulting industry and assumption that consultants engage in profit-seeking behavior, which they perceived to be inappropriate in their work with nonprofits. Consultants instead spoke passionately about themselves as "nonprofit people" who prioritized social impact over financial compensation. Within this general orientation, consultants deferred to different norms depending on the type of nonprofits with which they worked. While generalist consultants, who worked with nonprofits across multiple subfields, imagined norms that applied broadly across the whole of the nonprofit sector, arts-specific consultants defined distinct norms as operative within the arts in particular. Generalist consultants avoided using business language that they perceived to be associated with profit-seeking, rhetorically reframing their firms' revenue growth goals as opportunities to increase their social impact and fairly compensate staff. While ArtsNow specialist consultants similarly described themselves as prioritizing impact over money, this orientation did not lead to avoidance of business-oriented language, as ArtsNow consultants believed, due to historical precedent and their own rhetorical work, that using business language supported their goals to legitimize the importance of the arts to a business audience.

Additionally, for both generalist and arts-specialist consultants, performing emotional buy-in reinforced consultants' credibility in the eyes of clients and signaled to clients a shared commitment to client organizations' importance and success. For consultants, believing that strategic plans represented the "right" futures for clients, and that clients' work would actually

make the world a better place allowed consultants to feel as though their work supported their mission-oriented identity performances.

In relational work terminology, deferring to these perceived norms, both in internal operations and client-consultant interactions, supported consultants' efforts to build solidaristic relationships with nonprofit clients. Identity talk simultaneously reinforced firms' reputations; consultants *blended* mission- and market-oriented rationales, rather than these orientations cancelling each other out (Zelizer 2012). This resonates with Spillman's (2012) finding that business association members pursued solidarity with their occupational group and collective identity, rather than simply acting in self-interest. In the case of consultants to nonprofits, consultants pursued solidarity both with other firm members who articulated mission-oriented identities, and with nonprofit clients. By talking and acting in ways that were both acceptable to consultants' mission-oriented identities, and that consultants perceived to be appropriate in interactions with nonprofit clients, consultants oriented themselves toward what they thought was normative behavior in the nonprofit sector.

Moralizing Money

The second set of practices by which consultants marked relationships of genuine support with nonprofits I call *moralizing money*. As the norms consultants defined for their work via identity talk mixed with the day to day challenges of pricing, conducting, and billing for work, consultants made decisions about who to accept money from, how much work to do, how much to charge and how to charge it, attempting to align their actions with what they perceived was appropriate to their relationships with client nonprofits. In doing so, consultants engaged in three sets of practices. First, they *worked beyond budgets*--consultants went to great lengths to

accommodate nonprofit budgets, encountering frequent overrun and "scope creep." Second, they *modified fees*--consultants discounted prices, worked for free for certain clients, and billed as a "fixed fee." Third, consultants *nickel and dimed* their own expenses to keep the amount they charged reasonable. Via these practices consultants actively worked to maintain supportive relationships with their nonprofit clients, and in doing so reinforce their own professed mission-oriented identities. However, in doing so they simultaneously undermined their own firms' bottom lines.

Working Beyond Budgets: Scope Creep and Over-Empathizing with Clients

Consultants enacted their solidarity with nonprofits in the effort they allotted to projects. Specifically, consultants treated producing quality work as a moral imperative. As part of this, InsightSolutions employees indicated discomfort regarding cutting a client off at the end of the engagement. Ines clearly expressed a link between quality work, morality and effort in a meeting with InsightSolutions' Historic Park client. Shaking her head, she rehearsed what she might say to postpone a meeting: "this is a complex process, and we as consultants didn't grasp the half of it. Now we are $150-200,000 over budget, and we have an ethical and values-driven commitment to attain a level of quality that in all honesty we haven't achieved." At times, consultants couched this commitment in a desire to respect clients' decisions to invest scarce resources in consultants. Ines explained this to me in an interview.

> We take very seriously our clients' investment in the work that they do with us. You know all the stuff about the sector being under-capitalized, under-resourced broadly […] more and more these days, [clients are] pulling those resources from their operating funds to pay us. We know that that's not a decision that they make lightly. So we really honor that, and are committed to delivering an engagement, a product that passes a very high quality standard.

Ines conveyed a moral imperative for consultants to serve as good stewards of nonprofits' scarce resources by providing high-quality products.

In practice, Ines explained, this commitment to doing high quality work often meant providing more work than she was compensated for, a phenomenon consultants called "overrun" or "scope creep." In her words, "we don't *want* to go over [the contract amount], but we want to really provide service that is excellent. And get a great reputation. That is often at odds with being able to come in at the budget that we had set for that client." She articulated a dual rationale for scope creep--providing excellent service that fully met the client's need, and reinforcing InsightSolutions' reputation, blending moral and instrumental motivations. She continued: "once we're in the work and we've developed relationships with the client, it feels almost amoral not to go above and beyond." In Ines' telling, scope creep was often necessary to fulfill consultants' commitments to serving as good stewards of nonprofits' resources by providing excellent service, which in turn reinforced consultants' reputations as trusted partners to nonprofits.

Amanda, another InsightSolutions consultant, echoed the idea that providing extra, uncompensated work supported InsightSolutions' efforts to build positive relationships with clients which, in turn, strengthened the firm's reputation in the marketplace. "This commitment to making something very personal and meaningful and useful to people means that we do what it takes even if that means going well beyond. [Also] I think our greatest capital asset is our reputation. The best and easiest way to maintain that is to do what people ask us." Perhaps ironically, InsightSolutions consultants suggested that in order to maintain a positive firm reputation that helped attract business, the firm had to engage in behavior that was detrimental to its bottom line--scope creep. In Amanda's narrative, however, these two rationales blended

together, rather than existing in tension with each other. In providing more work than they were compensated to perform, InsightSolutions consultants actively worked to maintain their firm's reputation as a trusted partner of nonprofits, which concurrently supported firm employees' professed mission-oriented identities.

Indeed, for the majority of the 10 projects in which I participated while conducting fieldwork at InsightSolutions, at the end of the project InsightSolutions offered to continue assisting the client with related matters, after the conclusion of the paid engagement. FocusImpact consultants also frequently invested extra effort in projects; during an all-team retreat for the firm's nonprofit strategy team, I learned that virtually all of the team's strategic planning projects had gone into overrun in recent quarters. As Natalia shared with me, "strategy [work at FocusImpact] always goes into overrun." Marion, the team's leader, partially explained this phenomenon, speaking about a particular client that does "such important social justice work. […] We will put in the time that it takes to make sure they're strong enough to make change […] because we want to have impact […] we see ourselves as being part of the social change solution." Marion later explained that overrun in FocusImpact's strategic planning work also stemmed from the time consultants invested in addressing often-difficult relationships between board and staff leadership, and in "hand-holding for the CEO or Executive Director, because they are basically entrusting the consultant with the identity and future of their organization." For FocusImpact, investing extra effort in clients supported consultants' commitment to prioritizing social change, implicitly over the firm's financial health, and helped consultants make the case that the firm genuinely sought to support clients to overcome the strategic and relational challenges that stood in their way to achieving social impact.

ArtsNow also struggled with a tendency toward scope creep. In a whole staff retreat, Susannah argued that she thought ArtsNow should cap the extent of peer and stakeholder research in projects. She sighed. "Scope creep…we talk about it, it's easy to go over in hours. […] but we can't do less of a good job on a smaller project. We have to do good work! So we go over." She reiterated the tension between staying in budget and doing a good job, which was heightened when projects had smaller budgets. Like FocusImpact and InsightSolutions, Arthur attributed a tendency toward scope creep to a commitment to doing high quality work, which was part of "living their values" and thus worth the cost. Indeed, Natalia from FocusImpact suggested that scope creep was widespread in consulting to nonprofits, telling me, "I've talked to other consultants and I think almost everyone goes into overrun."

Consultants' penchant for scope creep made their emotional buy-in to clients' work concrete. Indeed, consultants were particularly inclined to contribute extra work for clients to which they had particular emotional or social attachment--for example Arthur's nine site visits to his seaside client, and InsightSolutions' Historic Park client, for which unpaid hours stretched into the hundreds.[105] Engaging in scope creep helped consultants feel confident that their work aligned with their sense of appropriate behavior in the nonprofit sector--prioritizing social impact over profit. In doing so, scope creep helped consultants mark supportive relationships with nonprofit clients and bolstered consultants' own professed mission-oriented identities. Kleinman (1996) observed something similar in an alternative healthcare nonprofit, in which "being 'in the

[105] A lack of emotional buy-in could lead to the opposite outcome--consultants' desire to avoid contributing extra effort to a project. Consultants also constantly evaluated what constituted a reasonable request from a client. During my time at InsightSolutions, consultants painstakingly declined requests from clients to write a new grant application with short notice, or to present at a client board meeting mid-way through a planning process. Staff scrambled to meet clients' desires, rejecting requests only when they risked compromising the firm's standards of quality. Because consultants saw providing quality work as a moral imperative, this guideline supported, however circuitously, consultants' efforts to maintain positive relationships with clients.

red' proved to members that [the organization] was a true alternative" (30)--resource-related difficulties helped staff feel more alternative. Similarly, prioritizing quality and impact over money helped consultants feel more nonprofit.

However, some members of consulting firms challenged the rosy interpretation of scope creep, instead arguing that scope creep and emotional buy-in were counterproductive to consultants' work. At InsightSolutions, Anita, the managing director hired by the firm to reform InsightSolutions' business practices, called these tendencies "over-identifying with clients." Amanda explained how Anita's perspective affected her work, telling me about the plight of a social service client. She said that in preparing with Ines for a meeting with the client, they confronted the possibility that a portion of the organization would shut down, leaving the core organization intact. As Amanda explained, "I don't care what happens to the school. I care, from a human perspective. In my role, I cannot care. This organization that has hired us might close its doors. We need to know what happens to the school only inasmuch as it affects [the overall organization's survival]." Amanda went on to clarify that this separation of her "human" and professional reactions wasn't natural for her: "I was only able to have that perspective because I had Anita's voice in my head being like, 'We over-empathize,' and that's how we get off-scope and spend lots of money and lots of emotional energy goes into things that are outside of our work." Amanda continued that she appreciated the impulse to over-empathize: "it's a testament of all of our dedication to the sector […] and sometimes I think Anita looks at things with a little too much of a black and white business perspective." As Amanda put it, firm members whose role was focused on company sustainability had a more critical view of emotional buy-in, and the scope creep to which it led, as inappropriate in consulting and a contributor to firms' financial

problems. She suggested that both perspectives were valid but conflicting, illustrating the larger tension consulting firms experienced at the border of the for- and nonprofit sectors.

Consultants treated doing quality work, then, as a moral imperative connected to serving as a good steward of clients' scarce resources. Similar behavior has been observed in the context of corporate management consultants, in which the imperative of a "client orientation" is used by management as a euphemism to push staff to work harder and longer (Anderson-Gough, Grey, and Robson 2000:1171). However, as I have suggested, in the case of consultants to nonprofits, consultants' commitment to providing clients with quality work arguably *hurt* rather than *helped* firms' bottom lines. While, as I showed in Chapter 4, consultants engaged in quick synthesis to keep their processes efficient, in practice, a commitment to quality often meant providing more work than consultants were compensated to do--engaging in scope creep. Scope creep allowed consultants to act on their emotional buy-in to clients' work and identities as people who prioritize social impact over money, and simultaneously assisted consulting firms in crafting strong reputations as trusted partners of nonprofit organizations. However, firm members whose roles were focused on financial performance sometimes criticized these tendencies as counterproductive, alleging that consultants "over-identified" with clients, which contributed to financial problems. Rather than being used by management to extract additional labor from employees, a commitment to quality, operationalized as scope creep, prevented firms from maximizing the return on their labor. To use Polletta's (2012) framing, the same solidarity that "made it easy to practice […] also made [the work] difficult to sustain" (21).

Working Beyond Budgets: Overrun and Expertise

Some consultants felt that their tendency toward scope creep was intensified by what they described as a lack of business expertise among firm members. As Natalia explained, in her view

some of FocusImpact's overrun problems stemmed from staff inefficiencies and over-promising. She explained that in the beginning of engagements, FocusImpact staff often over-promised. "You want to tell [clients] they're going to get everything they want to get, and you really think you can do it all." This assumption, she continued, often was not accurate, and staff also tended to spend more time than allotted on work items. An ArtsNow consultant explained a similar tendency, telling me that a former senior staff member had helped shift the firm's approach away from "spend all the time you need and you'll make it happen, to, okay we need to actually be conscious of how many hours we're spending," improving the firm's financial outcomes. Even in this context, ArtsNow often exceeded its own estimations for how much effort a project would require. Arthur explained that ArtsNow tried to "keep our total labor costs to between 60 and 65 percent of the fee. In the last 10 years, we maybe hit that 60% number twice. It tends to be close to 70%, which is a problem of either underestimating or over-delivering." While ArtsNow ubiquitously exceeded their own estimations, it is important to note that this situation did not lead, in many cases, to overall cost overrun. As I will discuss in a subsequent section, this phenomenon was partly due to the fact that ArtsNow more stringently maintained standard fees and tracked its effort toward earning a profit.

A mid-level consultant in a medium-sized firm explained her firm's overrun tendencies as stemming from the fact that the firm's staff come from the nonprofit sector. "We hire people with sector experience, and we don't always have the tools to do the consultant piece. Things like project management for consulting, managing for profitability, projections, how you make sure that you're not just pouring time into a project." She argued that the fact that for-profit firms like hers were staffed by people who lacked experience in the corporate or consulting sectors meant that staff did not have the business acumen needed to prevent overrun, implicitly assuming that

such dispositions were missing or inappropriate in the nonprofit sector.[106] These skills, she continued, would have helped consultants "put up some of those guardrails" between what consultants *wanted* to do to help a client and what was financially feasible for consulting firms. She explained that she and her colleagues, lacking corporate training or backgrounds, found such "guardrails" to "feel very artificial […] that is a struggle for us." She laughed, admitting, "I should never be in charge of anything about a for-profit consulting firm because I would just be like, 'we have to do this because we have to do it.' I would drive the place into the ground, without a doubt." The consultant claimed that her background in nonprofit work and penchant to prioritize social impact over financial success meant that she was incapable of helping her firm create the "guardrails" necessary to facilitate profitability, implicitly suggesting that in a nonprofit context such guardrails were inappropriate.[107]

Henry put this consultant's perspective in context, explaining his experience at FocusImpact. "Lots of people in client services [at FocusImpact] come from a similar background and may share similar ideas as the nonprofits, and so it's hard to get them into the business development mindset. That ends up undermining the firm." Echoing Anita's exasperation about InsightSolutions consultants' "over-identification" with clients, Henry suggested that mission-oriented identities and an alleged lack of business acumen were localized among client-facing staff, perspectives not necessarily shared by operations-focused staff.

Some consultants, then, felt that their firms' tendencies toward overrun were exacerbated by what they perceived as consultants' lack of business skills. This lack of experience,

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[106] The intent of this analysis is not to determine whether staff members actually lacked business acumen or whether such a lack caused profit problems. Instead, my intent is to point out that consultants felt that their nonprofit backgrounds made it difficult to focus and act on profit as a goal, implying that they felt such dispositions were missing or inappropriate in the nonprofit sector.

[107] In this context, it is possible that ArtsNow's greater concentration of staff with business backgrounds contributed to its healthier financial state, though this link is only speculation.

consultants alleged, caused profit-oriented "guardrails" regarding time spent on projects to feel foreign and artificial, because such norms were inappropriate in the nonprofit contexts from which consultants came, and out of sync with consultants' mission-oriented identities.

Modifying Fees: Working for Free (or Almost Free)

In addition to deciding where to allocate their extra effort, consultants designated some work as *pro bono* and completed it free of charge. Natalia from FocusImpact told me she knew some consultants who designated all project overrun as *pro bono* work, framing it as "their gift to the sector." Other consultants chose particular projects to do *pro bono*. Jim from InsightSolutions explained that much of the *pro bono* work he completed was for organizations for which he sat on the board of directors, explaining that other firm members similarly worked for free when they were on an organization's board. He clarified that he did not consider this *pro bono* work--"I'd consider that what you do to be a citizen in the world." Jim explained that InsightSolutions also gave free advice to organizations that firm members felt were doing particularly important work. He told me about first time he met the leaders of a public space organization that later became an InsightSolutions client. "No one had heard of them. I said, wow, this is really cool. It was clear they had this great idea and no traction on how to build an organization to make this happen. I said, you know, I'd be glad to help you with this." Consultants again prioritized organizations for *pro bono* engagements to which they had connections or that consultants felt did particularly important work. As part of this, consultants manipulated the definition of *pro bono* effort to support their enacted identities as altruistic "nonprofit people" and normalize free effort as expected practice in the civic sphere.

In addition to working for free for certain clients, consultants also reduced their fees for some organizations, again prioritizing those they felt were doing important work or to which consultants were attached. Jim explained which organizations he prioritized.

> I wouldn't want to [help a major museum] gain market share of families who want to look at dinosaurs, but I'm excited by the idea of how they can expand a program to get African American kids to think about STEM[108]. […] We look at who's making a meaningful change in the world, and how can we help them? When [an exciting organization] comes to us and they have no money, we work for pennies on the dollar.

He claimed that InsightSolutions reduced its fee for worthy organizations that could not pay, with worthy defined as "making real change" in the world in the eyes of InsightSolutions' leadership. Jim continued, explaining that sometimes these organizations later returned to hire the firm. This was an incentive, he told me, but not a necessary one. "If it didn't pay off, I'd still be okay because we're gonna be part of creating this incredible resource for Philadelphia."[109] ArtsNow consultants had similar criteria for prioritizing clients for discounts. As Arthur elaborated, "there are times when the relationship overwhelms the fee--it's a special thing, or we want to do more work for them later." ArtsNow consultants also prioritized clients with whom they had special relationships and from whom they desired future work, again blending marketing and relationship-related rationales.

This finding aligns with Uzzi and Lancaster's (2012) research on how large legal firms adjust prices based on the existence and degree of embedded ties between firm and client. Uzzi and Lancaster explained this finding via the reduction of transaction costs through tie-based information-sharing. While at InsightSolutions the provision of extra effort was similarly tied to a hope for future work, Jim prioritized organizations for extra labor according to his preferences

[108] Science, Technology, Math, and Engineering.
[109] I cannot confirm, via my research, whether Jim would actually "be ok" if such discounted work did not yield future contracts. However, Jim's discourse indicates that consultants prioritized particular clients for special treatment according to the perceived importance of the client's work.

and claimed that financial benefit was a "bonus" rather than the purpose of this effort. Working for free or almost free was, then, tied to the social and emotional connections that consultants had to particular organizations. Consultants worked for free for organizations to which firm members were connected. They reduced fees for clients with whom consultants had special relationships and those consultants felt did important work in the nonprofit sector.[110]

Modifying Fees: Setting Prices and "Fixed Fee" Billing

In addition to sorting which organizations to prioritize for free work and extra effort, consultants also strategized about how to price their work for all clients, and how to bill for this work in a way that marked genuine relationships with clients and felt appropriate in the nonprofit sector. Previous work in economic sociology has shown that setting prices is bound up with social and cultural meaning for both seller and buyer (Beckert 2011). Wherry (2008) argued that via the act of pricing, a buyer or seller manages a particular expression of himself or herself (364; Citing Goffman 1961), showing that the price paid for an item is part of how people make sense of who they are in society. Similarly, Smith (1989) showed that prices are constructed based on particular social situations' implicit rules of engagement. In this context, consultants to

[110] Consulting firms correspondingly *refused* to work for clients who they did not feel shared their mission-oriented identities, and "got themselves fired" when they felt unable to help a client achieve his or her goals. As a consultant at a large firm told me, "we are about social change, so we prefer not to work with clients who don't care." Since believing that clients' work would make the world a better place supported consultants' mission-oriented identities, organizations who "did not care" were not viable clients. Correspondingly, Jim told me that he walked away from work when he felt InsightSolutions could not help a client achieve her goals. He described telling a community development client that her money would be better spent hiring a community organizer: "Take the money that you're paying us and hire that kind of person. So, we kind of get ourselves fired." Jim continued, explaining: "It's a really shitty feeling when you don't feel like you're helping. […] A grownup might figure out hey, they'll pay us. But I can't do that." Jim framed the decision to terminate the engagement as a question of choosing mission over money, in which he prioritized resolving the negative emotional experience of "not helping" over InsightSolutions' bottom line. This move also supported consulting firms' reputations--consultants avoided situations where they felt they would not be effective, which might risk a negative review.

nonprofits worked to set prices for their work that they felt aligned with their performed mission-oriented identities and that helped maintain consultant-client relationships characterized by genuine support and solidarity.

During an interview, Natalia explained that FocusImpact set prices based on the budgets that nonprofits had available. The firm did this "with the understanding that [the project] will cost more" and would likely go into overrun.[111] This was done consciously, as FocusImpact staff understood that resources were limited in the nonprofit sector. As Natalia put it, "because our clients are nonprofits and their budgets are limited, we get it. We know that theoretically we should buffer the numbers more, but giving them a price tag of $150K is absurd, so there's sort of this acknowledgement that it may take longer." While FocusImpact knew that the prices the firm offered nonprofit clients were often insufficient to cover consultants' costs, staff felt as though charging clients more than their already-high prices would be inappropriate and chose to instead absorb the resulting overrun. Jim from InsightSolutions explained a similar practice of accommodating potential clients' budgets, but framed it in terms of a desire to support clients doing important work. "If someone calls us and they have this cool idea and they don't have a lot of dough but they have intellectual capital, we'll try to figure out how to solve that problem for them [either through fundraising support or adjusted fees] so they can hire us. whereas I think other consulting firms say, you don't have $40,000 dollars? Have a nice day." He posited that other consulting firms do not share what he described as InsightSolutions' flexibility to clients' available resources.[112]

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[111] Note that this practice happened within reason--FocusImpact did send potential clients to cheaper consulting firms if the budget the client had available was significantly smaller than FocusImpact's typical fee. I discuss this in detail in Chapter 7. Additionally, Natalia clarified that clients did sometimes end up paying for additional work, depending on their budget capacity and interest in more work.
[112] Indeed, large consulting firms like WorldAdvisors did *not* engage in such accommodation of nonprofits' budgets--I discuss this difference in practice between large and small firms in Chapter 7.

Indeed, while ArtsNow consultants cited a challenge of working with nonprofits as "our margins are as small as theirs," ArtsNow used more stringent criteria in determining whether or not organizations were eligible clients, depending on the budget the client had available for consulting work. In one case, Arthur spoke with Natasha and Susannah about whether to pursue a prospective museum client. Susannah lamented the situation. "This is happening a lot--organizations need strategic planning but don't have the money to pay what we usually charge." Arthur was clear. "Then they're not an eligible client." He continued, saying that the firm "can't do what we do" for fees much lower than its usual amount. Using the firm's commitment to quality work as a rationale, ArtsNow more stringently ruled out potential clients based on ability to pay, thus safeguarding the firm's bottom line and diverging from InsightSolutions and FocusImpact's practice.

Consultants' penchant for overrun, then, was intensified by nonprofits' small, rigid budgets for consulting. As I showed in Chapter 4, consultants *did* adjust what elements they included in clients' contracts based on budget size (e.g. number of stakeholder interviews). However, some consultants' desire to avoid what felt like overcharging nonprofits sometimes led them to pre-emptively accept the inevitability of overrun at the project outset, while others mustered a commitment to quality to preserve their likelihood of staying within budget.

As part of this desire to avoid feeling as though they were overcharging clients, InsightSolutions' leadership expressed reticence regarding adjusting prices to charge larger, wealthier organizations more than smaller organizations, preferring to stay at the low end of the price scale for all clients. Jim rationalized, "I don't want to be a pig," insinuating that charging clients higher fees constituted being greedy. Marsh's (2008) sole proprietor consultants in the public sector similarly expressed tension and guilt about charging too much (200), and Kleinman

(1996) observed similar dynamics in a healthcare nonprofit, in which members "could only suggest raising fees a small amount" and "had to express ambivalence about the raise," to avoid a perception of ignoring constituent needs (20). To this point, one day in the InsightSolutions office I sat with Zelda, a partner, in her office as she described a personal business plan she had created, which detailed how she desired to spend and charge for her time over the next years. In the plan, Zelda proposed delegating a substantial amount of client communication to a less-expensive staff category: "More conversations with me increase cost [for the client] and I'm pretty adamant that we shouldn't raise our prices. I think they are already high--someone is paying $190/hour for my time? That's crazy!" Hourly rates at InsightSolutions were calibrated to a level that consultants felt was appropriate in their relationships with nonprofit clients, to avoid the perception of taking advantage.

Many consulting firms also billed for their work as a "fixed fee" in which clients paid a predetermined amount at set intervals, rather than consultants charging hourly. This strategy limited the number of conversations consultants needed to have with clients about payment, and avoided the perception that consultants billed clients for every moment they dedicated to a project. Jim explained,

> What I like about working for a fixed fee is that someone would call up and say, "Hey, I know this isn't part of our contract, but I got this issue we're thinking about. Can we bounce this off you?" I don't want them to be thinking, "I'm gonna ask Jim a question and he's gonna send me a bill for a buck and a quarter."

Jim felt that billing via fixed fee distanced his relationships with clients from the idea that clients were paying consultants for every moment of service.[113] Natalia from FocusImpact articulated a

[113] Marsh (2008) similarly found that women working as sole proprietor consultants in the public sector resisted treating their consulting as a transaction. This behavior also recalls Rossman's (2014) arguments regarding how actors engaged in exchanges of dubious morality restructured their transactions to avoid exchange taboos.

similar rationale, saying that charging a flat fee "is set up for overrun to happen. In a way it would be smarter if we charged hourly, but then you feel like you're counting and nickeling and diming every hour, and you don't want them to feel like if they are calling you for half an hour they are being billed. That's not a great feeling." She acknowledged that flat fee billing exacerbated consultants' tendency toward overrun, but prioritized avoiding the uncomfortable perception that consultants were "nickel and diming" clients, which might undermine consultants' desire to enact genuinely supportive relationships with clients.

As part of managing a fixed-fee-with-overrun billing system, at times consulting firms informed a client that the firm was offering extra services free of charge. As Arthur from ArtsNow put it, "We bill for scope, not time--we know we invest extra resources in our clients. There's no reason we shouldn't share that [with clients]." At InsightSolutions, for example, there was a time at which the firm listed pro bono hours on invoices for Historic Park; however, it discontinued this practice after a period of time. As Ines put it, "I haven't checked [for how much extra time has been contributed] since $78,000." She elaborated in another meeting. "I stopped [tracking and listing pro-bono time]. I don't know why. Because it took an hour just to do that." Usually, though, InsightSolutions did not communicate this extra effort to clients.

To recap, consultants engaged in pricing and billing practices meant to manage frequent cost overruns while maintaining supportive relationships with clients and bolstering consultants' professed mission-oriented identities. Consultants charged fees to align with clients' available budgets, even if this led to overrun, and calibrated prices to avoid the perception of overcharging clients. Consultants also billed via fixed fees, to distance the consultant-client relationship from the idea that clients paid for every moment of service.

Nickel and Diming Expenses

Within consultants' broader preoccupation with managing overrun while avoiding the perception that they were over-charging or taking advantage of clients, consultants engaged in what I call "nickel and diming." However, rather than the "nickel and diming" of *clients* that Natalia claimed FocusImpact avoided via fixed-fee billing, consultants "nickel and dimed" *themselves* to keep the amount they billed clients in check. For example, after an offsite Historic Park client meeting, Ines, Margaux and I discussed how we would get back to the office, debating taking a taxi or the local trolley. Ines cautioned, "I can't promise you'll be reimbursed. I'm taking my own Uber but paying for it myself." Ines opted to personally absorb the cost of a taxi to avoid confronting a client budget that was already in overrun.

ArtsNow consultants also sometimes[114] "nickel and dimed" their own expenses to keep what they charged clients to what they perceived was a reasonable amount. One day in the ArtsNow office, Anna worked out her plans for travel to and from a client site in another state. She booked herself to arrive home at one o-clock in the morning after a strenuous travel day because, as she put it, she could not book another hotel night on the client's dime. As she explained to me, when travel expenses were charged in addition to ArtsNow's fee, she and her colleagues tried to be reasonable. ArtsNow's clients "are all nonprofits operating on limited budgets, so we don't want to go overboard." As another example, Lena, a lower-level InsightSolutions consultant, told me that despite a loose company expectation to bill time in 15-minute increments, she did not enter her time daily--there were times when she was better and

[114] This was not always true--it seemed as though ArtsNow consultants adjusted their practices based on whether they perceived that the client had sufficient funds to pay for consultants' incidentals without hardship. ArtsNow's work also involved much more travel than did InsightSolutions,' so the question of who paid for incidental expenses was presumably more consequential for ArtsNow's business model than it was for InsightSolutions.

worse about it, but she never got in a habit like another staff member, who was constantly updating. She told me that she often felt guilty--like she had spent too much time on a task and did not want the client to have to pay. To manage this guilt, she explained, she would "say something took two hours when it really took four."[115] Similarly, other InsightSolutions consultants often under-represented the amount of time they spent on client projects to avoid charging clients for what consultants perceived as administrative work for which the client should not pay (such as project planning), which led to a situation in which InsightSolutions consultants did not bill enough of their work to clients to cover overhead costs.[116]

Consultants also sometimes passed cost savings along to clients, rather than using efficiencies to support firms' profit margins. For example, despite urging by the Anita, InsightSolutions partners insisted on charging clients low rates for labor by Research Assistants, a newly-created position charged with tasks that used to be performed by higher-paid staff members. Discussing this with me in her office, door closed, Anita was nonplussed. "Why should we transfer that discount to the client? We figured out how to do it cheaper." However, this perspective fell flat among InsightSolutions leadership. InsightSolutions declined to take advantage of potential savings the firm could have accrued by realizing efficiencies in its work process, seeing these efficiencies as instead opportunities to save its clients money--this latter strategy felt appropriate to nonprofit work.[117]

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[115] The dynamic of under-reporting billable time has also been observed at consulting firms serving the corporate sector, particularly when lower-level staff desired to hide inefficient work (see Deetz 1995). However, Deetz analyzed this behavior as a source of inefficiency in which the employee wrongly favored the client over the employer, rather than a strategy for reinforcing relationships with clients and supporting consultants' identity.

[116] After significant work by Anita, InsightSolutions' managing director, the firm later implemented a set of standard categories staff used when logging their time, to clarify which tasks "counted" as billable in client work.

[117] Consultants did not always engage in such "nickel and diming" of themselves. For example, one InsightSolutions staff member told me somewhat conspiratorially about her perception that another

It is important to note that these practices were not without tension or anguish. Consultants often oscillated back and forth between concern for their firms' bottom line and a commitment to serve their nonprofit clients regardless of cost, feeling guilty when they deprioritized their own firms, especially when money was tight, or staff were unhappy. Consultants also fluctuated between describing their work as driven by nonprofit standards and business norms.[118] Regardless, via these pricing and billing practices consultants emulated behavior they felt was appropriate in the nonprofit sector, and that correspondingly aligned with their mission-oriented identity performances. These dynamics speak directly to a Zelizerian understanding of financial transactions as morally laden, in which transaction participants define their relationships to one another through the transaction at hand. Consultants marked expected relationships between themselves and their clients via their pricing and billing practices, time management, and the quality of deliverables, interpreting these practices as either supporting or undermining their performances of mission-oriented identities and the morality of their relationships with nonprofit clients and the broader sector. In this way, consultants' business practices became entwined with members' senses of self, such that what was appropriate for the business and for its members converged. In Zelizerian terms, consultants crafted pricing and payment systems that sustained the integrity of a caring client-consultant relationship as well as consultants' mission-oriented identities.

InsightSolutions consultant was continuing a contract and spending money without admitting that the work was unproductive, out of fear or being fired or making the client upset. Additionally, ArtsNow had a largely different approach to billing and managing clients' money, as I previously discussed.

[118] For example, at one point Jim critiqued a draft report I produced, suggesting that I reorganize the document to correspond with how "[we organize arguments] in business."

Shifting Institutional Orientation: Consultants as Careworkers

The ways consultants named and described their work also implicitly shifted the institutional field relevant to consulting firms from management consulting to the nonprofit sector. Key to this shift was framing management consulting as carework. By highlighting the caring and therapeutic elements of their work, consultants made an implicit argument that the work they did aligned with nonprofit professions more than or in addition to corporate management consulting. To reinforce their positioning within the nonprofit sector, some consultants correspondingly called themselves "capacity building organizations" rather than consulting firms, and evaluated their work using standards imported from nonprofits.

Corresponding with consultants' displays of emotional buy-in to clients' work, InsightSolutions members frequently highlighted the centrality, in their work, of managing client representatives' emotions as they shepherded clients through lengthy, ambiguous planning processes while maintaining clients' confidence and preserving their morale. Through this process, consultants described themselves as providing therapy for their clients--emotional labor they saw as essential to working in the nonprofit context. As Arthur told me, sitting in his office, "I often feel like a therapist without an MSW."[119] Marie, a midlevel InsightSolutions staff member, described this therapeutic role during a whole-team meeting at InsightSolutions, sharing her experiences from when she was the managing director of a local theater. She said that her organization hired a consultant to help with a capital campaign, and this consultant performed very helpful "emotional labor, the reminder that [in this case, a capital campaign] is hard and we have tasks to do." The consultant played a therapeutic role, "ushering us along while we were at the brink of crisis at all times." Referring to consultants' work as therapeutic defined

[119] Master's degree in Social Work.

firm members' roles vis a vis clients as incorporating a caring element beyond their technical and process expertise--consultants were not there simply to deliver external expertise or facilitate process, but instead, as in the case of capital campaigns, were "helping clients cope with disappointments and the ups and downs of campaigns"--guiding the client through whatever emotions came along with planning. This sentiment echoed Ines' words earlier in this chapter; she had lamented feeling like a "failed therapist" due to her inability to adequately tailor proposed solutions to her client's mental state.

Consultants at other firms beyond InsightSolutions similarly spoke about their work as therapeutic. In an interview, Natalia from FocusImpact told me that she often played a "therapeutic role" for her clients. She explained, "understandably, people get nervous about change, so our work becomes very personal. People share [their concerns] with us, we become this confidant because we are a third party." She described how client representatives shared their fears about planning-related changes with her and her colleagues, relying on the consultants to help manage interpersonal disputes and challenges. Isabel from ArtsNow similarly told me that "providing therapy for clients" was "a big part of my job." She attributed this to her perception that "in nonprofit work no one separates work and life"--nonprofit workers, she felt, were likely to share personal details with consultants, meaning that responding to and caring for clients' emotional needs was a significant part of her work.[120]

To help preempt and tend to clients' emotional responses, InsightSolutions commonly used a graphic to help clients understand the emotions they were likely to feel at different points in a planning process. The graphic was titled "Strategic Planning Journey" but Jim at one point suggested that that the chart could be applied to any project type:

[120] Regardless of whether Isabel's explanation of *why* clients shared personal reactions with her was true, Isabel felt that providing therapy to clients and caring for their personal reactions was part of her job.

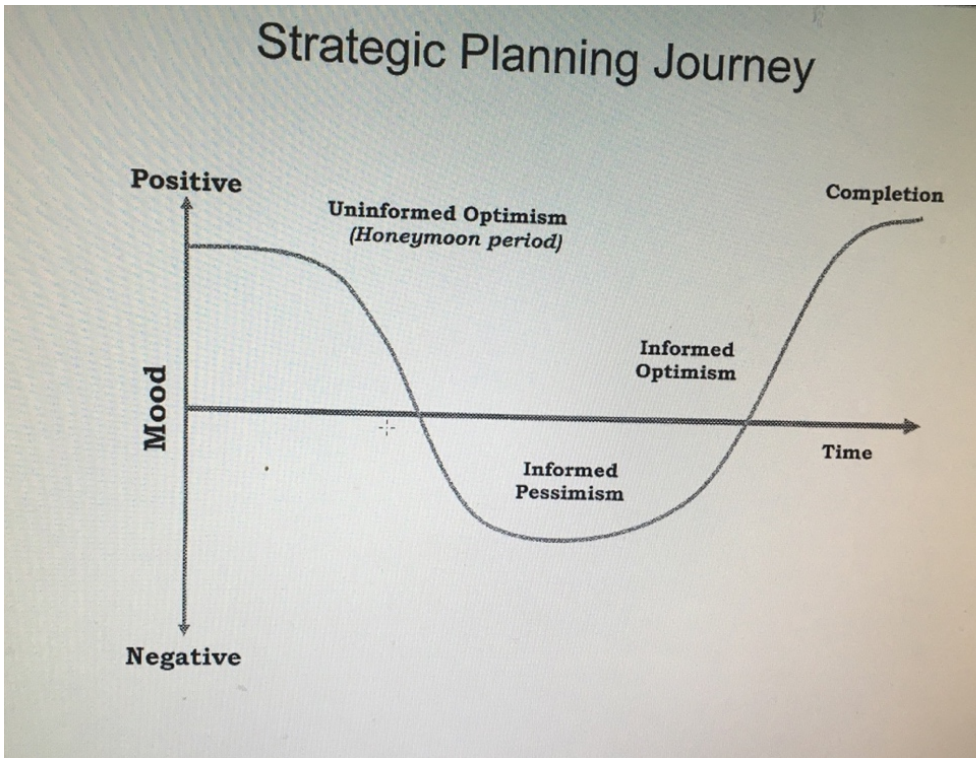

Illustration 15: The Strategic Planning (Emotional) Journey

In the consulting journey, clients were expected to begin the process feeling positive--excited about its potential to deliver meaningful results. During what the graphic designates the "Honeymoon Period," the client was to experience "Uninformed Optimism"--still in the dark about the inevitable complexity to come, the client felt as though the process was going swimmingly. As the complexity or direness of his or her situation emerged, through the subsequent steps of the planning process, the client transitioned across the "zero" mood line into the negative plane, experiencing "Informed Pessimism." As the process began to draw to a close, the client recovered to a state of "Informed Optimism," as solutions began to take shape. In this idealized diagram, at the conclusion of the planning process the client had recovered to the same level of optimism with which he or she began the process. This attention to clients' emotional

experiences helped mark genuinely supportive consultant-client relationships, in which consultants performed understanding, empathizing with, and actively managing the psychic and emotional stressors of working with consultants.

At InsightSolutions, key to consultants' therapeutic role was the notion of "functional empathy." As Ines put it, "we use a lot of functional empathy here, and ask a lot of questions we know the answer to, because we are there to understand stuff [clients] don't talk about--how they communicate and make decisions in the organization, the circumstances of the organization and if the group is all on the same page. We use active listening skills." She used the same phrase, "active listening" as claimed by Sturdy (1997) to constitute consultants' efforts to reframe client problems in terms of existing services. However, at InsightSolutions "active listening" was part of consultants' empathetic orientation toward clients. According to InsightSolutions' website, "functional empathy" indicated "respect and understanding" for client circumstances. In an interview, Ines defined it more eloquently:

> So someone's acting a certain way. Your client's acting a certain way, your colleague's acting a certain way, a staff member's acting a certain way. Okay, what's their function in the agency? What's their role? What's going on in the agency? How are they feeling right now? Then [our work is] understanding where that behavior is coming from [and figuring out what the person] needs to be able to be the best executive director they can be, the best consultant they can be, the best project manager they can be.

Functional empathy, for InsightSolutions staff, entailed empathizing with and attending to the feelings and needs of client representatives in the context of organizational dynamics and change, identifying sources of tension and behavior, and diagnosing and providing the support and recommendations the individual needed to best perform his or her role.[121]

[121] Consultants' focus on functional roles in this definition aligns with their tendency, described in Chapter 4, to focus on formal organizational structure in diagnosing clients' problems and solutions.

Isabel from ArtsNow explained that her past experience leading a symphony led her to empathy for clients' emotions and reactions. "I know that when I ask them for things, they are also just trying to make payroll. So I know what they are going through." As a fellow nonprofit professional, Isabel empathized with her clients' reactions and the pressures of undergoing planning while trying to stay afloat. Enacting functional empathy and a therapeutic approach entailed, for consultants, privileging client emotions such that consultants' interactions with clients and eventual recommendations took into account individual client representatives' needs and struggles as nonprofit professionals and as people.

In highlighting the emotional and empathetic dimensions of their work, consultants framed consulting as a type of carework. Other scholars have written about the significant role of emotions in economic activity (i.e. Bandelj 2009), and Marsh (2008) outlined the role of emotions and empathy in the work of public sector sole proprietor consultants. I intend, in calling consulting carework, to reference England's (2005) definition of carework as "those occupations providing a service to people that helps develop their […] intellectual, physical, and emotional capabilities," and which contribute to development and happiness for recipients of care and others. Carework professions are many and typically include childcare, teaching, and healthcare workers, among other occupations, where work is largely performed by women.[122] As England (2005) synthesized, carework has been thought to create public goods, "diffuse social benefits beyond its immediate beneficiaries" (386). Central to the definition of carework is also the idea that careworkers are motivated, to some extent, by genuine care, "concern about the

[122] Note that consultants did not themselves use the term "carework" to describe their work--I use this term in my analysis to summarize how consultants talked about their work. Relatedly, Marsh (2008) argued for the similarity between the consultant role and tasks traditionally considered "women's work." To this point, the gendered element of consultants' work, especially of the "therapeutic" labor consultants discussed, is analyzed in Chapter 7.

recipient's welfare" (389), and altruism, and that carework "encompass[es] both instrumental tasks and affective relations […] careworkers provide love as well as labor." (389). Relatedly, many carework occupations have traditionally taken place in nonprofit organizational contexts (for example schools and hospitals), though for-profit models also exist in most cases.[123] As such, as consultants spoke about the ways they cared for their clients' emotions, they defined their work as similar to typical nonprofit occupations--specifically those that created public goods, were motivated by genuine care, and involved both instrumental and emotional labor. As I argued earlier in this chapter, this framing was reinforced by consultants' emotional buy-in to clients' work and ongoing attempts to demonstrate that they were more invested in social impact than financial compensation.[124]

By defining consulting as carework, consultants strove to perform being nonprofit--that is, consultants acted out their mission-oriented identities and solidarity-based relationships with the nonprofit sector, attempting to demonstrate that their work entailed genuinely caring for nonprofit clients' wellbeing. In doing so, consultants implicitly argued that their work was similar to typical nonprofit professions, thus shifting the institutional field to which they were oriented from management consulting to the nonprofit sector.[125]

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[123] Therapy as a profession often takes place in for-profit contexts, as therapists frequently operate as independent sole proprietor business owners.

[124] In framing their work as caring, consultants' efforts recalled similar cases in other fields. For example, in the case of life insurance in the nineteenth century, insurers framed life insurance in terms of caring for loved ones in order to overcome customers' initial resistance to assigning a monetary value to a family member's death (Zelizer 1979). Additionally, Mears (2015) analyzed how party promoters attempted to frame relationships with women working in VIP nightclubs as friendships. Across these cases, professionals shifted the definition of their work and relationships with clients or customers to convey a sense of genuine connection and mutual care, and distance their work from financial exchange.

[125] It is relevant to note that some scholars suggest that consultants and nonprofits are subject to similar isomorphic pressures, which might lead consulting firms to reconstruct rather than challenge the nonprofit field's prevailing legitimacy criteria (Kontinen and Onali 2017:12).

Consulting Firms as Capacity Building Organizations

Some consultants also sought to distance themselves from the "consulting firm" identity, which further shifted the institutional field to which nonprofit consultants were oriented from management consulting to the nonprofit sector. In an email, a professional association comprised primarily of consultants to nonprofits offered the following as a webinar topic in the coming year: "What Makes a CBO [Capacity Building Organization] More Than a Consulting Firm? (underlying values, point of view, etc.)."[126] Association members felt more comfortable with the name "Capacity Building Organization," which directly supported the framing of consultants' work as carework and aligned consultants' work with the nonprofit sector, than with calling themselves "consulting firms."[127] The effort to define such firms as "organizations" rather than "firms" reinforced the repositioning of consulting firms as within the nonprofit sector, and the attempt to highlight consultants' altruistic purpose by including "Capacity Building" in their name bolstered the notion of consulting as carework.

Consultants also sometimes used standards from nonprofit organizations to evaluate their work, supporting their efforts to reorient consulting toward the nonprofit sector. Specifically, when InsightSolutions revamped its performance evaluation procedures for staff, the firm chose a model based on a large local nonprofit organization. In describing the merits of the new system to me, Anita explained that it was "more open-ended and more flexible" than InsightSolutions' previous system. The new system, she continued, focused on qualitative, rather than numerical, bases of evaluation. Rather than evaluating staff according to their ability to carry out the

[126] Note that some of the organizations claiming the moniker "Capacity Building Organization" were nonprofits, and some were for-profits or B-Corporations.
[127] Marsh (2008) found similar behavior among women working as sole proprietor consultants in the public sector, reporting that these consultants sometimes "elided their status as [sole proprietor] businesses."

different steps of the consulting process, for example writing "findings documents," in the new system staff evaluated themselves based on twenty-six competencies, such as "problem-solving" and "accountability to clients." InsightSolutions thus adopted an evaluation framework that, while customized to its work, was based on a model from the nonprofit sector. Indeed, FocusImpact also imported nonprofit sector-aligned evaluation criteria into their work--by adopting a B-Corporation structure, the firm agreed to be evaluated by a third party on the basis of the social responsibility of its practices.[128]

In sum, via these practices, consultants implicitly shifted the institutional field to which their firms were oriented from management consulting to the nonprofit sector. By highlighting the therapeutic and caring elements of their work, consultants inherently redefined consulting as carework, aligning their work with typical nonprofit occupations and highlighting the genuinely caring and altruistic bases of their practice. To narrow the distance between their work and the nonprofit sector, consultants sometimes applied nonprofit performance evaluation approaches to their own work and correspondingly distanced themselves from the consulting industry, renaming their firms "Capacity Building Organizations." By implicitly positioning their work as similar to and emulating nonprofit practices and motivations, consultants marked genuinely supportive and solidarity-based relationships with nonprofit clients.

Mirroring Nonprofits in Consulting: Unintended Consequences

As this chapter has shown, consultants went to great lengths to mark their relationships with nonprofit clients as based on genuine support and solidarity. Consultants talked about their work in certain ways, and chose strategies for doing and charging for their work that they felt

[128] This move also reinforced FocusImpact's image as a trusted partner to nonprofits.

were appropriate in a nonprofit context and that bolstered consultants' performances of mission-oriented identities. Specifically, consultants professed commitments to social change over financial compensation, avoided profit-oriented language, "nickel and dimed" their own expenses, and engaged in scope creep and overrun to act on their commitment to quality work.

In doing so, consultants *mirrored* what they perceived to be nonprofit characteristics and practices in their own work, as they strove to be viewed as legitimate and trustworthy partners to nonprofits. A FocusImpact consultant described the result of this situation in an interview. "What's interesting in this work, is that I still feel like I'm in the nonprofit sector, but this is a for-profit organization!" Indeed, profit-avoidant structures and practices and personal commitment by staff members to organizational mission and beneficiaries are commonly cited as core elements of and stereotypes about organizations and work in the nonprofit sector (See Aakers, Vohs, and Mogilner 2010; National Council of Nonprofits 2014). Critically, however, as I have mentioned in the course of this chapter, emulating these practices at times caused consultants to act in direct contradiction to their firms' financial best interest and replicate stereotypical nonprofit problems in their own firms.[129]

The Unintended Consequences of Nonprofit Solidarity: Profit Problems

Consultants' tendency toward scope creep and overrun, "nickel and diming" their own expenses and passing along cost savings to clients led consultants to inadvertently undermine their firms' bottom lines. As a result, while individual consultants were still paid their

[129] Note that I focus primarily on the cases of InsightSolutions and FocusImpact in this section. ArtsNow's practices, as I showed in this chapter, were different in important ways than these generalist firms. ArtsNow's differential focus on firm profit and firmer boundaries regarding budget-based client eligibility meant that the firm was less prone than these generalist firms to the problems, at least the profitability issues, that I discuss in this section.

contractually defined salaries, consulting firms ran into profit problems, and consultants' salaries resembled nonprofit levels.[130]

As I described earlier, during my fieldwork, both InsightSolutions and FocusImpact experienced ongoing difficulties completing projects within budget, such that the projects broke even or produced net revenue for firms. As FocusImpact team members discussed in their all-team offsite meeting, FocusImpact "trained the staff to do high quality work, but it's not profitable." When mid-career consultant Emily presented the budget actual figures for the team over recent years, shock registered on consultants' faces around the table. All but one project showed negative numbers for the money FocusImpact made on the project. Similarly, as I mentioned previously, many strategy projects at InsightSolutions went into cost overrun. Ines and other InsightSolutions consultants excitedly told me when a project in which I participated *did not* result in a loss to the firm, partially because InsightSolutions did not compensate me as per our agreement about my fieldwork. While InsightSolutions had, in recent years, created a managing director role and hired Anita to try to rectify the firm's problems with efficiency and profitability, firm leaders struggled to adhere to and incorporate her recommendations because Anita's business-oriented vocabulary and approach to InsightSolutions' work conflicted with the mission-oriented language and practices for pricing, billing, and allotting effort to work with which consultants felt comfortable.[131] In this context, the firm continued to struggle to generate surplus revenue.

Consultants' efforts to charge for and do their work in a fashion that they felt genuinely supported their nonprofit clients simultaneously undermined their own firms' bottom lines. Given that consulting firm leaders equated profit with the ability to better compensate staff, as a

[130] This finding mirrors Merton's (1936) notion of unanticipated consequences in purposive social action.
[131] I will elaborate on this point in the remainder of this section.

corollary of this situation salaries at InsightSolutions remained close to nonprofit levels. Salaries at FocusImpact and ArtsNow, though higher than InsightSolutions salaries, remained below those typical in the management consulting industry.[132]

The Unintended Consequences of Nonprofit Solidarity: Replicating Nonprofit Problems

In addition to impacting firms' finances, consultants' practices to enact and reinforce relationships of support and solidarity with clients also led consulting firms to replicate typical nonprofit problems. Notably, some of the problems consulting firms experienced were the same or similar to those consultants helped solve in their work with client nonprofits. In this context, consultants' own behavior in their firms often contrasted sharply to what they recommended to clients. Indeed, some consultants were aware of this contradiction. As Lucy from FocusImpact put it, describing FocusImpact's attempts to reform its internal operations, "we're trying to live what we preach to our clients, which is usually absurd because nobody does." In working out their relationships with nonprofit clients, consultants reproduced and re-embedded some of the same problems in and assumptions about nonprofit work in their own firms that they sought to dispel in their clients.

Consultants' treatment of profit as a taboo concept and their marked willingness to provide more services than they were compensated to perform directly contradicted consulting firms' frequent recommendations to clients that resource flow and careful financial management were central considerations for effective nonprofit functioning. Additionally, while consultants often spent a significant portion of clients' strategic planning processes focused on organizing,

[132] Note that there was significant variability in these salaries, both between firms and between industries. While the situation I described in this chapter contributed to salary depression among consultants to nonprofits, it was not the only such contributor. For example, the rigid nonprofit budgets for consulting that I discussed in previous chapters also played a role in this situation.

strengthening, and improving clients' internal operations, InsightSolutions and FocusImpact staff often told me that their firms prioritized client work over administrative obligations. At InsightSolutions, this led senior staff to avoid spending time on organizational management and operations. Margaux put it clearly on the way back from a mid-afternoon coffee with Ines and I: "we consider client work as direct service, and administration as overhead. And we value the direct service more." Ines agreed, saying she had not heard it put so well before. In this statement, Margaux re-interpreted InsightSolutions' business within a nonprofit framework of direct service versus overhead. She pointed out that the fact that InsightSolutions consultants valued tasks that could lead to social impact and revenue (client work) over internal operations led the firm to reproduce a pernicious dynamic in nonprofit organizations--the de-prioritization of management, administrative, and operations needs to prioritize programmatic work, which both staff and funders felt was more important (National Council of Nonprofits 2014). At InsightSolutions, staff *cared more* about client work, thus prioritizing it over administration and operations.

As Ines further explained, the presence of a "dismissive attitude about admin" among some InsightSolutions staff and perception that attention to things like human resources was not a firm priority contrasted directly with what InsightSolutions recommended to clients. In Ines' perspective, this attitude derived from what Ines called InsightSolutions' "high-touch, highly customized approach" in the context of "such a low profit-margin business." The fact that the firm's commitment to quality-through-customization often led to cost overrun further lessened consultants' incentives to spend time on internal management and operations, as consultants endeavored to produce high quality work for clients under time and resource constraints. At FocusImpact, this manifested in firm expectations that staff spend the vast majority of their time

on billable client work, without allocating sufficient staff time to accomplish the many non-billable administrative and management tasks that needed to be completed. As a result, staff struggled to fit non-billable work into their schedules, even as they simultaneously struggled to complete their client work within the time and budget targets that would prevent the project from going into overrun. As one FocusImpact consultant put it, "if you actually want to contribute to the culture building of the firm, the marketing efforts of the firm, the firm anything really, it's additional [work] tacked onto [an already overwhelming workload]." At FocusImpact this led, among other effects, to strong siloes and a lack of communication between firm practice areas, and to a perceived disconnect between client-facing and internal operations-oriented staff. The fact that consultants' definitions of quality work and practices for budgeting and allocating effort to projects frequently led to cost overrun left no time or incentive for administrative and operations work in consultants' days.

Relatedly, despite consultants' tendency to highlight the importance of formal organizational structure in nonprofit success, InsightSolutions' leaders struggled to craft and adhere to standard procedures for their work. This situation sprang both from senior staff members' hesitance to devote time to internal firm management and operations, and from consultants' commitment to providing highly-customized work, which made standardization feel inappropriate. For example, each InsightSolutions partner was known to have his or her own preferred writing style and document format. Anita, InsightSolutions' managing director had, at various points, broached the subject of establishing a standard deliverable format for the firm, to streamline arduous editing processes. However, during my time at InsightSolutions this was a non-starter--firm partners were committed to retaining their stylistic autonomy and what they perceived as a high level of customization of deliverables, reacting to standardization attempts as

contrary to their professed buy-in to clients' work, which necessitated a high degree of customization. InsightSolutions also had clients for which they started, continued, or did work without a contract in place, much to the chagrin of Anita.

Indeed, much of Anita's job consisted of trying to craft standard procedures for InsightSolutions' work, including pricing, invoicing and collections systems, consistent project management procedures, and processes for business development. However, Anita struggled to get InsightSolutions leadership to focus on these items as firm priorities, and to adhere to new procedures once they were in place, leading to frustration and duplication of effort on her part. Senior InsightSolutions leaders were busy with client work to which they were deeply committed and attached, leading them to deprioritize focusing on such internal matters and standardization attempts, regardless of their potential to improve the firm's overall health.[133]

Finally, for similar reasons, consultants struggled to prioritize their efforts. While they ubiquitously promoted clarity, focus, and linear planfulness as important to effective nonprofit organizations, consultants did not consistently apply these recommendations to their own work. During my fieldwork at InsightSolutions, the firm was in the second year of its own strategic planning process, which was taking longer to complete than planned due to a lack of time and priority among InsightSolutions senior staff. Anita, who facilitated meetings of the firm's partners to make progress on the strategic plan, struggled to get the partners to make decisions and prioritize among their goals to come to consensus on a future plan. Anita's struggles were heightened by her tendency to present information using straightforward business terminology, charts, and graphs. This at times prompted InsightSolutions partners to question or redirect

[133] We could also take a more critical view of this phenomenon, and what it implies about InsightSolutions' leaders' ability to effectively lead the firm. I choose to focus instead on how such problems at InsightSolutions contradicted the firm's recommendations to client nonprofits.

attention from Anita's analyses by using identity talk to reinforce their mission-oriented identities and articulate discomfort discussing the firm's operations within a business framework. Many meetings returned to issues that had nominally been decided in previous sessions, as the partners struggled to settle on priorities and expressed intermittent urgency and discomfort with addressing the firm's need for revenue growth to achieve profitability. As Anita explained to me, disheartened, the firm's partners were "trying to change multiple variables at the same time and making it unnecessarily complex." She told me that she had looked at some of the strategic plans that InsightSolutions consultants had written for clients, and they "aren't the same as the process they are using on themselves."

Discomfort on the part of senior firm leadership with focusing on revenue growth and profit, combined with the tendency of these same leaders to deprioritize internal operational matters, led to difficulty in establishing clear foci and plans for InsightSolutions' future. Indeed, FocusImpact struggled in some similar ways. At the nonprofit strategy team's whole-team meeting, the group settled on a project everyone wanted to tackle as a high priority. Natalia stopped the group, smiling widely. "Good consensus, guys!" Andrew smiled wryly. "We actually prioritized! We never do this!" Despite recommending clarity and focus to their nonprofit clients, consulting firms struggled to apply these principles to their own practice.

Summary: Mirroring Nonprofits in Consulting

To summarize, in working to mark relationships of genuine support and solidarity with nonprofit clients, consulting firms adopted practices that consultants perceived to be central to acting appropriately in the nonprofit sector. Consultants professed commitments to social change over financial compensation and avoided business language to describe their work,

correspondingly providing more work to clients than they were compensated to deliver, and adjusted their pricing and billing strategies to keep fees to a level they felt was reasonable. Consultants emulated these practices both to build relationships as trusted partners to their clients, and to reinforce consultants' own claims to mission-oriented identities.

In the process, consultants sometimes acted in direct contradiction to their firms' financial best interest and to the recommendations for good practice that they promoted to clients. I call this phenomenon *mirroring nonprofits* in consulting. Consulting firms often failed to serve as a model of the practices their staff promoted to clients, including prioritizing to establish a focused plan to achieve organizational goals, establishing strong formal organizational structures and procedures, investing time and energy in functional administrative and operational systems, and carefully managing resource flows. Instead, consultants provided more work than they were compensated to perform, prioritized client work over administration and operations, and sometimes struggled to prioritize and adhere to consistent procedures for their work. Perhaps ironically, what consultants felt was normative in the nonprofit sector and necessary to demonstrate relationships of genuine support to their clients led consulting firms to replicate typical nonprofit problems in their for-profit companies. In this way, consulting firms' efforts to demonstrate solidarity with their clients *mirrored* nonprofit practice, making consulting firms more like the nonprofits consultants sought to reform.

Conclusion

As for-profit businesses serving the nonprofit sector and made up of nonprofit professionals, building and maintaining solidarity with nonprofit clients was of paramount importance to consulting firms like InsightSolutions, FocusImpact, and ArtsNow. Genuine

relationships with clients supported both firms' legitimacy and credibility as partners to nonprofit organizations, and firm employees' professed mission-oriented identities. However, consultants to nonprofits struggled to craft such relationships with clients while simultaneously advancing their firms' bottom lines. In this chapter, I analyzed three interlocking sets of practices by which consultants to nonprofits attempted to emulate behavior within for-profit firms they felt was appropriate in their relationships with nonprofit clients. Via identity talk, moralizing money, and redefining consulting as carework, consultants strove to mark relationships of genuine support and solidarity with nonprofit clients, relationships that in turn supported consultants' strongly-expressed identities as mission-oriented careworkers. Via these practices, I showed that consultants distanced themselves from the consulting industry and from revenue growth and profit as a goal, instead highlighting their commitment to social impact. As they put these professed ideals into practice in how they priced, conducted, and billed for work, consultants emulated what they perceived to be nonprofit-appropriate practices in their own firms, and implicitly shifted the institutional field to which their firms were oriented from consulting to the nonprofit sector.

In doing so, consultants sometimes acted in direct contradiction to their firms' financial best interests, and to the recommendations for good practice they delivered to clients, in a process I call *mirroring nonprofits* in consulting. Consultants replicated common nonprofit problems in their own firms, including providing more work than they were compensated to perform and prioritizing client work over administration and operations. By applying what consultants perceived to be nonprofit norms to their own internal operations and replicating common nonprofit problems, consulting firms *became more like nonprofits*. These dynamics illuminate how consultants to nonprofits managed conflicting motivations and impulses at the

border between two sectors, employing relational work both in client-consultant interactions and internally with their colleagues to justify their activity and its outcomes to multiple audiences.

These findings provide an opportunity to advance literature on consultants' and other intermediaries' role in institutional diffusion. Literature on institutional diffusion focuses on consultants as carriers and translators of ideas into new settings (Sahlin-Andersson and Engwall 2002). In this literature, consultants and other intermediaries are framed as agents of normative isomorphism--the spread of similarly-trained professionals across a field, such that the practices and structural elements these professionals treat as normatively superior diffuse along with the professionals themselves. In this context, the fact that consulting firms *mirrored* nonprofit practice in their own work is both surprising and entirely expected. Scholarship on consultants as carriers of management knowledge tends to focus on the *objects or targets* of diffusion (i.e. specific organizations, organizational fields, and national contexts) (Abrahamson 1991; Kennedy and Fiss 2009; Fiss and Zajac 2004) or the consultant-driven diffusion of particular models (e.g. Patterson and Kaufman 2016). In this literature, consultants' own practices are held constant, as vehicles of diffusion and inter-organizational homogeneity. In investigating these practices, this chapter shows that in the course of consultants' work with clients, practices can diffuse *in reverse*--not only from the agents to the nominal objects of diffusion (i.e. from consultants to nonprofits), but also from the objects to the agents of diffusing ideas (i.e. from nonprofits to consulting firms).

Ironically, within this surprising finding is an entirely expected one--as this chapter has shown, consultants to nonprofits replicated conventional nonprofit practices and forms of talk in their own work because consulting firms were populated with nonprofit professionals. As such, consulting firms that work with nonprofits are both agents *and* objects of normative

isomorphism--while such firms are thought to diffuse new ideas across nonprofits (an argument that this dissertation explains and complicates), they are also objects of the diffusion of legitimated practices, as professionals trained in nonprofit management and with experience in nonprofits spread beyond the nonprofit sector and into consulting firms.

Chapter 7
Reproducing Hierarchies
Status, Expertise, and Funder Influence in Consulting

As this dissertation has shown, the consultants I studied did not promote homogeneity among their nonprofit clients. Instead of disseminating consistent ideas or models for organizational structure and management strategy across nonprofits, consultants paid close attention to their clients' unique attributes and needs, customizing their processes in ways that yielded variation in the models of good practice to which client nonprofits looked, and the recommendations consultants delivered to clients. However, as I have mentioned, not all consultants were alike. Firms varied in size, approach, and status, among other characteristics. In this context, consultants expressed strong feelings to justify their particular approach, and strove to maintain strong reputations and distinguish their work from that of other firms. Additionally, consultants did not work in a vacuum--other organizations, namely funders, significantly influenced consultants and their work. Unsurprisingly, these distinctions formed the basis of hierarchies within the consulting field and between consultants, funders, and clients.

As I will show in this chapter, the hierarchical structure of inter- and intra- organizational relationships in the field of consulting to nonprofits led consultants to consistently preserve certain characteristics of the nonprofit sector through their work, even while acting as agents of inter-organizational variation. Namely, while consultants produced variation, rather than homogeneity *in nonprofit managerial practice*, they left the larger hierarchies in which these practices were situated intact. To make this argument, in this chapter I analyze three specific relationships in the consulting field: power relationships between consultants, funders, and nonprofits; the division of labor between consulting firms of different size; and intra-firm

hierarchies. In each case, I show how hierarchies in the field of consulting to nonprofits led consultants to mirror and reproduce existing hierarchies in the nonprofit sector.[134]

After reviewing relevant literature on corporate consulting field structure, hierarchies in expert knowledge production, organizational gender dynamics, and theories of brokerage and cross-field effects, I first analyze the involvement of philanthropic funders in consultants' work. In contrast to corporate management consulting, the work of consultants to nonprofits was often paid for by a third-party funder. I argue that in this context, consultants' conflation of fund-ability and feasibility, the links between strategic planning and fundraising, and the resource dependencies in funder-consultant-client relationships in which both consultants and clients depended on funders for survival, led consultants to serve as conduits for funder influence over nonprofit organizations, reinforcing the former's power. Second, I describe the multilayered hierarchy between consulting firms of different size and approach that characterized the field of consulting to nonprofits. This hierarchy, I show, mixed status-based distinctions with the notion that different types of expertise--what I call *exotic advice* versus *collective wisdom*--were unequally valuable and differently gendered. I argue that via a division of labor between consulting firms, hierarchies between consulting firms reinforced similar hierarchies between nonprofits. Finally, I analyze intra-firm hierarchies in consulting to nonprofits. I show that field-level hierarchies related to status, expertise, and gender also affected work in individual firms, and describe how consultants invoked these hierarchies to explain negative client interactions and subsequently used them to advance work with similarly hierarchical clients.

[134] Insights from this chapter were included in an Op Ed that has been accepted for publication by the *Chronicle of Philanthropy.*

Together, these analyses[135] illustrate how hierarchies between different types of consultants, between consultants and other powerful field members, and within consulting firms led consultants to reproduce hierarchies between nonprofits rather than producing inter-organizational homogeneity.

Field Structure, Hierarchies, and the Intermediary Role

Field Structure and Status in Corporate Consulting

The literature about the structure and status dynamics of the corporate consulting field provides helpful context for my argument. First, scholars of corporate management consulting identified a relationship between consulting firms' size and the type of knowledge firms muster in their work. Clark and Fincham (2002) argued that major management consulting firms are clustered in major cities but work nationally and internationally. Faulconbridge and Jones (2012) explained that such firms' international reach leads them to rely on generalized, global sources of business knowledge rather than locally-informed or customized ideas in their work. Complementing large firms, smaller regional firms are more attuned to the particularities of local context and develop specialized expertise tailored to that context (Faulconbridge and Jones 2012).

Ambruster (2006) pointed out that this field structure contains a status hierarchy. Large corporations hire large, prestigious management consulting firms given the latter's association

[135] Across these topics, I analyze both consultants' *practices* (for example, how they incorporated funders' ideas into nonprofits' plans) and how consultants *talked* about their own and other' work (for example, their complaints about other consulting firms and accounts of unsuccessful client engagements). In these analyses, my goal is not to evaluate whether consultants' practices were advisable, or whether their complaints and accounts of others' work were valid or correct. Rather, my intention is to analyze the insights about hierarchies in the field of consulting to nonprofits (between and within firms and between consultants, funders, and clients) contained within consultants' practices and discourse.

with prominent business schools, from which both recruit many of their employees. Faust (2012) correspondingly wrote that consulting is a status market in which the highest-status firms charge high fees and restrict access to the most powerful client corporations, reproducing a status structure topped by prominent consultants and clients. Prominent firms' high fees, Faust argued, symbolize these firms' privileged position in the status hierarchy. This field structure resonates with Heinz and Laumann's 1982 study of the social structure of the Chicago legal bar. Heinz and Laumann found the field's major differentiator to be whether lawyers served large corporate clients or individuals, with the former allotted higher prestige than the latter perhaps because of the comparatively higher fees or intellectual challenge of corporate work. Using this work as a starting point, this chapter explains the characteristics of and dynamics between strata in the field of consulting to nonprofits, and explores how field structure and associated status hierarchies shaped consultants' work.

Inter-Organizational Relationships in the Management Ideas Field

Strang, David, and Akhlaghpour (2014) worked out the dynamics between these different field strata by investigating how innovative practices emerge and diffuse across the corporate management consulting field (see Abrahamson and Fairchild (1999) for more on this topic). They argued that consulting firms mimic their "highest-performing peers" in a bandwagon effect that results, over time, in the fading of particular management innovations and the rise of new ideas. When a prominent firm (the authors assumed prominence entails quality) debuts a new management innovation and disseminates compelling success stories, other firms and clients are drawn to the idea, causing increased competition. Over time, prominent firms leave this competitive market and debut new, competing ideas. Kipping and Wright (2012)

correspondingly suggested that small consulting firms indirectly act as translators of ideas that originated in major global firms.

In addition to the relationship between corporate consulting firms of different size and prominence, scholars have also analyzed relationships between consulting firms and other intermediary actors in the diffusion of management ideas. Suddaby and Greenwood (2001) outlined the relevant players. Business schools, they argued, analyze management practice, vet concepts, and provide a "shared cognitive foundation" for the legitimacy of management knowledge. Charismatic management gurus[136] in turn translate knowledge produced in academia into new communities. The business press disseminates knowledge produced by business schools and assists gurus in spreading ideas to new contexts. Consulting firms then make this knowledge sell-able by codifying and abstracting it. Finally, consumers generate demand for management knowledge. Stated otherwise, as new managerial practices emerge from corporations, business schools refine the ideas, gurus abstract and legitimate them, disseminating them through the business press, and consultants commodify the ideas. As consultants disseminate particular ideas through organizations, competition between corporations for access to management ideas builds, increasing demand for new concepts and causing the knowledge production and dissemination process to restart again.

While these studies provide helpful context for my analyses of inter-organizational relationships in the field of consulting to nonprofits, the corporate context lacks a crucial element that makes the nonprofit case unique--the presence of funding organizations as a third actor in consultant-client relationships. In this chapter, I describe the role of funders in consultants' work with nonprofits, and detail how consultants' relationships with funders and the ways consultants

[136] Prominent consultants, academics, or hero-managers (Clark and Fincham 2002).

take account of funders' preferences in strategic planning influence the ideas consultants promote to clients. Additionally, while existing literature provides a starting point for analyzing hierarchical relationships between differently-sized consulting firms, the case of consultants to nonprofits is again distinct from the corporate sector. Large consulting firms in the nonprofit sector are, like in the corporate case, higher status than smaller firms. However, inter-firm dynamics cannot be reduced to small firms copying larger ones, or firms' distinctions expressed only as local vs. global knowledge. Rather, these distinctions run deeper, touching on the nature of consultants' expertise and the knowledge they produce.

Expertise Hierarchies in Professional Service Work

As I will show in this chapter, small and large nonprofit-serving consulting firms laid claim to different types of expertise, a distinction that contributed to hierarchical inter-firm relationships. Such hierarchical distinctions between types of expertise are well-documented by prior scholars. While STS scholarship has illuminated the contingent and socially-produced nature of scientific knowledge, in modern society scientific expertise, framed as rational, authoritative, independent and "divorced from the experiences, competences, and comprehension of the ordinary public" (Shapin 1990:995) is often considered more valuable in decision-making than expertise derived from personal experience (Irwin 1995). Scholars have made similar arguments about quantification, which represents a desire for "mechanical objectivity" that replaces individual discretion with the perceived objectivity and legitimacy of numbers (Porter 1992). As Espeland and Stevens (1998) argued, such depersonalized knowledge is often "deemed superior to private, particularistic forms of knowing." Local and experience-based knowledge can be undermined by the parsimony of numbers that are perceived as authoritative

and self-evident (Espeland and Sauder 2007), though actors whose work is subjected to quantification often engage in resistance (Christin 2018). In both cases, expertise that is perceived to be objective and authoritative is considered superior to that based in personal experience and local context.

Gendering Professional Service Work

In this chapter I will show how consultants' critiques of each other's work invoked such arguments about the relative value of different kinds of expertise, and simultaneously *gendered* the resulting hierarchy. The entrance of gender into this story is not surprising--Acker (1990) argued that all organizations are deeply gendered, meaning that "advantage and disadvantage, exploitation and control, action and emotion" are patterned "in terms of a distinction […] between masculine and feminine" (145-6). To understand such gender dynamics in professional work, Martin (2003) argued that analysts must attend to how gender is enacted--the specific definitions of masculinity and femininity that professionals, including those in power, consciously or unconsciously perform at work. Such gendered performances are both based in practical knowledge derived from larger institutions (Martin 2003; Connell 1995; Butler 1990), and emergent in interaction (Schippers 2007).

As Ridgeway and Correll (2004) wrote, institutionalized stereotypes about gender ensconced in United States policy, media, and other arenas narrowly "describe women as more communal and men as more agentic and instrumental" (513), with men "viewed as more status worthy and competent overall," and women considered "nicer" (513; Correll and Ridgeway 2006). Based on these hegemonic beliefs, professional service work has been shown to involve *specific* masculinities. For example, Wright (1996) found that enacting masculinity

characteristics in engineering culture entailed "aggressive displays of technical self-confidence and hands-on ability" (86), while in a study of women working as sole proprietor consultants in the public sector, Marsh (2008) found that consultants enacting masculinity focused on prescriptive advice-giving, while those enacting femininity focused more on process expertise (See also Kerfoot and Knights 1993; Alvesson 1998). In both hegemonic masculinity and masculinities specific to professional service work, distinctions in how actors enact masculinity versus femininity align with the hierarchy described in the previous section between depersonalized, authoritative expertise and expertise based on experience and relationships, suggesting that gender stereotypes and those based on expertise may overlap in professional service work.

Given universal societal awareness of hegemonic gender stereotypes, Ridgeway and Correll (2004) argued that "these hegemonic beliefs act as the implicit rules of the gender game in public contexts" (513), influencing how people interact and conduct themselves. In the consulting field, Ambruster (2006) argued that the preferences of executive clients who were mostly men for consultants who were men leads to the corresponding gender imbalance in corporate consulting. Rivera (2012; 2015) showed that such demographic patterns are perpetuated through elite professional service firms' hiring processes, in which firm members, predominantly white and men, equate "cultural fit" with similarity, championing candidates like themselves and penalizing women and minority candidates, thereby reinforcing intra-firm demographic homogeneity (2015:250-251). In this chapter, I trace the relationship between gender, expertise, and status hierarchies in consulting to nonprofits, drawing contrasts to corporate consulting and describing how these hierarchies become salient and consequential in consultants' work with nonprofits.

Theoretical Tools: Brokerage and Cross-Field Effects

To analyze how these multifaceted hierarchies in the consulting field affected consultants' nonprofit clients, I leverage theory on brokerage and cross-field effects. Brokers, according to Stovel and Shaw (2012), connect insulated but proximate groups to facilitate relations and resource access, a process that relies on interparty trust and often yields advantages for brokers, due to connected parties' dependence on them. Burt (2004) showed that brokers can also promote innovation by transferring ideas between disconnected groups. Faust (2012) suggested that such brokerage dynamics contribute to the formation of elite groups made up of intermediaries "whose power rests on being able to forge connections and to bridge gaps" (Citing Savage and Williams 2008). Similarly, Prince (2014) pointed out that consultants' brokerage function gives both consultants and their clients claims to particular resources.[137] Consultants to nonprofits are not usually brokers in the Burt (2004) sense, given that funders and nonprofits often have alternate ways to reach each other, and when a funder hires consultants for its grantees, the funder and grantees are connected prior to consultants' arrival. However, consultants do serve as conduits between nonprofits and new funders, and the similarity of consultants' role to that of brokers make brokerage a productive lens to analyze how the structure of funder-consultant-client relationships influences nonprofits.

Theories of cross-field effects are also salient in understanding how the structure of the consulting field affects nonprofits. Mora (2014) defined cross-field effects as occurring when a change in a particular field sparks concurrent changes in a distinct field. Drawing on Bourdieusian field theory, education policy scholars Lingard and Rawolle (2004) outlined six

[137] Relatedly, O'Mahoney and Betchky (2008) articulated a theory of boundary organizations, which facilitate collaboration between disparate groups by reinforcing convergent interests while preserving groups' autonomy.

types of cross-field effects. Most relevant to my case are structural effects, in which the structure of one field affects the structure of another, and hierarchical effects, in which one field is hierarchically dependent on another. I use theories of cross-field effects to explain how the structure of relationships in the consulting field is consequential for the nonprofit sector.

Funders as Third Actor in Consultant-Client Relationships

As noted earlier, one of the major differentiators between consultants to nonprofits and corporate management consulting was the involvement of funders--philanthropic and corporate foundations and high-net-worth individuals--in the nonprofit consulting process. As I will show in this section, beyond providing clients with new programmatic and managerial approaches, consultants facilitated resource access for their clients by framing strategic plans as fundraising tools, integrating funder opinions into clients' plans, and using consultants' networks to connect clients with funders. However, this work was characterized by a hierarchical power imbalance--both consultants *and* client nonprofits depended on funders for resources, and funders did not reciprocally depend on consultants. In practice, the hierarchical relationship between funders, consultants and nonprofits led consultants to serve as *conduits* of funders' ideas into nonprofits' work, perpetuating funders' dominance in the nonprofit sector.

Brokerage in the Nonprofit-Consultant-Funder Triad

Consultants were often hired by foundations to work with grantees, or via grants to nonprofits specifically to hire consultants. This arrangement aligned with the overall structure of the nonprofit sector, in which the person paying for nonprofits' services was usually not the same person consuming those services. A senior consultant in a medium-sized firm explained the

former case to me in an interview, explaining that funders hired her firm directly to work with troubled grantees or those that showed promise: "they will make investments [in consulting], either to protect their prior investments, or future [investments]." She explained that in other cases, funders provided nonprofits with a semblance of the ability to choose their own consultants: "The funder will bring us in and say, 'This is what we would like the organization to do. We are asking them to get 3 proposals. We will make a grant to them, to fund this work' […] I can't remember a time that a funder brought us to the table, and then we didn't get the work." In cases like this, another consultant explained, while funders did not typically *force* a grantee to hire a particular firm, they had "their 'approved' lists" made up of the "consultants du jour" that the funder preferred. Funders were also sometimes less involved in nonprofits' decisions to retain consultants--sometimes nonprofits independently hired consultants using operating funds, and nonprofits also sometimes hired consultants using grant funding but without funder input about preferred consultancies.

In these funder-consultant-client relationships, brokerage occurred in a variety of directions. Funders brokered relationships between consultants and grantees, opening up new resource streams for both parties (Stovel and Shaw 2012), but consultants also facilitated relationships between nonprofits and funders. As an InsightSolutions consultant explained, "the money to work with InsightSolutions comes from foundations, so we have pretty strong ties to certain program officers. For example, for one client we went back to the same program officer for a larger grant [after the initial planning engagement was over]." At FocusImpact, during a project for a community foundation, consultants produced plans for the foundation's grantees and then wrote grant proposals for grantees back to the same foundation--their client--"to fund the plan we built with them." While, as mentioned in a previous chapter, consultants did not

accept engagements in which their *job consisted of* connecting nonprofits to donors, consultants *did* use their ties to funders to facilitate relationships between funders and nonprofits, to finance getting hired and reinforce relationships.[138] In this way, consultants facilitated resource access for nonprofits able to access consulting (Krehmeyer and Freeman 2012).

However, these relationships were fragile and characterized by uneven power. Ines described the shifting sands of consultant-funder links in Philadelphia, telling me that over time, the funders in the city that used to provide grants for strategic planning stopped doing so, despite continuing to require strategic plans as grant eligibility criteria. While funders used to refer nonprofits to InsightSolutions, this practice had been correspondingly discontinued, influencing both InsightSolutions' revenue and nonprofits' ability to access consulting support. Despite consultants' ability to facilitate relationships between funders and clients for both groups' mutual benefit, the status of funders as the most powerful agent in the triad affected outcomes for both clients and consulting firms. Unlike traditional brokers in which both groups whose boundary the broker spanned depended on the broker (Stovel and Shaw 2012), in nonprofit-consultant-funder relationships, only one party--the nonprofit--depended on consultants for resource access, and because consultants generally did not monopolize access to funders, this dependence was incomplete. Additionally, the power of consultants in connecting nonprofits to funders was limited by consultants' own dependence on funders for resources. As such, the triadic relationship between funders, consultants, and clients was better conceptualized as a hierarchy, with funders positioned at the top.

[138] Jim characterized this rather tenuous difference as, "hire us and I'll introduce you to rich people," versus, "I've come to know a lot of very wealthy and foundation people, and I call them and say, 'hey, I think you'd be interested in this.'" InsightSolutions, he told me, did *not* do the former, but regularly did the latter, which to him focused more on reinforcing quality relationships than selling contacts.

A former WorldAdvisors consultant spoke about the potential consequences of the hierarchical relationship between funders, consultants, and clients. This consultant felt that funders paying for nonprofits' planning processes "could cause the grantee to feel coerced," telling me about a case that led, in part, to her decision to leave the firm:

> I was working for an advocacy group for a vulnerable population. They were a tiny organization with a $2 million budget, and a $300,000 shortfall. We were brought on to do a sustainability plan for them. Our fees were $300,000--so an obvious way to make them more sustainable was fire the consultants. Doing any kind of financial planning was really challenging because ultimately their fate depended on legal rulings. […] We ended up working with them, we weren't in a great position to have impact--we didn't know much about that [field]. […] So our judgments weren't that great. And ultimately our product wasn't that useful to them, it would have been more useful to have our fees. It wasn't like the [WorldAdvisors] partner thought we could have a ton of impact, they thought it was a great way to get in with the foundation, even if we weren't the best fit. So the nonprofit [was] strong-armed. […] if you're a nonprofit CEO, you're never going to say no to a program officer. If they say, "we want you to do a WorldAdvisors plan," and you know it's to line up funding for something, you say sure.

As this consultant recounted, funders' preferences for particular consulting firms and consultants' dependence on funders for resources could create conflicts of interest. In this case, the funder-brokered relationship between client and consultant fell short of serving the client's interest, instead privileging the funder's preference first, and the consulting firm's interest second. The structure of dependencies in the consulting field, and funders' position as the most powerful entities in the funder-consultant-nonprofit triad skewed the brokered relationship, resulting in a counterproductive experience for the nonprofit.[139]

Recall that funders only sometimes mandated the consultants with which grantees worked; nonprofits also at times hired consultants directly and without funder influence. Additionally, as the last chapter showed, consultants often prioritized clients' interests above

[139] Funders' power over consultants and nonprofits was reflected in my fieldwork experience. At FocusImpact, I was welcomed into the firm's nonprofit-serving practice but denied access to their philanthropic practice--a member of the latter explained, "we could never ask a client about an outsider sitting in [on a meeting]."

their own firms' bottom lines, which consultants felt was part of genuinely supporting their clients. Regardless, in the triadic relationship between funder, consultant, and client, power hierarchies and overlapping dependencies meant that while consultants facilitated resource access for nonprofits by using their ties to funders to help get nonprofits grants to hire consultants, consultants also at times deprioritized clients' needs to advance their own relationships with funders.

Funders as Evaluators of Consultants' Work

Funders' power as the financiers or audiences of consultants' work in the nonprofit sector meaningfully influenced consultants' process and results. As one consultant explained, when a funder financed her work with a nonprofit, "the contract is with the [nonprofit] client specifically. But we understand that there is also a grant requirement with deliverables or that the report might be submitted to the funder." While consultants were careful to clarify that the nonprofit, rather than the funder, was their client,[140] consultants' awareness that the engagement's results would be presented to the funder remained salient throughout the process. Ines described how this awareness might affect an InsightSolutions planning process, suggesting that when a foundation directly funded a grantee's strategic plan, the funder paid more attention to the plan deliverable than if the grantee had simply uploaded their strategic plan as part of the grant application. Because of this, she explained, InsightSolutions tried to understand what strategic planning methodologies and document formats aligned with funders' preferences. "There's a bunch of things that we might do under this label of strategic planning. Does a

[140] This definition, however, was not always so clear. As Gina from Analytico wondered aloud during an interview, when a funder hired her firm directly to work with a grantee, "then it's a complicated relationship, because who is your client?"

program by program ROI analysis[141] […] pass muster? […how can we figure out], okay, that counts?" Ines suggested that funder preference might affect the elements consultants included in a strategic plan, both in terms of the process components and shape of resultant deliverables.

Paul, a senior sole proprietor consultant, explained what he saw as the problem with this funder involvement, focusing on the case of evaluation consultants. "Evaluators rarely get funding from an unbiased source. Their work is often paid by a foundation, and boards want to report that the foundation is spending money wisely. Boards don't embrace [inconclusive] findings. […] Foundations exercise an indisputable bias on evaluations because they look at the work through rose-colored glasses." As Paul suggested, consultants were aware that funders did not appreciate null results, which could result in decisions by consultants to bias findings to comport with funders' views of reality.[142] Funders' differential power in funder-consultant-client relationships, then, could cause the locus of attention in the triad to shift to the funder, whose power loomed large over consultants' work and nonprofit client outcomes.

Fundability as Feasibility

Beyond the specter of funders as audiences and evaluators of consultants' work, consultants also strategically included funders' preferences in clients' planning processes. Specifically, funder interests were used to limit the universe of potential options for clients to those that were attractive to (and fundable by) the nonprofit's current or potential funders.

[141] Return on Investment analysis.

[142] I did not observe this dynamic directly, and significant variation surely existed among evaluators and other consultants in whether and the degree to which they adjusted findings to comport with funders' predilections. Given this, Paul's comment should be taken as suggestive rather than conclusive. My purpose in including Paul's quote is to provide further evidence of how funder power entered into consultants' thinking about their work and potentially affected consultants' behavior.

In generating options for client nonprofits' futures, consultants pre-emptively took "fundability" into consideration. Ines put it clearly. "Before I put pen to paper on a recommendation, I say, 'Who's going to fund that?' So in a very basic way, can it be paid for? Who's the customer?" In crafting nonprofits' strategies, InsightSolutions treated funders as "customers," tailoring ideas to funder interests. In an interview, another InsightSolutions consultant explained her rationale for this behavior, drawing a parallel between grant applications and strategic plans.

> At the end of the day, what everyone needs is money. You would be foolish to undertake something that you weren't sure you could pay for and hadn't confirmed that someone was interested. […] Every grant [application] is sort of a mini strategic plan. You go through the same set of questions in an intensely shrunk down way.

In this consultant's articulation, money was the ultimate enabler of nonprofit work, and thus tailoring nonprofits' plans to funders' interests was obvious--without an interested funder, a nonprofit plan was "foolish."

Examples from InsightSolutions illustrate how consultants incorporated funder preferences into conversations with clients. In a meeting with their health and social service client, a board member asked Jim which InsightSolutions-generated options funders might prefer. He answered without missing a beat. "Institutional funders would be interested in [options] 3, 2, 1 in order." He explained his assessment. "The idea of an organization rethinking, here is our mission what's a different way to do that? Funders are very interested in that. […] Foundations believe there are too many nonprofits, they want to see mergers." In another case, Margaux was concerned that a client's program model was confusing: "I worry about contradictory statements--targeting underserved youth, but also targeting economic diversity. It will be hard for funders [to understand]--it felt clean and straightforward [before]." Margaux'

concern about what she perceived as contradictory foci was directed at a fear of alienating funders, rather than the organization itself.

FocusImpact consultants similarly focused client plans on ideas they felt were "fundable." As one consultant explained, strategic planning clients were perennially concerned about where they would find money to support their strategic goals. In response, FocusImpact made a point to "get [clients] to a goal that's powerful, that their funders we know would be excited about." Navigating clients' fears about plan elements for which they could not pay, FocusImpact consultants guided clients to solutions that the consultants perceived to be fundable based on their knowledge of relevant funders. Firms like FocusImpact that worked for both nonprofits and foundations had a particular advantage in this regard. As a consultant from a major generalist firm described, "when you work with nonprofits and foundations together you have a better sense of what makes for good philanthropy from the nonprofit side and good nonprofits from the foundation side." Consultants' insider knowledge about funder interests influenced how they designed client solutions, to better align with these interests.[143]

It is important to note that tailoring programs to funder preference was a time-honored tradition in the nonprofit sector practiced by nonprofits themselves as well as consultants. That said, in some cases an inclination to design client solutions around funder preferences led consultants to consider options very distinct from clients' original ideas. In the case of a particular client, Margaux and Ines discussed the results of a meeting with a city official, who was interested in the client organization providing services that differed sharply from its historical focus. The official "said it would be great if there was an academy where […] directors could learn [best practices]. What about that? It's fundable." Margaux was skeptical. "I don't

[143] As mentioned earlier, other consultants, however, saw this as a conflict of interest.

know how much appetite [the client representative] has for [being a] middleman. I don't think they would be into that idea. [But] they need to see that working with the city entails compromise." Ines agreed. "[These] are fundamental questions--do what you want and sacrifice scale, or compromise with the city?" Ines suggested that the client needed city funding to achieve the growth he desired, but that this funding would entail compromise to align with city interests. Though InsightSolutions did not, in the end, propose this solution to the client, the option's "fundability"--its correspondence with funder preferences--engendered its consideration. In the course of strategic planning with nonprofits, then, consultants conflated fundability with feasibility. While consultants ruled out funder-driven ideas that strongly departed from clients' interests, they heavily weighted perceived fundability in evaluating options, tailoring clients' plans to ideas they felt would be exciting to funders.

Using Funder Preferences

In addition to designing options to comport with funder interests, consultants also *prompted* and *used* funder interest in particular options--and the alignment of options with existing funding streams--to promote these options' attractiveness to clients. For example, when her health and social services client was deliberating between options, Ines pointed out funder preferences: "Some of your funders are most excited about this option. One who has historically given again and again said they are looking for the next big thing [from you]." She continued. "There is great funder interest in this. […That's] not the only reason to do something but still. […] And Evan, we usually don't name names, this is what he wants you to do." Ines highlighted funder support for a particular option to promote it to her client, even going so far as to name the particular funder who favored the option.

As Chapter 4 described, in order to generate funder preferences to inform client work, consultants included discussions with funders in the stakeholder interview component of strategic planning processes. Ines explained these funder conversations during a meeting. She told me that there were some conversations that were "helpful to have at the beginning so you can leverage them later--see what ideas [funders] have so that if we use them, we can say 'thanks for the great idea, here's how to stay involved.' And then there are those you have at the end, to test options." Funder involvement was used, at InsightSolutions, to generate ideas that could be used later to encourage funder support, and to build the case for particular options as optimal for client nonprofits.

For example, in the case of an InsightSolutions' client, Sara gave me specific instructions to, in a call with a funder, "ask about all four options even though [the client] prefers [one option in particular]." She explained that she wanted to know whether funders' preferences aligned with the option the client preferred, or whether funders "had a strong appetite" for a *different* option. In a subsequent conversation, Sara described how we would use funder reactions to question the client's preference. "Both funders thought that franchising and [another option] were long-term dreams. So the options are multiply at home or multiply at [a partner site]." Indeed, in this case InsightSolutions used funder interests to challenge the client's preferences. This became evident during a strategy session between Ines and Sara. Ines griped to Sara, door closed in her office. "We should talk to funders before fleshing out the options. [The client] thinks we will [develop full plans for] all of the options, and we will need that ammo--we can provide a rationale for not looking at franchising." She continued, saying that InsightSolutions' recommendations would flow directly from funders' interests as uncovered through interviews: "we think you should focus on options 2 and 4 because funder input is this." Ines proposed using funder preferences

generated through stakeholder interviews to cut a client's set of options in half, overriding the client's desire to pursue all available options (which the consultants felt was not feasible).

While consultants used funder preferences to advocate for particular options to clients, consultants also occasionally challenged funders' opinions. For example, at ArtsNow, Isabel rejected a funder's desire to avoid public funding for a new cultural center, claiming that the project would not be possible without public support. In a meeting with the funder and client representative, Isabel conceded to including the funder's vision for the organization in her report, but not his funding expectation. "We are amenable to an outcome report with two scenarios, but in both cases [the project] would need to be subsidized by the city." Later, however, Isabel wondered if she gave the funder "too much tough love." Though she stood by her assertion that subsidy would be necessary, she worried that she had pushed the funder too far out of his comfort zone and preferences for the project.

As they did their best to facilitate resource access for clients, then, consultants' methods to include funder voice in client work reinforced the power of funder priorities to shape nonprofits' work. Consultants did so by limiting nonprofits' options to those that aligned with funding sources of which consultants were aware, or funder preferences that consultants uncovered in their research. In the process consultants redefined feasibility in nonprofit strategic planning to mean fundability by existing or prospective funders. While consultants did not always transfer funder preferences to client nonprofits, rejecting funder-driven ideas that too strongly contrasted with client preferences and historical models, and those that consultants thought were impossible, consultants treated alignment with funder interests as a key determinant of a particular option's feasibility.

These findings show that consultants were not brokers in the traditional sense--instead of promoting innovation by translating ideas between disconnected actors (Burt 2004), the uneven power and dependency relationships between funders, consultants, and nonprofits led consultants to serve as *conduits* of the interests of the more powerful party (funders) to the less-powerful party (nonprofits).[144] Idea transfer happened primarily in one direction, as consultants shaped nonprofit work to correspond with funder interests and facilitate resource access for consultants and their clients.

Strategic Plans as Fundraising Tools

The inclusion of funder preferences into nonprofit strategic plans was made material via consultants' belief in plans' dual purpose--to both guide organizational decisions and serve as fundraising tools. Recall the previously mentioned claim of homology between strategic plans and grant applications. As Jim explained, the relationship between planning and fundraising was explicit, not analogical. "The dirty little secret is doing strategic planning and raising dough are the reverse sides of the same coin." Jim framed fundraising and strategic planning as inextricably linked, a notion that Ines developed in an interview: "whether you go through a formal strategic planning process or not, you need a clear direction in order to get funding. Likewise, you need funding to implement a strategic plan. They're impossible to unlink from one another." Ines suggested that a strategic plan's output, a clearly articulated direction, was necessary for nonprofits to attract funding, and that funding was correspondingly necessary to implement

[144] This finding recalls Korff, Oberg, and Powell's (2017) concept of "interstitial communities," groups of organizations (including, in their analysis, prominent nonprofit consulting firms) that connect disparate domains and serve to "assemble ideas and concepts into novel re-combinations," which they share with the groups they connect without benefitting individually from their boundary-spanning positions (See also Powell et al. 2016).

strategic plans. In this way Ines re-articulated funders' power over nonprofits, refracted through the lens of consultant deliverables.

FocusImpact shared this view, and articulated it even more sharply. As Marion put it, her approach to strategic planning was specifically geared toward helping her clients fundraise. "[If] you ask a nonprofit what it needs most, it's going to say money. […But] if you have a common understanding of your mission and impact goals, you can raise money to support plan implementation […], completely shifting the way an organization is able to finance growth." Marion framed mission and goal clarity as supportive of fundraising success for nonprofits, rather than the other way around in which fundraising exists to support organizations' strategic directions. Another FocusImpact consultant echoed this framing.

> Any time we try to [help a client] make decisions, they're like, "How are we gonna pay for it?" That's not strategic. I get that it's an important question, and I've been on that side, and it's terrifying. But, when you have a strong, powerful vision and mission and a clear sense of where you're going, it's that much easier to raise the money, because funders are either excited about [your plan] or not, but they're not unclear about it. So we make people hold off on the fundraising anxiety. […] We build out a tool to go to funders and say, "This is what we need." And some of our clients have immediately gone to funders and actually raised significant money in the first year.

Marion and her staff equated clarity of mission and goals with fundraising success, framing strategic plans as potent tools to win over funders. "Fundraising anxiety," according to this FocusImpact staffer, "was not strategic" because it was not integrated into the organization's mission and goals--rather, the clear direction clients articulated in FocusImpact-created strategic plans were key to funders' wallets. Other FocusImpact staff members correspondingly touted clients' success in post-plan fundraising as justifying FocusImpact's fees--as one put it, "if our strategic plan will help them raise $5M, that's a really good investment for them to spend $200K." "Strategy" here was equated with means-end rational clarity and focus, with strategic

plans framed as key to securing resources from powerful actors.[145] This framing was also present at ArtsNow, where staff sometimes referred to plans as "marketing tools."

Another FocusImpact staffer clarified the difference between the firm's approach and actual fundraising work: "When people ask us if we do fundraising we say no, we don't help you build a capital campaign or figure out who you're going to cultivate." Rather, fundraising success was an indirect product of FocusImpact's work. As Marion put it, "if you don't know what you're asking for money for, you're never going to be successful [fundraising]. So we help clients clarify their message really powerfully, and in the cases that are really successful they are able to turn that […] into money." As yet another FocusImpact consultant admitted, "if you can really focus and be strategic about your work, fundraising will kind of come. I maybe blindly believe in that." When strategic plans were successful, this consultant suggested, they became a type of currency that could be converted into capital. Framing strategic plans as currency further reinforced consultants' conduit role between nonprofits and funders, highlighting the differential support in resource access provided to nonprofits that were able to access consulting services.

Consultants as Funding Conduits

In addition to framing the outputs of their work as fundraising tools, consultants also themselves connected clients with financial resources. In the case of InsightSolutions, the firm used strong networks in the local funding community and a history of working with area philanthropists and foundations in order to advocate for its clients to funders. During a phone call with her sports youth development client, Ines proposed next steps for the engagement: "we will

[145] This aligns with some funders' requirements that prospective grantees had strategic plans, and the popularity of certain large consulting firms due to perceived legitimacy to funders. And consultants' ideas about strategic plans as fundraising tools may have credence--in a study of formal planning by nonprofits, Hwang and Bromley (2015) found preliminary evidence that having a strategic plan *may indeed* support nonprofit fundraising success.

talk to our colleagues and see if we have a connection on the Dunnigan Foundation board. If so, we will talk to them to do two things. One, get the perspective of an outside funder, and two, tell them really good things about the program." Using the firm's connections with local foundations, InsightSolutions consultants actively promoted their clients to funders. In this way consultants crossed from building their clients' legitimacy through association (i.e. clients were perceived as more legitimate due to association with consulting firms, and vice versa) to actively building clients' resource streams.

In a subsequent discussion about the same client, Ines and Margaux discussed materials they planned to use during stakeholder interviews with funders. They spoke about each conversation in turn, deciding on customized information to bring to each person. Margaux pantomimed a conversation. "What do you need to hear to tell you it's fundable? Evidence? What's exciting? The questions it raises?" The two women discussed and decided on the order of the calls, such that successful previous calls could be used as leverage for further conversations. In moments like these, the line articulated in the last section between fundraising and planning blurred, as consultants promoted their clients to funders and identified funding contingencies.[146] In the context of funders' outsized influence on consultants and nonprofits, consultants served as tangible conduits to resources for nonprofits who were able to access consulting services.

Beyond using their networks to advocate for clients to funders, consultants attempted to influence funders' work more broadly, aspiring to make additional resources available to the nonprofit sector. However, funders' power in relationships with consultants and nonprofits made this task difficult. One afternoon at InsightSolutions, Jim and Margaux walked several blocks to a meeting of a regional funder association to present the results of a project on higher education.

[146] This may also stem from the different service mixes of the two consulting firms--InsightSolutions offered fundraising services to nonprofits, while FocusImpact did not.

The room was filled with the who's who of the region's philanthropic sector, and Jim was comfortable--he clearly knew most of the people, who greeted him warmly. After his presentation, discussion ensued. Jim interjected midway, casting his eyes around the room. "As you hear this, to what extent do you think philanthropy could or should play a role in promoting [higher education]?" Utter silence descended. Finally, a representative of a major foundation sighed. "Jim, I take issue with that framing." Jim contested this, continuing, "what we observed is that no one owns the issue. There are different entities doing different stuff, but no one owns it. Should philanthropy play a role in catalyzing [work on this topic]?" There was no answer, until another funder suggested that universities should "own" the issue.

After the meeting ended, Jim was visibly frustrated. He said that he was surprised and disappointed by funders' unwillingness to lead. Later, walking back, Margaux told me that "this is Jim's personal crusade, to get funders to step up." As a known entity in the philanthropic landscape, Jim attempted to push regional funders to take responsibility for supporting nonprofit activity. However, his attempt fell flat--funders' disproportionate power over nonprofits and consultants allowed avoidance to carry the day, despite Jim's direct questioning. In an interview, a FocusImpact consultant wondered aloud about this role for consultants--"how do we influence philanthropy, because that's a major source of funding for nonprofits?" She suggested that consultants should better recognize their unique role and influence vis a vis funders and nonprofits, and "capitalize" on it to benefit nonprofits.

Consultants, recognizing their conduit role between the philanthropic and nonprofit sectors, attempted facilitate resource access for clients. Consultants could do this effectively in the case of one-to-one network connections in which they directly advocated for a client to a funder they knew. Given funders' disproportionate power in relationship to consultants and

nonprofits, however, consultants' leverage was limited when attempting to influence the broader philanthropic landscape and funders' overall priorities. Notably, large, high-status consulting firms and prominent consultants who worked primarily with foundations had more influence in this regard. While this dissertation does not focus on the latter group of consultants, I discuss the former in the next section. In this context, smaller consulting firms like InsightSolutions that worked primarily with nonprofit organizations experienced more difficulty influencing funders' overall priorities, if they were able to influence funders at all.

Summary

In sum, in addition to providing clients with new programmatic and managerial strategies, consultants served as conduits of ideas and resources between funders and nonprofits. They did so by framing strategic plans as fundraising tools, incorporating funder preferences into planning processes, and using firm networks to connect clients to resources. In this arrangement, nonprofits that were able to access consulting support experienced an advantage in obtaining necessary financial resources. However, within this conduit relationship, the power hierarchy between consultants, their nonprofit clients, and funders had an indelible impact on consultants' work. Both consultants and nonprofits depended on funders for resources, nonprofits only somewhat depended on consultants given that many had ongoing funder relationships, and funders did not depend on consultants for resources at all. This unequal power led consultants, doing their best to facilitate resource access for clients, to tailor nonprofit plans to funder preferences--consultants, as conduits, translated ideas primarily in one direction, from funders to nonprofits. This reinforced consultants' role as agents of variation in nonprofit work, as funders' divergent preferences introduced additional variation into consultants' recommendations, while

concurrently reinforcing existing hierarchies in the nonprofit sector. This finding aligns with key tenets of resource dependency theory regarding how organizational interdependencies constrain action (Hillman et al. 2009), as well as O'Mahoney and Sturdy's (2016) arguments that resource-based power can be used to impose ideas on others, and Powell et al.'s (2016) findings about how foundations influence organizational practice (See also Hwang and Bromley 2015). While consultants wielded power to connect their clients to resources, they struggled to overcome the larger funder-driven power dynamic--indeed, consultants were just as ensnared in it as were their clients. As a result, consultants perpetuated--and indeed, often promoted--philanthropy's influence on nonprofits' plans, and the overall hierarchical dominance of funders in the nonprofit sector.

Hidden Hierarchies in Consultant Expertise

In addition to hierarchical relationships between consultants, clients, and funders, the field of consulting to nonprofits was itself hierarchically organized. As I described in an earlier chapter, there existed important differences in approach between consulting firms of different size and content focus. However, because consultant expertise was ill-defined, consultants' expertise often mismatched clients' expectations. In this context, consultants critiqued each other's work, and clients complained about consultants they felt to be inadequate. By analyzing these critiques and accounts of unsuccessful client engagements, I will argue that the hierarchy between firms in the consulting field contained dimensions related to status, expertise, and gender. In this hierarchy, consultants and clients often considered the customized and discussion-driven work of the boutique firms on which this dissertation has focused inferior to large firms' direct recommendations and consistent methods, despite arguments by the former that the latter

were inappropriately standardized and reductive, and attempts by small firms to distance their work from consultants they felt over-relied on clients' opinions. I will argue that the consulting field's hierarchical structure reproduced similar hierarchies in the nonprofit sector via a division of labor between large and small firms.

Client-Consultant Matching in an Ill-Defined Field

As noted previously, management consulting lacks common markers of established professions, including a standard body of knowledge and credentialing system used to define consulting expertise and evaluate quality (Abbott 1988). Indeed, consulting expertise in the nonprofit sector was very difficult to articulate, and differences in consultant approach and style were at times difficult for clients and observers to detect. Such distinctions were hidden behind generic descriptions of services like strategic planning, and the mission-oriented language consulting firms used to position themselves and their work.

However, as I described in Chapter 2, despite the difficult-to-explain nature of consultant expertise, important differences in approach did exist among providers in the field. To reprise my earlier argument, some firms used a more "hypothesis-driven" approach, in which consulting teams generated hypotheses about solutions to client problems and then proceeded to test those hypotheses through research and quantitative modeling, while other firms took more "process-oriented" approaches, in which consultants focused on inductively generating solutions to problems by facilitating discussions between groups of client representatives. Hypothesis-driven and process-oriented consultants differed both in their preferred methods for strategic planning (hypothesis-oriented consultants were deductive and consistent while process-driven consultants were open-ended and flexible) and the type of information relevant to their work (external data

versus the experiences and perspectives of client representatives). The hypothesis-driven versus process-oriented distinction among consulting firms mapped roughly onto firm size, with larger firms engaging in more hypothesis-driven work and smaller firms focusing more on process and facilitation.[147]

Consultants of all types aimed to work with clients who shared their preferred style. As an independent evaluation consultant explained in an interview, clients' preferences varied along with consultants' approaches. As he put it, just as some consultants said, "I know best, here's what you need; boom, boom, boom, boom […while others said] let's co-create something, let's figure something out," Some clients said, "just give me the answer," while others felt, "we want to explore, we want to understand." In working together, both consultant and client hoped for a match--hypothesis-driven consultants with strong perspectives regarding the information and methods they needed to solve client problems hoped for clients interested in direct recommendations, while process-oriented consultants who practiced a more inductive, participatory approach hoped for clients who wanted to be involved in generating recommendations.

However, the fact that differences in consultant approach were difficult to detect at the outset of engagements presented problems for both clients *and* consultants. Client nonprofits ran the risk of disappointment when their chosen consultant's approach did not match their expectations, and consultants became frustrated by what they perceived as unrealistic

[147] There were also many firms with approaches between these two extremes. The majority of this dissertation has focused on small and medium-sized consulting firms like InsightSolutions and FocusImpact, that were situated between these two poles. Additionally, as I have described, subfield specialists like ArtsNow differed in important ways from small generalist firms. Finally, while larger nonprofit specialist firms like WorldAdvisors used a hypothesis-driven approach, they also used significant facilitation in their work.

expectations from clients.[148] As an example, Ben, a former employee of a large nonprofit specialist firm, gave an account of a mismatch in expectations with a major foundation. "[It was] one of our least successful projects--even though we worked really hard on it, we were trying to present more emergent ways of thinking, and they didn't know what to do with it. So we ended that project and they hired a corporate management consulting firm." He explained that the corporate firm provided the client with a clearer, more directive recommendation.

Status Hierarchies in Consulting

While Ben explained his former client's decision to hire a corporate firm in terms of the client's preference for a different approach, for some nonprofits the inclination to hire large, prominent firms also related to status, visibility, and perceived legitimacy. Janine, a sole proprietor consultant who had worked with many foundations *after* they hired major consulting brands, explained her perception and critique. "Boards want these [consulting] houses because they are affiliated with for-profit consultants and the board is made up of corporate people, or the CEO doesn't know what to do and jumps to WorldAdvisors because it is a known name." Janine claimed that corporate nonprofit boards preferred corporate consulting firms with which board members were familiar, and that nonprofit executives similarly associated the visibility of major nonprofit specialist firms like WorldAdvisors with quality (e.g. Strang, David, and Akhlaghpour 2014).

Indeed, corporate consulting firms and large nonprofit-specialist firms like WorldAdvisors were nonprofit workers' default associations when discussing consulting. When I talked to colleagues working in nonprofit organizations about my research, they frequently

[148] Nonprofit and philanthropy professionals have written about this issue in the professional literature (e.g. Kibbe 2015).

mentioned these firms as defining their perceptions of consulting across sectors. Mirroring and intersecting with the dynamics of the corporate consulting field, large firms, with their prominent brands, high fees, and prolific publishing departments, occupied the top of a status hierarchy of consulting firms (Ambruster 2006).

In this context, consultants working in smaller, lower-status firms often complained that they were subjected to client expectations based on large firms' hypothesis-driven methods, even though small firms tended to use more process-oriented approaches. Jim exemplified this perspective in a meeting with Margaux and me, in which we debriefed Jim about a client who had fired InsightSolutions. Midway through the meeting, Jim turned to look at me and sighed. "People hire us to be very smart and figure it all out, and then ask, 'how are you not as smart as you said you are?!'" He continued, explaining that clients expected InsightSolutions to independently produce optimal solutions. He gestured, pantomiming a dog searching for a bone. "Go find the bone! Go out, be clever!" He explained that he tried to illustrate for clients what the arc of their emotions would be--he drew a squiggle in the air--"we are the spark, the midwife, whatever, and they are like yeah, yeah, yeah we know." The issue, he argued, was that clients expected InsightSolutions to find the "perfect solution," but this did not match up with InsightSolutions' collaborative process, where "$20K later, you still don't know [exactly what the solution is]." While clients wanted InsightSolutions to deliver codified solutions that resembled what prominent corporate firms produced, InsightSolutions staff members said this was not what InsightSolutions did--they instead saw themselves as experts in, as Jim put it, midwifery--they helped guide clients in a structured process of discovery, managing clients' emotions along the way.

Jim clarified that the degree to which clients felt that InsightSolutions' work diverged from their expectations was a question of perception as much as process. As he explained to Margaux and me, "sophisticated" clients expected InsightSolutions to come up with novel solutions, while "in the land of the blind leading the blind, we can be that [the genius with the great idea]." For "less savvy" clients, as Jim put it, InsightSolutions' ideas were perceived as more novel, while for "savvier" clients, InsightSolutions struggled to defend the value of its expertise in the face of clients' expectations for recommendations like those corporate firms produced. While Jim did not define "savviness" in our conversation, when tasked with delivering a less-baked solution than clients expected, InsightSolutions' success rested on its ability to convince the client that process-oriented expertise was valuable.

Expertise Hierarchies in Consulting: Exotic Advice and Collective Wisdom

Consultants' complaints about what they felt were client misperceptions about their work conveyed frustration with the fact that high-status large firms defined the default expectations in the consulting field. However, consultants' gripes about clients and other firms also incorporated a related but distinct argument--one about the differential value of different types of expertise.[149] While large firms' high status was certainly related to the proprietary models some of them used, in consultants' critiques of one another's work, consultants from both small and large firms placed their work in a hierarchy of both status *and* expertise.

Take the cases of Ben and Jim from the last section. Jim suggested that the ability to produce novel, discrete solutions--what I call *exotic advice*--defined whether clients considered InsightSolutions "smart," while being "the midwife" and supporting clients to come up with their

[149] I mentioned the relationship between firm size and firm expertise in Chapter 2.

own solutions--what I call *collective wisdom*--was less desirable. In Ben's account of a failed client engagement, he went on to explain the ultimate difference between his firm's approach and that of the corporate firm that replaced his. "In the end a lot of the ideas we helped them come up with were in [the corporate firm's] strategy, but it was probably a lot cleaner, in a box with a bow on it." In Ben's telling, the client's preference for exotic advice mismatched his firm's more open-ended process, resulting in a failed engagement and recourse to a larger firm accustomed to delivering more direct recommendations. In these accounts, consultants argued that beyond corporate firms' higher status, the *exotic advice* these firms delivered to clients--clear, directive recommendations based on expertise considered separate from clients' knowledge--was often considered superior by clients to the *collective wisdom* on which smaller firms tended to focus, that prioritized shared knowledge and using data as an object to spark discussion. Ines echoed this perception in an interview, telling me that "recently, [on a Facebook group for nonprofits], one of our clients posted this provocative post. 'Do you find that consultants actually contribute anything, or are just there to take money from philanthropy that you could just [have instead]?' That's pervasive." The client argued that consultants, in failing to contribute exotic advice to nonprofits' work, actually hurt, rather than helped, the nonprofit sector.

Unsurprisingly, consultants from corporate firms also thought the exotic advice they delivered was superior to smaller firms' collective wisdom. Take the perspective of Gina, leader at Analytico, a corporate firm that served both nonprofits and corporations. She summarized her take in an interview. "Individual consultants are brought in to broker alignment--get everyone to hold hands and say we are comfortable with the change. […] If [the organization] needs a soft hand I refer them to [an individual consultant]. If they need a firmer, more direct thing, where we

give the organization 3 choices [for their future], and they get to pick one, then [Analytico] takes the assignment." Analytico, she argued, helped clients identify "the best way forward in a very objective, data-driven, fact-based way"--firm members focused on analyzing quantitative data to identify what they believed was the objectively correct solution for clients. "They might be answers you don't want to hear, […] but it's just the facts ma'am." Gina abstracted Analytico's process of generating recommendations from human judgment, claiming instead that Analytico reported "the facts"--the seemingly objective results of data and trend analyses. Indeed, firms like Analytico were known to use quantitative models to analyze client data. A former employee of an Analytico competitor gave an example, describing a "cost-effectiveness model" she helped build that "plotted all of [the client organization's] interventions on one page, to get a sense of where you're getting the most impact for your money."

Gina contrasted Analytico's analytics and clear solutions to the consulting firm hired by the nonprofit on the board of which she sits, that she claimed was more focused on facilitating collective wisdom than identifying an "objectively" correct solution. "At the end of the day they didn't say 'this answer is more robust.' They didn't have a point of view. […] Their goal was not to produce the best strategy for the organization. Their goal was to produce a strategy that people in the organization could get excited about and feel a sense of ownership around." Gina spoke pejoratively about firms that used data as an object instead of producing "objectively correct" solutions ("it's just the facts, ma'am"), reinforcing a hierarchy that ranked exotic advice as higher value than collective wisdom. Gina's comments also echoed O'Mahoney and Sturdy's (2016) arguments about the ways prominent consulting firms exercised power by attempting to discredit other styles of work (258).

Consultants in boutique firms also, somewhat contradictorily, reproduced the expertise hierarchy in consulting. They verbally distanced their firms from practices they felt lacked substance, even though they themselves often used similar practices. In an interview, Ines explained what she saw as the negative perception of collective wisdom: "there's a perceived value judgment about helping someone get from point A to point B, and they would have gotten there anyway if you weren't there, versus bringing a new idea into the room, which [clients] couldn't possibly have thought of themselves." Ines felt that exotic advice derived from knowledge clients did not share was valued more highly than collective wisdom generated from knowledge clients already had. As Ines put it, "we have seen a lot of strategic plans where there isn't a 'big idea,' we don't want to be associated with that." Even though InsightSolutions' strategic planning process emphasized the co-production of ideas and use of data as an object to spark discussion, Ines acknowledged wanting to distance the firm from being perceived as all-process. Another InsightSolutions member explained that the firm attempted to achieve this distancing by gathering significant external information at the beginning of its planning process: "the fact that we spend the first portion of all of our planning work doing interviews, gathering research, I think it lends legitimacy. We have to position ourselves as some level of expert, even if we're on that process side [of consulting]."

Marcie, a partner at a small firm, echoed the value placed on exotic advice in consulting. Some consultants, she claimed, were "super light on information and high on facilitation, basically the knowledge is in the room, we just have to bring it together and out." In contrast, she explained, other consultants "acknowledge we don't know everything, we have to learn a lot."[150]

[150] Note that firms that used data as an object to spark discussion, including Marcie's firm, InsightSolutions, FocusImpact, and ArtsNow, would be located *between* these two extremes.

Despite using facilitation in her work, Marcie critiqued consultants she felt did not include adequate new information in their processes:

> The reality of the sector is that there are small independent consultants that are about building on strengths and perceptions, not building on external information but instead on information that the client already has. They want to give the client what they want, […but] does the client actually know what they want? Oftentimes not. […] They are giving this work a bad name.

In Marcie's narrative, consultants who over-emphasized collective wisdom instead of exotic advice were *bad* consultants.[151] She described external information as characterized by an objective quality that made it superior to the perceptions of clients who, she thought, often did not "know what they want." When comparing themselves to competitors, then, consultants from small firms that relied heavily on facilitation and used data as an object to spark discussion contradictorily reinforced the importance of "big ideas" and "objective" external information in their work, attempting to distinguish themselves from consultants they felt relied *too heavily* on clients' perspectives. In doing so they reproduced a hierarchy in which exotic advice was valued more highly than collective wisdom.

However, these same boutique firms simultaneously critiqued corporate firms' approaches. In an interview, Arthur lamented about needing to clean up after the work of a large firm that serves both corporations and nonprofits.

> We think that subject matter expertise is essential. […] The number of times that we've followed this firm into a city, we've had to completely redo [their work] because their logic is sometimes right, their algorithms are often correct, but they have no understanding of the sector […] in the end of the day, let's be honest. What does [the corporate firm] do? Some partner gets on the board and donates some services and some really, really bright 32-year-old MBA with a couple of colleagues gets put on the assignment. They have great tools, they have great process-steps but I don't believe they can actually define success in a strategic way. And I don't believe they understand the breadth of forces and expectations that are at play in an arts and culture institution.

[151] I cannot confirm whether the clear distinctions Marcie suggested existed in practice, or whether her critiques should be interpreted as a practitioner complaining about competitors. Reality likely contained elements of both.

In his critique, Arthur argued that the corporate firm's rigid process and quantified tools, while high quality, were insufficient to capture the complexity of arts organizations' operations and context.

A sole proprietor evaluation consultant elaborated on this point, arguing that in his experience working alongside corporate firms, the consequences of over-simplifying nonprofit problems was that recommendations were not implemented. "You get a lot of big ideas ... that prove impractical at the end, […and get abandoned]." This over-simplification, he argued, was driven by impersonal but consistent methods. "The more corporate they are, the more they are expected to have very tested solutions at hand, for every problem ... crank one out, particularize it, hand it over, and be gone." This depersonalized system, he claimed, prevented firms from adequately understanding nonprofit problems. "If you don't understand the problem, but you're still cranking out the deliverables [...] with every deliverable, you're a little bit further [from reality]."[152] Consultants in small firms suggested that the standard processes that gave rise to corporate firms' exotic advice inappropriately ignored organization-specific details, suggesting that corporate firms *did* provide homogenous recommendations (Hwang and Powell 2009), while the boutique firms on which this dissertation has focused, with their customized processes, did not.

The hierarchy based on firm status, then, also overlaid beliefs about the differential value of different kinds of expertise. In this hierarchical system, both clients and consultants valued exotic advice perceived to be external, authoritative, and separate from client understanding more highly than collective wisdom associated with inductive exploration, context, and client

[152] This critique of large firms as insufficiently attentive to context resonates with arguments that large corporate consulting firms are over-reliant on global versus locally-informed ideas (Faulconbridge and Jones 2012).

perceptions (Espeland and Stevens 1998). While consultants in small firms contradictorily reproduced this hierarchy in attempting to distance themselves from competitors they felt relied too heavily on collective wisdom, these firms simultaneously critiqued corporate firms' exotic advice, rejecting what they felt was an inaccurate and insufficient reduction of the complex world of nonprofit practice to fit within standard templates (Christin 2018).

Gendering the Status-Expertise Hierarchy

When senior men in boutique consulting firms attempted to distinguish their work from that of consultants they felt over-relied on collective wisdom, the between-firm status-expertise hierarchy also sometimes took on a gendered valence. This was exemplified by Jim's explanation of how InsightSolutions' work differed from what he saw as process-oriented sole-proprietor consultants. Sitting in his office, Jim told me he called this latter type of consultant "women in scarves. […] They're very process-y. They're facilitators of discussions, they often have degrees in organizational psychology, so they're looking at the systems and approaches and not about the substance of what is happening." He continued, describing these consultants as focused on "culture and behavior" over substance, and claiming InsightSolutions' approach as distinct. "We know about the substance of our clients. […] I'm not gonna just accept what you say. I'm gonna push back at you." Jim continued, telling me that he recently paid to attend a two-day workshop for consultants because he "wanted to learn tangible facilitation strategies. But I couldn't deal and left. I was that angry guy in the room." The workshop leaders suggested, he told me, "that whoever is in the room are the right people, and whatever they come up with is the

right decision. And I don't buy it."[153] Jim distanced his practice--and that of his firm--from what he described as "women in scarves" whom he thought over-relied on collective wisdom in their consulting work.

In attempting to distinguish his work from that of "women in scarves," Jim characterized his approach as similar to corporate firms' exotic advice, a position inconsistent with his and other firm members' descriptions of InsightSolutions' work, and the firm's reliance on facilitation and use of data as an object to prompt discussion. Jim then explicitly gendered the distinction between his work and consultants who focused on collective wisdom, associating the former with "the angry man" and the latter with "women in scarves." Jim went on to suggest that certain clients needed the approach he gendered feminine, rather than InsightSolutions' approach, which he had gendered masculine.

> There have been times where the culture and behavior issues [for a client] have been so big that I said, "Look. This is beyond me." It was a women's collective that did behavioral health stuff, and they hired us. And I stopped and I got them a woman in a scarf to come and do the stuff that they had to deal with. As a women's therapy center, what do they do about transgender people? One of the board members had a transgender child. So it was all this mushy stuff. It's like whoa. I mean, it wasn't the topic, but I just couldn't. I got [a woman in a scarf] to do that.

Reflecting, he admitted, "I'm not a touchy-feely, women's collaborative person." Jim was quick to distinguish InsightSolutions' work from what he called a "touchy-feely, women's collaborative" process directed by "women in scarves," even though InsightSolutions made frequent use of facilitation in its work. Using gendered language, he defined this alternate style of consulting as almost passive, in which the consultant assumes that "whoever is in the room are the right people, and whatever they come up with is the right decision."

[153] Jim understood that consultants practicing this approach were not always women. During another part of this conversation, he told me that InsightSolutions once hired a young man with an approach like this, but he did not last long at the firm.

In his narratives, Jim described InsightSolutions' approach as enacting masculine characteristics--"I'm not just gonna accept what you say, I'm gonna push back at you," rather than feminine ones--"whoever is in the room are the right people." While "pushing back" signaled masculinity to Jim, empathetically accepting people as they were signaled femininity (Marsh 2008; Ridgeway and Correll 2004; Correll and Ridgeway 2006; Schippers 2007). He also suggested that certain problems faced by clients--in this case, a question about gender in a gendered organization--*needed* a consultant who enacted this feminine style. As a whole, in his narrative Jim re-articulated *and gendered* the hierarchy of consulting expertise that I described in the last section. Consultants who focused on collective wisdom were hierarchically subordinated both based on the lesser value of their expertise, and on the gender associated with that expertise.

Arthur from ArtsNow explained his work in similar terms. In his office, he argued:

> We are not soft consultants. I don't know how else to say it. […] There's a big difference between hiring a strategic planning facilitator that says, "I'll guide you through, imagine a beautiful sunny day," [and us]. We bring a lot of data to the table […] If you put [a major corporate firm] over here as a hard data consultant, and you put lots and lots of sole practitioners, retired, typically female people over here[154] [we are closer to the corporate consulting firm side].

Senior men who served as leaders of the firms in which I conducted fieldwork[155] mobilized masculinity (Martin 2003; Cooper 2000) by using gendered language to emphasize the opinionated and "hard" data-based nature of their consulting work, which they aligned with high-status corporate firms (Faust 2012), and distance themselves from what they perceived as

[154] It is worth noting that many women *did* work as sole proprietor consultants in the nonprofit sector.
[155] I am unable to confirm whether consultants in corporate firms similarly gendered smaller firms' work. For example, given that I was unable to conduct fieldwork in a firm like Analytico, I cannot confirm whether Gina or men at Analytico engaged in similar behavior. It may be that Jim and Arthur, as men who led firms on the process side of the consulting spectrum, were especially likely to engage in such gendering, to reinforce their masculinity within a style of work they perceived to have feminine characteristics (Simpson 2004).

"softer" facilitative and "touchy feely" work of sole proprietor consultants, which they associated with femininity (Marsh 2008; Ridgeway and Correll 2004; Simpson 2004).

Jim and Arthur's comments echo similar gendered dynamics observed by Marsh (2008) in her study of women working as sole proprietor consultants in the public sector. They also recall scholars' accounts of the attempts of men in jobs traditionally held by women to emphasize the job elements they felt had masculine characteristics, and distance themselves from the elements they perceived to have feminine characteristics (Simpson 2004). Jim emphasized "knowing about the substance" and "pushing back" on his clients, while distancing himself from organizational culture and facilitation. Similarly, Arthur called attention to the "hard data" ArtsNow used in its work, downplaying consultants' function to "guide" their clients, which he called "soft." The fact that both Jim and Arthur led small firms that primarily employed women and made frequent use of facilitation and data as an object to prompt discussion may have mobilized their enactments of masculinity and desire to distance their firms' work from consultants they felt over-relied on collective wisdom, which they associated with femininity. Despite their frequent self-reflexive comments indicating awareness of the privileges associated with their positions as high-status men (Cooper 2000), Jim and Arthur's narratives reinforced the subordination of process-oriented consulting with its focus on collective wisdom as inferior to larger firms' hypothesis-driven exotic advice, adding a gendered dimension to an already complex hierarchical system.

Reproducing Nonprofit Hierarchies: Prices and Preferences

As the last sections have shown, the field of consulting to nonprofits was organized via a multifaceted hierarchy that contained dimensions related to status, expertise, and gender. In this

section, I will describe how this hierarchy came to influence the nonprofit sector. Differences in large and small consulting firms' prices and the degree to which firms filtered out potential clients based on clients' available budgets yielded a division of labor in which large, wealthy nonprofits worked with large consulting firms while smaller nonprofits worked with small firms and sole proprietors. I argue that via this hierarchical division of labor, consultants mirrored and reproduced existing hierarchies in the nonprofit sector.[156]

Access to consulting was stratified by differences in price and the means of obtaining services from large versus small firms. Some large firms, especially those that served both nonprofits and corporations, offered *pro bono* or "low-bono" (sharply reduced, as described by a consultant from a large firm) work for nonprofit clients. However, in order to access such free or discounted services, a nonprofit had to be well-connected. Such connections often stemmed from board membership--if an executive from a corporate firm served on a nonprofit's board, that person might facilitate pro-bono services. Beyond this, only funders and large nonprofits could afford large firms' fees (upwards of $250,000 for a strategic plan).

Indeed, larger consulting firms sorted potential clients based on clients' budget. As Marion at FocusImpact explained, "I look [the potential client] up on Guidestar,[157] and see if they're a $2M organization or a $700K organization." She went on to say that the budget helped her understand whether the client would be able to afford FocusImpact's services. "I just want to be clear that we're in the same ballpark. If $50K will make you fall off your chair and you don't have other funding, I'll send you to a great independent consultant."[158] Nancy from

[156] This section focuses primarily on the contrast between large and small generalist firms. Subfield specialists like ArtsNow, given their content expertise and comparatively narrow focus, existed in a somewhat different segment of the consulting market than the division of labor I describe here.
[157] A site that collects and publicizes IRS Form 990s, which detail nonprofit financial information.
[158] Marion justified FocusImpact's prices as necessary to sustain a 50-person staff.

WorldAdvisors explained similar criteria for filtering potential clients. *"*When we don't think we're the right answer for an organization, there are a number of independent consultants […] that we refer to." She explained that these independent consultants provided "what I would describe as longer and thinner support. Facilitating a few workshops over eight months, versus a concentrated four to five-month strategy engagement." She suggested that such "longer and thinner support" was appropriate for nonprofits that she perceived did not need--or, presumably, could not afford--"the full capability of a WorldAdvisors team."[159]

In addition to sorting potential clients on the basis of their budgets and perceived need for large firms' services, some large firms also required potential clients to be financially solvent and oriented toward growth. As Diane, a senior member of a large corporate firm, explained, potential clients could not be running a deficit. She continued: "are these folks doing something that could scale up in a really interesting way?" Her firm focused on nonprofits that it perceived to financially healthy and interested in expanding operations. The director of a firm that provided exclusively *pro bono* services to nonprofits articulated similar criteria: "eligibility requirements for our classic projects are at least three full time staff, an active board of directors, [and] a minimum budget of $750K." She explained that she felt these criteria were important in ensuring that her firm's work would be implemented. Both firms articulated criteria that privileged successful nonprofits and those with what consultants felt was sufficient capacity to support a consulting engagement and implement its results--both shied away from small organizations and those in dire financial straits. In this way consultants served as gatekeepers, evaluating which

[159] Recall that both FocusImpact and WorldAdvisors, as nonprofit specialists, differed from corporate consulting firms like Analytico. Large nonprofit specialist firms, while using hypothesis-driven approaches, also incorporated facilitation in their work, while firms like Analytico prioritized analytics over discussion.

organizations were worthy of capacity building support and restricting access to those that met consultants' criteria (Grodal 2017).

While large firms restricted client eligibility based on budget size and financial health, smaller generalist firms tended not to. Recall the previous chapter's argument about small firms' strategies to enact relationships of solidarity and support with nonprofit clients--as part of this effort, small generalist firms went out of their way to *accommodate*, rather than filter on the basis of, nonprofits' available budgets. To reprise Jim's comment to this point, "if someone calls [InsightSolutions] and they have this cool idea and don't have a lot of dough, we'll try to figure out how to solve that problem so they can hire us, whereas I think other consulting firms say, 'oh, you don't have $40,000 dollars? Have a nice day.'" Additionally, small firms' prices were significantly lower than large firms' fees for similar services.[160] The fact that large firms like WorldAdvisors filtered potential clients according to budget while smaller generalist firms like InsightSolutions did not, reinforced a division of labor in the consulting field. Smaller nonprofits and less wealthy or well-connected ones were sent to smaller firms or independent consultants, while larger nonprofits and funders more often worked with larger firms.[161] This aligns with Faust's (2012) contention that the highest-status corporate consulting firms charged high fees and restricted access to the highest-status clients.

Some consultants' beliefs about how nonprofits selected consultants reinforced this division. Gina from Analytico explained her perception that choosing a consultant was based on board members' social networks--"for [large firms] that do *pro bono* strategies for nonprofits, it's very much personal connections--someone here is on the board, or knows someone on the

[160] For example, InsightSolutions charged $25K to $40K for a strategic plan.
[161] This was not always true. InsightSolutions, for example, worked with some large organizations, though the majority of their clients were smaller or medium-sized nonprofits. Also, prominent and specialized sole proprietor consultants were frequently retained by funders to carry out specific projects.

board. In the favor bucket." Alternately, as mentioned earlier, a funder could mandate that a nonprofit work with Analytico: "the foundation will say we are investing in this grantee, we want you to work with them […institutional] funders want to see impact metrics, process metrics, outcome metrics." Beyond these network-based matches, Gina told me that she thought larger nonprofits were more likely to prefer Analytico's approach to that of a smaller firm. "I think that the larger the group is, [the more] people want a dedicated effort, clear deliverable, and discrete beginning and end." Gina expressed a belief that nonprofits selected large firms primarily due to funder mandate or personal connections between board and firm, a situation that she thought became more likely as nonprofits grew in size and attracted corporate executives to board service.

In Gina's mind, the process by which nonprofits selected consultants belied a hierarchy *among nonprofits:* "There's a self-selecting prophecy. Nonprofits are picking their consultants, and the leadership team picks the firm that is going to jibe with where they really are. I think you have many more fact-based consultants selected when there is a new CEO that comes in saying 'I need to shake that place up.'" She suggested that leaders who were genuinely interested in change would select firms like Analytico, which she called "fact-based." Conversely, according to Gina, "people that are like, 'eh I'm doing this because the board wants to,' they aren't really ready" chose smaller firms that produced collective wisdom. She articulated a theory that working with large firms motivated change for client nonprofits while working with smaller firms was more likely to reinforce the status quo, arguing that this dynamic caused more and less-motivated nonprofits to gravitate to consulting support accordingly. Speaking from her position at the helm of a corporate firm, she obviously preferred large firms' "fact-based" approaches and exotic advice.

Gina's theory is suspect given that differences in consultant approach were difficult to detect at the outset of engagements, and consultants in small firms often complained that clients held them to expectations derived from high-visibility corporate firms like Analytico. Regardless of whether her theory was true in practice, though, in linking the hierarchy between large and small consulting providers to client nonprofits' level of motivation and willingness to change, Gina rhetorically reproduced hierarchies in the nonprofit sector. She reinforced the high status of large consulting firms and suggested the corresponding superiority and sophistication of large nonprofits, as compared to smaller nonprofits that she claimed were less motivated to change. Gina concurrently reinforced other facets of the consulting hierarchy--the superiority of seemingly "objective" exotic advice compared to consultants who facilitated collective wisdom, suggesting that changing nonprofit practice according to exotic advice represented the better choice for clients. In Gina's narrative, via the client-consultant matching process, the hierarchical structure of the field of consulting to nonprofits mirrored and reproduced similar hierarchies in the nonprofit sector.

Summary

As a whole, a multifaceted hierarchy based on status, expertise, and gender defined relationships between firms in the field of consulting to nonprofits. As consultants' critiques of each other's work and accounts of unsuccessful client relationships revealed, consultants in small firms were often held to expectations derived from corporate and large nonprofit specialist firms, which were the highest-status providers in the field. However, the hierarchy between firms contained additional dimensions related to expertise and gender. Consultants and clients valued exotic advice that was authoritative and separate from clients' understanding more highly than

collective wisdom produced by facilitating client opinions. Consultants in small firms both reproduced this hierarchy in attempting to distinguish their work from consultants they felt over-relied on clients' ideas, and argued that corporate firms' methods were inappropriately standardizing and inattentive to context. Additionally, senior men who served as leaders of small firms gendered the inter-firm hierarchy, identifying with and attributing masculine characteristics to exotic advice when attempting distance themselves from consultants who focused on collective wisdom, which they associated with femininity.

Via the division of labor produced by differences in large and small generalist firms' prices and strategies for identifying eligible clients, consultants reproduced hierarchies similar to those that characterized the consulting field in the nonprofit sector.[162] Small nonprofits, routed to small firms and sole proprietors, focused their strategic planning on those consultants' strengths--facilitating the collective wisdom of leaders and networks, which constrained clients' options to what was known to work locally and among similar organizations. This could be interpreted, as Gina suggested, as a sensible division of labor in which small nonprofits focused on internal consensus and local impact, or as limiting to small nonprofits' creativity and reproducing the status quo. Conversely, large, well-connected nonprofits working with large firms looked to different sources of information, with an inclination toward valuing exotic advice and corporate models over local knowledge and internal perspectives. Again, this could be sensible--corporate analytics could help make sense of complex organizations' operations. Or, it could amplify large organizations' potential characterization as out-of-touch with day-to-day reality and alienated from local constituents.

[162] The structure of the field of consulting to nonprofits and this homology between the consulting and nonprofit fields call to mind Pierre Bourdieu's notion of organizational fields, in which organizations occupying different field positions jockey and compete for resources held by others in different field positions (1993).

The reality of this situation likely mixed both interpretations. While the division of labor between consulting firms of different size in some ways made sense given the rich diversity of practice and organizational scale in the nonprofit sector, this same division of labor between consulting firms *mirrored and reproduced hierarchies* between nonprofit organizations. Large firms and their large nonprofit clients were considered superior--in terms of status and visibility, and in the tools and information they purportedly used to make decisions--when compared to small firms and their small nonprofit clients, which were viewed, at least by some consultants in large firms, as less sophisticated or rigorous. Rather than promoting inter-organizational managerial homogeneity, as the literature would suggest (e.g. Sahlin-Andersson and Engwall 2002; Hwang and Powell 2009) the structure of relationships in the field of consulting to nonprofits reproduced hierarchies in the nonprofit sector.

Intra-Firm Hierarchies

Similar hierarchies--in terms of status, expertise, and gender--were present *within* consulting firms.[163] In all three of the firms in which I conducted fieldwork, status- and gender-based hierarchies were built into the organizational chart--each organization was founded by a man, and had staff who were mostly women. While women served as firm partners and vice presidents in all three firms, in none had a woman assumed the role of CEO.[164] In all three firms

[163] Note that this section focuses specifically on consulting firms that were already organized in a hierarchical fashion--firms with both senior and support staff. My argument does not encompass sole proprietor firms, nor those that operated as collectives of senior-level consultants without support staff.
[164] At FocusImpact, the leader of the nonprofit practice was a woman, but the overall firm CEO was an older man. Additionally, exceptions to this pattern did exist--there were consulting firms working in the nonprofit sector that were led by women and had more significant proportions of men as staff. My intent in this section is to focus on patterns that I observed within the firms in which I conducted fieldwork, with the expectation that similar dynamics existed in other firms but the understanding that the status, expertise, and gender-based hierarchy I describe is likely to be differently or only partially applicable in other firms. For example, in some firms, status and expertise may define intra-firm hierarchies more than

the founder (who was a man) was the oldest firm employee. Given these characteristics, in such firms it was often impossible to disentangle hierarchies based on status, age, and gender. In this section, I will explain how intra-firm hierarchies manifested in the division of labor and reported differences in skills between consultants. I will then analyze how consultants invoked hierarchies based on gender, status, and expertise to explain bad experiences with clients, then correspondingly *using* these same hierarchies to advance projects with similarly hierarchical clients. Together, these practices, while sensible and realistic ways to do impactful work within existing nonprofit sector dynamics, led consultants to reproduce hierarchies in the nonprofit sector.

Hierarchies in Roles and Skills

Like in most hierarchical organizations, as InsightSolutions' president Jim was consulted during projects led by firm partners who were women, while the latter managed client relationships and did the bulk of project work.[165] In such consults, Jim and senior women often drew on different kinds of expertise. For example, at one point, Jim gave Ines advice about how to handle a disruptive board member. "Call him, and this is you speaking, on the phone standing up. 'I want to talk to you about your concerns [regarding the planning process].' Then you shut up and don't engage with him or banter. At the end say, 'are you going to be a productive member?'" Ines knew this strategy would not work, and responded respectfully. "What you say has an abundance of logic." She went on to describe the relational dynamics between her, the board member, and the rest of the board to justify her assessment. Ines waited for Jim to finish

gender does. These firms were also primarily white, with a smattering of people of color. While I do not cover racial dynamics in consulting in this dissertation, I plan to write about this topic in the future.

[165] Jim also led his own projects at InsightSolutions.

sharing his opinions, thanking him for his insight before explaining why it would not succeed. While Ines' deference to Jim can be attributed to status--he was older and CEO while she was younger and a partner, this exchange also had a gendered dynamic. While Jim prescribed a direct, stereotypically masculine approach to the client (Marsh 2008; Ridgeway and Correll 2004), in which Ines was to call him "standing up" and then "shut up and don't engage with him or banter," Ines countered with knowledge about relational dynamics that, as the last section showed, senior men associated with femininity (Ridgeway and Correll 2004; Schippers 2007) and regarded as less valuable than exotic advice.

Relatedly, in the consulting firms in which I conducted fieldwork, senior consultants who were women were praised as excellent facilitators while senior men were lauded for advisory skills and giving direct advice. At ArtsNow, partner Isabel was praised as a visionary facilitator. Early on in my fieldwork, Natasha took me aside and recommended, "get in a room with Isabel where people have crosswise objectives. That is where the magic happens." In comparison to Isabel, she said, the firm's other two partners--Arthur and Brian, were "also great," but had different skills.[166] At InsightSolutions, Ines was similarly known as a master facilitator; by contrast, as mentioned in a previous chapter, she brought Jim in to deliver bad news about a client's options for the future, when she felt "out of her depth in delivering straight shit." Indeed, Jim acknowledged this distinction in skills. Recall his statement in a previous section that "I'm not gonna just accept what you say. I'm gonna push back at you," and his narrative about leaving a facilitation workshop because "I was that angry guy in the room." When discussing his own strengths and weaknesses, Jim highlighted his facility in providing exotic advice, and admitted

[166] There is surely looseness in this system--firms founded by women did exist, and there were consultants who were men and also excelled at facilitation. My intention is to point out patterns that existed in my fieldwork and interviews.

that he became frustrated in contexts that he felt over-focused on relationships.[167] While Ines was praised for her facilitation and skill in creating collective wisdom, Jim distanced himself from these parts of consulting work.

Notably, for lower-level staff this gendered discrepancy in skills at times worked unexpectedly. An InsightSolutions staff member told me that some women at InsightSolutions were paid more than Samuel, a lower-level employee who was a man, due to the former's "people skills--Samuel is perceived as being less of a fit for the work [because he lacks these skills]." While senior men in consulting were praised for their skill in delivering exotic advice, small consulting firms' emphasis on soft skills in employees, a skill firm leaders associated with femininity (Ridgeway and Correll 2004; Schippers 2007), could lead to negative perceptions of lower-level employees who were men if they lacked these skills. Gender, expertise and status mixed together in the skills attributed to senior consultants, but for the few men in junior roles where the direct advising for which Jim was praised would be inappropriate, being a man did not yield an advantage.

The difference in skills attributed to senior men and women was also reflected in the roles different consultants played at InsightSolutions and ArtsNow. In both firms, older women served as managing directors--Anita at InsightSolutions and Isabel at ArtsNow--and were in charge of managing intra-firm organizational matters while CEOs (who were men) focused on client work and business development. Additionally, at InsightSolutions Ines led human resources and Lori, another partner who was a woman, led communications, while Jim focused on business development, a division of labor that persisted despite effort among the management

[167] While Jim's skill in delivering direct advice was praised by his colleagues and clients alike, at times clients complained that Jim's strong opinions about their work meant he did not adequately listen to their concerns.

team to distribute business development responsibility among all firm partners. Again, for Jim this distinction was intentional. During a meeting with Margaux and I, Jim commented that he "shouldn't say this" but "I really am not interested in managing and administrative stuff." He explained that he was talking with his wife about a staff member's upcoming maternity leave and realized that he did not know InsightSolutions' policy. "I assumed it was good. I'm interested in *the work*,[168] not the administrative stuff or managing people." This gendered division of labor aligns with studies of the advantages experienced by men in professions typically occupied by women (Williams 1992). Jim's avoidance of intra-firm work represented a sidelining of work that he deemed relational or "housekeeping" for women in the firm to manage, a common dynamic elucidated by gender scholars like Acker (1990; 2006), and scholars of carework, for example England (2005). A similar dynamic played out at ArtsNow, where Arthur led business development and Isabel focused on managing staff.[169]

It is important to note, however, that this division of labor was not purely a gender story. Ines and Isabel *were* gifted facilitators, and core to the consulting model is the idea that senior staff lead business development.[170] At InsightSolutions, Jim had the most extensive network among the firm's partners,[171] so his focus on business development was a natural fit. Additionally, Jim's ability to decline interest in managerial tasks was directly attributable to his high status, as the oldest employee and firm president. This status hierarchy mixed with a gendered division of labor within firms, in which senior women focused on internal management and were praised for their skill facilitating collective wisdom, while senior men who were firm

[168] My emphasis.
[169] While Arthur did the lion's share of business development for ArtsNow, Isabel also contributed to business development, as did Brian, the firm's other partner.
[170] Indeed, at FocusImpact both Marion and the firm's founder, who was a man, did business development work, though the founder remained "the face" of the firm.
[171] In interviews, many InsightSolutions clients said they ended up hiring the firm because they knew Jim.

founders claimed skill in delivering exotic advice and spent their time on business development, which they felt was more urgent and interesting work. As a whole, intra-firm dynamics mirrored the multifaceted hierarchy *between* consulting firms, incorporating status, expertise, and gender-based distinctions.

Using and Reproducing Status-Expertise-Gender Hierarchies

Demographics among nonprofit clients largely mirrored those in consulting firms--the client executives and board members with whom I interacted while conducting fieldwork at InsightSolutions and ArtsNow[172] were primarily, though not exclusively, men. To this point, Anna from ArtsNow described her experience attending ArtsNow-organized conferences: "I'm literally the only one in the room who doesn't have blue eyes. It's almost entirely men." Women in consulting[173] *noticed* client demographics and how their experiences differed from their colleagues who were men; they frequently discussed how they felt gender, expertise, and status-based hierarchies--both within firms and in client organizations--affected their work.

These hierarchies were at times explicitly invoked by women in consulting, in attempting to understand intra-firm dynamics and unsuccessful client encounters. In an interview, a consultant from InsightSolutions who was a woman acquiesced to an interpretation of expertise as associated with masculine characteristics to explain Jim's pejorative comments about "women in scarves" consultants, which she had also heard.

> As a man he's been socialized to think that expertise is more important than process and has been more comfortable owning his own expertise. He feels comfortable as an expert, he's been told expertise is important, he's a man. I think [statements like "women in scarves"]--it's maybe not intentional but purposeful that it's a woman in his mind doing

[172] I had fewer opportunities to observe client meetings in person at FocusImpact--many client meetings were conducted over the phone or via videoconferences in which I lacked access to video--so it is difficult to generalize about client demographics from that experience.
[173] The same was true for consultants of color, as client executives were primarily white.

> that work. When he thinks about the women in scarves process, he sees that as being about relationships. Process for the sake of relationships, which is something I don't think he necessarily values.

Regardless of whether her assessments of Jim were true, the consultant independently associated valuing expertise with masculinity and valuing relational skills with femininity. In doing so she re-articulated a hierarchy based on status (via age and formal position), gender, *and* expertise, recalling a documented phenomenon in which professional women experience men's "behavior as gendered, regardless of what the men may [see] themselves as doing" (Martin 2003:350; see also Williams 1992).

Relatedly, as another mid-level InsightSolutions woman told me, after unsuccessful client meetings other InsightSolutions women sometimes wondered aloud whether they "would have been taken seriously if Jim was in the room," as the head of InsightSolutions and an older man. This consultant questioned whether her colleagues over-relied on this interpretation--"maybe, maybe not. Maybe you just didn't say [your point] in the right way." Amanda summarized the underlying situation in our interview. "People take Jim as an expert more quickly than they do the other partners [who are all women]. I've been in so many meetings where [firm partners who are women] get questioned about their age, their level of expertise, where you can tell it takes people longer, men in particular, to trust that." She explained that senior women at InsightSolutions relied on the firm's strategic planning process for legitimacy, because clients, especially men, did not immediately trust their expertise.[174] This account aligns with Ambruster's (2006) observation that men outnumber women in corporate consulting due in part to the preferences of client executives, who are mostly men, for consultants who are men, and

[174] This phenomenon aligns with my earlier argument that client nonprofits often erroneously expected large firms' exotic advice when they hired small firms that focused more on collective wisdom, given that large firms, as the highest-status and -visibility providers in the field, defined clients' default expectations.

Rivera's (2012; 2015) work on the power of similarity in professional service firms. Again, Amanda invoked a multilayered hierarchy, in which partners who were women were disadvantaged based on their status (they were perceived to be younger), expertise (such that they focused on formal process), *and* gender, in order to explain these consultants' negative experiences with clients.

Recognizing the alignment between client preferences and intra-firm hierarchies, consultants sometimes *used* these hierarchies in work with similarly hierarchical clients. This was exemplified by the case of InsightSolutions' health and social services client. Once, on the way to a meeting with the client, Ines told me that she "almost wore a suit today because of the cantankerous board." She felt wearing a suit might help her overcome the client's hesitation to see her as an expert. Later in this client's strategic planning process, it became evident that some of the client's key board members, all men, were not taking Ines or me seriously. Back at the InsightSolutions office, Ines told Jim about this, explaining that a particular board member "doesn't see any woman as an authority." We decided to invite Jim to the next meeting, to try to recapture these board members' attention. We did so, and the dynamics in the room transformed. The two disgruntled board members exchanged jovial banter with Jim, sizing him up and slinging a steady stream of questions, clearly pleased when Jim confidently answered each question without missing a beat. At the end of the meeting, Ines acknowledged this effect. "What was missing from that conversation was what a provocative consultant--Jim" she touched his shoulder--"would say."

In this case, Ines and I *used* Jim's hierarchical superiority to the two of us to resolve difficult client dynamics that were stalling the project. The board members responded to Jim rather than Ines based on a combination of his status (older than Ines and firm president rather

than partner), his style and exotic advice ("a provocative consultant," as Ines put it, rather than her focus on collective wisdom), and his gender, in which each influence was impossible to disentangle from the next. While this strategy was effective, and potentially necessary, to advance the project, we concurrently reinforced and amplified the existing gender, status, and expertise hierarchy in both InsightSolutions and the client organization.[175]

When hierarchical dynamics between consultants and clients did not align in these ways, encounters could produce unexpected results. After a meeting with a prospective client, an InsightSolutions consultant commented that Jim's exotic advice had backfired. Though the board chair was "a very typical board chair figure--white, over fifty, male, authoritative, well-dressed, [Jim] was overly business-y"--he too-strongly compared the client's organization to a for-profit firm, which alienated the client and forced Jim to backtrack. In this case, Jim's exotic advice (comparing the nonprofit to a franchise) fell flat with a board chair who was also a senior man, despite Jim's status and gender-based advantages. When hierarchies aligned between consulting firms and client organizations, consultants highlighted and sometimes *used* these hierarchies to advance their work, reinforcing hierarchies in both consulting and the nonprofit sector; when consultants misjudged the level of such alignment, this approach could backfire.

[175] While consultants used intra-firm status, expertise and gender-based hierarchies to advance their work, the case of racial hierarchies was different. In 2017 and 2018, "Diversity, Equity and Inclusion" (DEI) was a dominant progressive trend across the nonprofit sector. At the mostly-white firms I observed, white consultants described themselves as advocates for people of color's equitable inclusion into white-dominated organizations. However, consultants minimized their own firms' racial homogeneity, focusing instead on shifting racial dynamics in client organizations. In attempting to promote racial equity to clients without alienating them, however, consultants embedded DEI principals in existing processes and "met clients where they were," ultimately limiting their efforts to disrupt race-based hierarchies. While space limitations prevent a full consideration of the DEI case in this dissertation, I plan to write on this topic in the future.

Summary

Just as the overall consulting field was organized by a status, expertise, and gender-based hierarchy, work within individual consulting firms featured similar hierarchical dynamics. My contention is not that consulting firms should *not* be hierarchical; indeed, given that the three firms in which I conducted fieldwork had pyramidal structures with a founder at the top followed by partners and midlevel and junior staff, hierarchy was built into firms' DNA. Rather, my intent was to detail the specific characteristics of intra-firm hierarchies, and to show how hierarchies in the consulting field mirrored and reproduced similar hierarchies in the nonprofit sector. Specifically, in the consulting firms in which I conducted fieldwork, firms' older founders (who were men) occupied higher positions on the status hierarchy than younger women who were firm partners, and founders who were men focused on business development and exotic advice, while senior women served as managing directors, focused on intra-firm management, and were praised as gifted facilitators of collective wisdom.

Like in the case of field-level hierarchies, status-based distinctions (in this case, related to age and formal position) combined with a preference for exotic advice over collective wisdom, with the former associated with senior men and the latter with senior women, and each layer impossible to disentangle from the next. Nonprofit clients had similar demographics and hierarchical tendencies--recognizing these dynamics, consultants invoked hierarchies based on status, expertise, and gender to explain negative client interactions, later using these same hierarchies to solve problems with similarly hierarchical clients. Through these practices consultants reproduced status, expertise, and gender-based hierarchies in the nonprofit sector and consulting field alike.

Conclusion

The structure of relationships in the field of consulting to nonprofits--including the uneven power and relationships of dependence between funders, consultants, and clients, the hierarchical distinctions between small and large consulting firms, and intra-firm status, expertise, and gender-based hierarchies--had pronounced effects on consultants' work, serving to reproduce existing hierarchies in the nonprofit sector, even as consultants promoted inter-organizational variation, rather than managerial homogeneity. It is important to note that this occurred, in most cases, in the context of consultants' sincere intention and hard work to support their clients as best they could. Tasked with helping their clients survive and thrive in a resource-scarce environment, consultants, for the most part, understandably negotiated their work *within* existing systems--including unequal power between funders and nonprofits and intra-organizational social hierarchies--in order to solve clients' problems. Therefore my finding that consultants reproduced hierarchies should not be interpreted to mean that consultants hurt nonprofits. Rather, the hierarchies that characterized the nonprofit sector and consulting field were impossible to avoid and often important to recognize and use, in order to give nonprofits realistic, practical advice. In this chapter I detailed *how* consultants experienced, thought about, and acted on these hierarchies to support their clients.

Funders, a key actor in both the nonprofit and consulting fields, significantly influenced consultants' work. In addition to providing clients with new managerial and programmatic strategies, consultants served as conduits between nonprofit clients and funders, supporting resource access for nonprofits able to hire them. However, the uneven power relations between nonprofits, consultants, and funders meant that consultants were not brokers--they did not facilitate a two-way flow of ideas between funders and nonprofits. Rather, transmission occurred

primarily in one direction--by involving funder preferences in planning and using strategic plans as fundraising tools, consultants transferred funders' interests into nonprofits' plans and perpetuated funders' power over nonprofit activity.

In addition, via distinctions between large and small consulting firms, consultants mirrored and reproduced other hierarchies in the nonprofit sector. The field of consulting to nonprofits was organized around a hierarchy based on status, in which large, prominent firms were higher status than small firms, and expertise, in which large firms' exotic advice was more highly valued than small firms' collective wisdom. Additionally, men who founded small firms identified with and attributed masculine characteristics to exotic advice when distancing themselves from consultants they felt over-focused on collective wisdom, which they associated with femininity. Differences in large and small firms' prices and client eligibility criteria in turn created a division of labor between consulting firms that reproduced similar hierarchies in the nonprofit sector. Large firms worked with large nonprofits and small firms worked with smaller nonprofits, with the former pair perceived by some to be superior and the latter inferior in status and in the information they used to make decisions.

Finally, intra-consulting firm hierarchies reinforced and reproduced existing hierarchical dynamics in nonprofit organizations. In small firms led by men and staffed by women, a similar hierarchy based on status, expertise, and gender structured the division of labor and skills attributed to senior men and women. While firm founders (who were men) focused on business development and delivering exotic expertise, senior women were managing directors, supervisors, and skilled facilitators of collective wisdom. Recognizing these dynamics and their clients' similar demographics, consultants sometimes recapitulated and used hierarchies based on

status, expertise, and gender to advance their work. Through these practices, consultants reinforced hierarchies in both the consulting field and nonprofit sector.

As a whole, the hierarchical structure of relationships in the consulting field--between funders, consultants and clients, between large and small consulting firms, and within individual firms, reproduced hierarchies, rather than contributing to homogeneity, between nonprofit organizations. In the context of theories of consultants as agents of normative isomorphism and institutional diffusion (DiMaggio and Powell 1983), this finding illuminates how the structure of relationships and the distribution of power in fields can shape how ideas diffuse and which actors influence these ideas. Unequal power between boundary-spanning actors (consultants) and those whose boundary was spanned (nonprofits and funders) caused boundary spanners to act as conduits for the more powerful actor to influence the latter. Hierarchical relationships between agents of institutional diffusion (large and small consulting firms) reinforced hierarchies between objects of diffusion (nonprofits), through a division of labor in who worked with whom. And hierarchies within diffusing organizations (consulting firms) reinforced those in objects of diffusion (nonprofits) through the particularities of day-to-day consultant-client relationships. Across the board consultants, rather than rendering nonprofits more managerially similar, reproduced hierarchies in the nonprofit sector concurrently with producing inter-organizational variation.

Chapter 8
Conclusion

Every year, consultants help thousands of nonprofit and foundation leaders navigate and take action on complex problems and changing environments. In my fieldwork at InsightSolutions, ArtsNow, and FocusImpact, I experienced firsthand (and to some extent felt myself) consultants' yearning commitment to *help* their clients. Consultants described themselves as therapists, midwives, oracles, teachers. "Help," in this context, meant a whole range of things. Consultants wanted to help their clients better run their nonprofits, which sometimes meant running them more like for-profit businesses. They wanted to help the people working in nonprofits be happier at work--consultants and their clients often genuinely cared about each other after months, sometimes years, of working together. Consultants wanted to help nonprofits better access resources in a dog-eat-dog world, and to help themselves make a living in this same context. Consultants wanted to help their clients highlight what made them special, and correspondingly what made the sector special--a commitment to making the world a better place, that consultants deeply shared. Consultants wanted to help their clients reform and evolve nonprofit practices to suit a changing environment, but to do so in a way that preserved what consultants saw as the unique characteristics of their shared, altruistic enterprise.

In this conclusion I will summarize the substantive and theoretical contributions of this dissertation and discuss its limitations. I will also dip briefly back into data in order to discuss how my conclusions might have differed if the study had been conducted twenty years ago, when the field of consulting to nonprofits was young. Finally, I offer thoughts about the implications of this work for consultants and nonprofit professionals, in general and in the context of the COVID-19 pandemic.

Summary of the Argument and Contribution

Existing literature about management consulting and nonprofit rationalization suggests that consultants carry and translate knowledge originating in the corporate sector into nonprofits, thus contributing to inter-organizational managerial homogeneity (Faust 2012; Hwang and Powell 2009). My research revealed a different role for consultants--they contributed to structural and managerial variation, rather than homogeneity, across nonprofit organizations.

Consultants' work and influence was, of course, more complex than this simple statement suggests. Consultants produced variation *within* a set of ideas they distributed consistently across organizations. Consultants consistently highlighted the language and general ideas of rationalization--the importance of formal organizational structure, a narrow focus and clear identity, decisive leadership, and closely coupled activities and outcomes in organizations. Consultants also consistently recommended that clients emulate existing practices in the field. Finally, their work reliably perpetuated funders' influence over nonprofits, privileged the opinions of people with power over nonprofits rather than those of people over which nonprofits had power, and reinforced existing inter-organizational hierarchies based on status, expertise, and, sometimes, gender. However, while consultants disseminated these ideas consistently across clients, their work processes did not yield correspondingly consistent recommendations for nonprofit organizational structure and managerial strategy--instead, consultants produced inter-organizational variation.

The boutique consulting firms on which this dissertation focused customized standard frameworks like Peter Drucker's "Theory of the Business" to accommodate clients' particularities, and blended consultant-generated data with clients' perceptions and lived

experiences, using *data as an object* to prompt discussion and thus introducing variation into the ideas for managerial practice that emerged from their work. Consultants also defined unique peer and stakeholder groups for each client and directed clients to different existing and rationalized practices depending on the characteristics of these distinct groups, a process that produced *mosaic replication* and *mosaic rationalization* in the nonprofit sector. Via these actions, consultants worked to define relationships of genuine support and solidarity with their nonprofit clients. As professionals with nonprofit backgrounds and mission-oriented identities working within for-profit firms, consultants correspondingly *mirrored nonprofit practices* in their firms' internal behavior and styles of talk, endeavoring to behave in ways they felt were appropriate to solidaristic relationships with nonprofits. Consultants distanced themselves from a profit motive and instead highlighted their commitment to making the world a better place. They moralized money, discounting their prices and providing labor beyond their contracted amounts. And they defined consulting as carework, repositioning consulting as within the nonprofit sector. As a result, consultants sometimes undermined their own firms' bottom lines and reproduced similar problems in their firms to those they helped nonprofit clients overcome.

Throughout this dissertation, I have told these stories about customization and consistency, nonprofits and for-profits, rationalization and reproducing existing practice, variation and homogeneity, analyzing diverse cases and elements of consultant practice using various theoretical lenses and scholarly perspectives on consulting work. Beyond what I was able to convey in individual chapters, these arguments often speak to and reinforce each other. Consultants' tendency to privilege people with power *over* nonprofits for stakeholder interviews was part of the same impulse that led them to reinforce funders' influence over nonprofits. Their preference for decisive nonprofit leaders aligned with the hierarchical superiority of *exotic*

advice over *collective wisdom* in consulting; decisive leaders also made consultants' practice of using *data as an object* to spark discussion easier, as leaders with strong opinions helped advance discussions and move projects forward. Using data as an object was part and parcel of consultants' approach to producing collective wisdom, and their attempts to define consulting as carework echoed the ways some consultants gendered collective wisdom as a type of expertise. And consultants' drive to customize their processes and recommendations to clients' unique circumstances was integral to their efforts to mark relationships of genuine support with the nonprofit sector and support their expressions of mission-oriented identities.

Explained in terms of nonprofit rationalization, my findings suggest that the process of rationalization in the nonprofit sector is much more heterogeneous than existing accounts suggest. While consultants may have, through their tools and practices, generally pushed nonprofits to become "more instrumental and focused" (Hwang and Powell 2009), this general frame did not beget managerial homogeneity. Instead, such vague prescriptions left significant space for on-the-ground variation in practice. What emerged through day-to-day practice was just as redolent of client nonprofits' opinions, pre-existing beliefs, and vested interests as of linear chains linking resources, activities and outcomes; consultant-driven rationalization was also oriented *inward* toward replicating existing nonprofit practices as much as *outward* to models from the corporate sector. Notably, this variation did not simply amount to consultants tweaking corporate strategies to suit the nonprofit context--instead, as consultants translated consistent tools and ideas into practice, local ideas emerged that differed from the meanings embedded in consultants' tools.

As consultants accumulated clients over the course of their careers, they propagated this variation across the organizations with which they worked. In the course of its twenty-five years

in business, InsightSolutions had worked with more than 400 nonprofit organizations. With each new client, consultants incrementally shaped and reinforced inter-organizational similarity and variation in the nonprofit sector, idiosyncratically grouping nonprofits together during peer research and customizing options and recommendations to clients' particularities and opinions. As consultants moved across the field, acting as ephemeral guides to--and "thought partners" in--organizational practice, they reinforced the heterogeneity of the contemporary nonprofit sector, while re-embedding existing practices and reproducing hierarchies between organizations and between organizational stakeholders.

As such, this dissertation provides an opportunity to better define rationalization in nonprofits while helping explain scholars' observations that despite widespread rationalization, the nonprofit sector is "not necessarily more cohesive, coherent, or successful" (Bromley, Hwang, and Powell 2012). In practice, rather than a consistent suite of structures and practices that rendered nonprofits instruments of social change and, at least managerially, more like their for-profit cousins, on the ground consultant-driven rationalization was heterogenous, composed of a combination of universalized organizational characteristics (Bromley and Meyer 2017) *and* existing nonprofit practices. These findings contrast with arguments about the convergence of the government, corporate, and nonprofit sectors (Bromley and Meyer 2017).

More broadly, these findings amend institutional theory about consultants as agents of institutional diffusion, normative isomorphism, and inter-organizational homogeneity. Rather than serving as carriers of management ideas into new contexts, consultants to nonprofits synthesized ideas from distinct sources in their work with nonprofit clients, producing structural and managerial variation, rather than homogeneity, in the nonprofit sector. Additionally, via my focus on consultants' ground-level work, this dissertation contributes a new perspective to

microinstitutional scholarship on institutional maintenance and change. Specifically, it contributes to conversations within the "institutional work" and "inhabited institutions" traditions about what actors working to shift or maintain institutions actually *do* (Lawrence and Suddaby 2006), and the role of relationships and interaction in institutional change (Hallett and Ventresca 2006). By showing that actors charged with diffusing institutional ideas and structures do not always do so in a complete or consistent manner, this dissertation helps explain why cases of complete and rapid institutional diffusion are rare.

What Has Changed

This dissertation, and these findings, represent a particular moment in time in the field of consulting to nonprofits. In this section I will return briefly to my data to suggest that consultants' contemporary practices, in which consultants produced structural and managerial variation, rather than homogeneity, across nonprofits, may be a fairly recent phenomenon as the field of consulting to nonprofits matured from its roots in corporate consulting, and as shifts in the nonprofit sector yielded increasingly complex problems for consultants to solve. I will suggest that the notion of consultants as carriers of management ideas and drivers of nonprofit rationalization may have been more directly applicable 20 years ago, when the field was young.

A Dwindling Funding Landscape

Throughout my fieldwork, consultants suggested that the nonprofit sector in which they worked was fundamentally different than in the recent past. Key to this shift, consultants suggested, was dwindling funding for nonprofits, and specifically for capacity building work,

over the last several years.[176] In an interview, Margaux described her perspective on how these changes affected nonprofits: "I think people are facing stickier challenges. […] I know a bunch of clients who have lost big federal contracts or have the threat of losing them, and that's just completely changing how they do things." At InsightSolutions, a diminished funding landscape caused Margaux's clients to reconsider their business models.

Consultants talked constantly about how this situation affected their work. A typical refrain from my fieldwork was how strategic planning projects, once straightforward, were now never so--consultants lamented the loss of "easy" clients and claimed that their recent clients faced more complex challenges than in the past. While this complaint could simply represent nostalgia for a perceived rosier history, on the trolley back from a client meeting, Amanda explicitly connected a changed funding landscape to the kinds of clients who might seek consultant services, suggesting that because there was less funding for strategic planning, "maybe only organizations with big problems get it." Ines correspondingly suggested that recent clients' need for in-the-moment advice rather than formal plans mismatched InsightSolutions' typical approach and timeline for strategic planning. "[We used to have] four meetings, […] then we write the plan. The end. Stuff is so fundamentally different for nonprofits than it was six, seven years ago. What they need is in real time--[our old] process does not fit the kind of questions they want answered."

Ines and Margaux discussed the consequences of clients' complex problems for InsightSolutions' daily work, in the context of needing to extend the timeline for a client's project. I asked how often delays like this happened, and Margaux sighed. "I am realizing that none of my projects are following a process. […] We used to be able to map out a whole process

[176] This phenomenon has been documented in the media; regarding Philadelphia, see Burnley (2017).

and schedule all the meetings in advance, but we can't do that anymore. There are so many twists and turns [in client projects]." In Margaux and Ines' telling, limited resource availability produced more complex problems for clients, which in turn made consultants' work harder, more customized, and less linear.

Consultants from larger and sector-specialist firms described similar trajectories. As Chelsea from FocusImpact put it, "we're living in a paradigm that's beyond catchall capacity building initiatives. Every nonprofit needs something a little bit different." In an internal all-team meeting, another FocusImpact consultant suggested, "everything needs more facilitation and person-to-person customization now--problems are more complex." A senior WorldAdvisors executive had a similar assessment. "The needs have become more complex in the nonprofit sector. Now, […] the questions we get go beyond the business plan." Susannah at ArtsNow made a related comment in an interview. "It's really hard to plan more than three or five years out [now], because things change so quickly. [ArtsNow strategic plans] used to be 10-year plans, we don't generally do 10-year plans anymore."[177]

From boutique generalist firms to arts sector specialists to large generalists, consultants marked the impact of what they perceived as a constrained and volatile funding landscape on their work, rendering standard strategic plans irrelevant, producing trickier client problems and correspondingly making planning processes more complicated and deeply customized. Consultants' accounts of *why* their work changed cannot be taken at face value and should be considered opinion rather than fact, but the idea *that* consultants' work had become more complicated and more customized is important context for this dissertation.

[177] In addition to funding changes, Arthur attributed this situation to professionalization in the arts: "30 years ago we were all about making sure you could deliver artistic excellence. But now, in addition to artistic excellence, you've got to deliver a whole bunch more in terms of outcomes and demonstrated impacts. And that requires a much more sophisticated enterprise."

A Maturing Field

In addition to changes in the nonprofit sector, the field of consulting to nonprofits had itself matured over time. As a senior WorldAdvisors executive reminded me, the field was quite young. "[The major corporate management consulting firms began] in the 1920s. So the for-profit field is a lot older. Consulting for the social sector was the domain of individual consultants until the last 20 years." Even so, in the course of my fieldwork consultants periodically mentioned their current practices as different from earlier work styles. A consultant from InsightSolutions put this clearly in an interview conducted toward the conclusion of my fieldwork. She told me that early in her tenure at InsightSolutions, she "felt like we were ignoring our clients' needs in writing plans. We were going through this process, checking off the box, […] it'd be a neat little plan and not too far off the mark. [But] organizations are messy and changing throughout planning; we're more in tune with that [now]." She suggested that InsightSolutions' work used to be more driven by standard process and less attuned to the complexity of client nonprofits' work. This changed, she suggested, as more senior staff with nonprofit backgrounds joined the firm: "Ines, in particular, because of her social-emotional intelligence, social work background, and deep desire to do right by the client, doesn't ignore those things."

The consultant illustrated this evolution in InsightSolutions' practice with an example about mission statements. "We would have one meeting about mission, […] walk out, and write a mission statement. Now people spend two or three meetings trying to build consensus, that's the time it deserves and the time it takes." As she put it, as InsightSolutions became more attuned to building consensus and to the complexity of client nonprofits' needs, the firm started

providing extra work beyond its contracted amount, creating financial problems: "That's how we end up outside our scope and losing money, because we're willing to engage on a deeper level."

Members of large firms told a similar story of early naivete replaced, over time, by appreciation for the nonprofit sector's unique characteristics. As a senior WorldAdvisors consultant told me, "WorldAdvisors was born from [a corporate firm]. When we started twenty years ago, the model was to bring tools [from our parent firm] to the nonprofit sector. For example, we used to think that you can substitute nonprofits for companies, and basically, it's the same thing." In this consultant's retelling, in WorldAdvisors' early years, the firm assumed that nonprofits were interchangeable with corporations and attempted to apply tools from its corporate parent company directly to the nonprofit sector. However, over time, firm members realized that this approach was insufficient: "We've learned it is not as straightforward. Not every tool translates well, and the way we tackle social sector problems looks different. Social change is driven by many factors [and people]." The firm adjusted its approach to address the many distinct elements and actors that drive problems and solutions in the nonprofit sector.

Edam explained how this adjustment manifested in WorldAdvisors' practice: "The work used to be much more consistent--business plans to be more effective at achieving your goals, bringing the rigor of for-profit work to nonprofits. Now WorldAdvisors does [many other things]." He went on to list WorldAdvisors' many services. As mentioned in a previous chapter, over time WorldAdvisors also created intra-firm practice areas, to provide specialized content expertise to the nonprofit sector.[178] A senior consultant from a large firm suggested that this

[178] Another consultant suggested an alternate explanation for the diversification of services among large firms like WorldAdvisors: "during the recession, WorldAdvisors had to be more nimble because foundations weren't willing to shell out $300,000 when endowments were shrinking and grantees had more needs. So it shifted to much shorter, more lightweight, more responsive consulting engagements, and stuck with that as the recession continued." This consultant suggested a less virtuous reason for

trajectory may characterize the field as a whole. "The field has grown and become more sophisticated over the past couple decades. People appreciate in the social sector that we should care about what works […] there has always been appreciation for planning but the idea that one can do that in a more rigorous way has taken hold."

It may be, therefore, that the arguments about consultant practice that this dissertation contests may have been more applicable twenty years ago, when the field was still in its nascency. As some consultants suggested, in the early years of the consulting to nonprofits field, consulting firms may have been less attuned to the complexity of nonprofit practice and how it differed from that of for-profit corporations. This led, in their telling, to firms directly importing tools from the corporate sector into nonprofits, and solutions that were mismatched to the specificities of nonprofit needs and complexity of work in the nonprofit sector. Indeed, the ways consultants described the early years of their work aligns closely with arguments, disputed by this dissertation, of consultants as carriers of corporate management knowledge and translators of that knowledge into new contexts. This dissertation can only suggest, rather than confirm, this historical progression--consultants' post-hoc reflections on the evolution of their field reflect the biases of particular practitioners. I can therefore only gloss a trajectory that would need confirmation via historical analysis.

Since that time, the field of consulting to nonprofits appears to have grown, diversified, and become more sophisticated. Some consultants have disabused themselves of the notion that tools from the corporate sector can be applied directly and consistently to nonprofits, developed an appreciation of the distinctions between corporate and nonprofit work, and specialized by investing in sector-specific expertise and staff with social sector backgrounds. This process may

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changes to consultants' practice over time, explaining diversification as a self-preservation strategy in the context of economic downturn.

have been compounded by shifts in the nonprofit sector related to the recession in the United States economy in the late 2000s and 2010s, in which funding availability dwindled, creating widespread and complex problems for nonprofits. The degree to which these forces gave rise to the consultants to nonprofits I observed is ripe for further research.

Limitations

In closing this dissertation, it is important to discuss the study's limitations. The primary limitation, which is particularly germane to the dissertation's argument about institutional diffusion, is that my research design did not afford significant insight into *what changes actually occurred* in nonprofits as a result of consultants' work. While I was able to interview a sample of InsightSolutions' clients about the effect of the firm's work on their practices and the degree to which they implemented the plans consultants produced, I was not able to directly observe the aftermath of consultants' work with nonprofit organizations. As such, the dissertation focused on the day-to-day work of consultants as agents of institutional diffusion and on the ideas about and recommendations for organizational practice they produced, rather than the material impact of consultants' practices on individual nonprofits. Put otherwise, the dissertation focused on the practices consultants *proposed* and the *ideas they produced* for nonprofit organizations, rather than the results of these processes.

Some scholars suggest that consultants' influence on practice is mainly superficial (e.g. Jung and Kieser 2012), and that organizations hire consultants for legitimacy and often decline to implement consultants' recommendations. Indeed, most clients I interviewed suggested that they only partially implemented InsightSolutions-produced plans--some did not implement the consultants' recommendations at all. This phenomenon may form the basis of future research I

conduct on this topic. However, if the consultants I studied did indeed have limited impact on nonprofits' practice, that would simply strengthen my argument about consultants as contributors to heterogeneity in the nonprofit sector--clients' decisions about what to implement and what to ignore would add an additional dimension of variation to the consultants-as-diffusers story.

Additionally, the dissertation would have benefitted from more sustained observation of large generalist firms, both those that serve exclusively nonprofits and those that work across the nonprofit and corporate sectors. While I made a concerted effort to access a large generalist or corporate firm for one of my comparison field sites, I ultimately was unsuccessful--despite long-term cultivation of potential advocates for my project, the corporate policies of these firms precluded sustained observation of their work. As a WorldAdvisors consultant told me, long-term observation was impossible because the firm inherited the security infrastructure of the corporate consulting firm from which WorldAdvisors was created, which prohibited multi-day in-office observation. To compensate for my inability to conduct observation of these firms' work, I spent one day in WorldAdvisors' office (the maximum I was permitted) and conducted as many interviews as possible with current and former staff of these firms at various levels of seniority. I also conducted two weeks of observation at FocusImpact, a medium-sized consulting firm that was often compared to and competed with large generalist firms like WorldAdvisors.

Finally, there exists very little available information regarding the prevalence and distribution of consultants to nonprofits across the United States. While I had hoped to produce insight on this topic through the survey of foundations I conducted in partnership with the Foundation Center, my survey's response rate was too low and the respondent pool too skewed to produce reliable data or facilitate robust analyses. As such, my claims regarding the typicality of InsightSolutions, ArtsNow, and FocusImpact's work in the sector and the relative prevalence

of sole proprietors, boutique firms, and large firms in the field are based on insights gleaned from dozens of interviews with practitioners across the country, and derived from those analyses of consulting work in the nonprofit sector that do exist--namely McGill et al. (2015).

Implications for the Nonprofit Sector

Consultants in the nonprofit sector are often regarded with suspicion, if not outright derision, by nonprofit professionals. Whenever I talked to colleagues working in the nonprofit sector about my research, they, without fail, complained about consultants hired by their organizations. Conversations tended to go something like this. "Gosh. [conspiratorial glance] consultants are such a waste of money. We had one, and I'm pretty sure the consultant did nothing." This idea is rampant in the popular press--take for example the 2005 book by Martin Kihn, *House of Lies: How Management Consultants Steal Your Watch and Then Tell You the Time.* This dissertation provided an opportunity to move beyond such dismissive statements to understand the practices of consultants who work for nonprofits, and the ways in which consultant-produced ideas influence the nonprofit sector.

Nonprofits and funders should, to some extent, take solace in this dissertation's findings. Consultants are not, for the most part, looking to siphon nonprofits' scarce resources or to deliver shallow or cookie-cutter work. On the contrary, most consultants to nonprofits care deeply about their clients and the nonprofit sector in general, and endeavor to do high-quality work that genuinely helps their clients, sometimes at the expense of their own firms' bottom lines. Consultants produce structural and managerial variation, not homogeneity, across the nonprofit sector, weighing client expertise and opinions as or more heavily than their own tools. It stands to reason, then, that consultants' recommendations can appear to clients as re-arranged versions

of what clients already know, rather than new insights. This phenomenon, however dissatisfying, is baked into the consulting process, at least for boutique firms, and in fact derives from consultants' principled allegiances to the nonprofit sector. While this revelation does not itself affect the degree to which consultants' work satisfies their nonprofit clients, it does suggest that at the very least, most consultants have their clients' best interests at heart.

However, my results also provide watchwords for nonprofits and funders seeking consultants. When looking for a consultant, nonprofits should be aware of the assumptions about good nonprofit strategies consultants bring to the table, and these assumptions' unanticipated consequences. For example, best practices often end up defined as common practices of similar organizations, which could limit innovation among nonprofits. Aligning plans with available funding reinforces funders' influence on nonprofits' work, and quick, economical planning work tends to cut audience voices out of the process.

As such, despite this dissertation's focus on consultant-produced variation, my argument also serves as a reminder of the durable hierarchies that shape work in the nonprofit sector and that consultants, working within hierarchical systems, reproduce in client engagements. Funders' differential power over nonprofits and consultants alike influences nonprofits' options for programs and approaches, and nonprofits in turn often prioritize the opinions of powerful individuals and organizations over those of audience members--individuals over which nonprofits have power. Additionally, the preference of most funders, nonprofits, *and* consultants for exotic advice considered novel and separate from client understanding reproduces the idea that certain ways of assessing and making decisions about nonprofit practice (often quantitative, seemingly "objective" ones) are more valuable than others (often those based on professionals' or community members' lived experiences) and that nonprofits affiliated with the former instead

of the latter are *better* or more effective in their work. These same ideas are visible in recent turns in the nonprofit sector toward outcome evaluation and strategic philanthropy (Katz 2005).

At the core, it is vital that we understand the assumptions that nonprofits, foundations, and consultants bring to their work together. To do so, foundations and nonprofits considering hiring consulting support must think carefully about what kind of advice they--or their grantees--truly need. Setting aside personal connections to consultants and popular brands, what sources and types of data do they find compelling? What will it take to convince decision-makers to take action? What kinds of organizations do they aspire to emulate? How do these needs match up with available resources and consultants? It is important, of course, to acknowledge practitioners' legitimate critiques of corporate firms' penchant to apply one-size-fits-all solutions across corporate and nonprofit clients. Ultimately, however, my research suggests that many nonprofits' dissatisfaction with their consultants is related to inadequate communication in both directions--from consultants regarding their practices and what they do and do not deliver, and from nonprofits regarding their assumptions and expectations.

Clear communication and honest assessments of organizations' needs and consultants' ability to meet them are particularly important in light of the COVID-19 pandemic, during which I completed this dissertation. We are entering what may be--and for most organizations, already is--a profoundly difficult and uncertain time for nonprofits and small business alike. In such moments of scarce resources and great and pressing need, transparent communication and mutual understanding between nonprofits and the consultants they hire to help focus and prioritize their work are even more critical.

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