

Teaching Notes – Kathleen Hower and Global Links

Case Overview

Kathleen Hower is co-founder and executive director of Global Links, a Pittsburgh-based nonprofit organization that provides medical equipment and supplies to countries in Latin America and the Caribbean.

The case study opens as Kathleen prepares to participate in the first annual “Fast Pitch” event hosted by Pittsburgh Social Venture Partners. She is one of several nonprofit leaders who have been selected as finalists for this event, competing for a \$20,000 prize for the best “pitch” to the assembled audience. The case then traces Global Links to its humble beginnings and describes the ambitious vision and distinctive operating philosophy of its co-founders. Kathleen and her partners decided early on that Global Links would obtain their materials primarily from the surplus of Pittsburgh’s many outstanding hospitals, rather than from manufacturers of medical supplies, equipment, and pharmaceuticals. This distinctive business model, somewhat unique in the international aid field, freed Global Links from the vagaries of corporate philanthropy and opened doors to public health experts who became partners in the mission, not just suppliers of surplus.

Kathleen and her team also decided to work directly with public health professionals in the target countries to be served and with regional health intermediaries like the Pan American Health Organization (PAHO). The aim was never to “dump” medical equipment and supplies on nations in need. Rather, the model was to tailor every shipment to the needs and capabilities of the recipients. To accomplish this, Global Links must work closely with experts on site.

The case study contains descriptions of several critical incidents in the history of Global Links. Each of these incidents helped mold and solidify one or more of the core values and the business model on which the organization was founded. Moreover, each incident illustrates a principle or behavior of effective leadership displayed by Kathleen Hower.

In the conclusion of the case, we return to the “Fast Pitch” event and listen in as Kathleen begins her winning pitch to the audience.

Uses of the Case

This case study can be taught in a variety of graduate or undergraduate venues including programs in public and nonprofit management, international relations and development, and public health. Within those programs, the case would be applicable in courses on management, organizational theory, international aid and development, strategic management, ethics, and leadership.

The case can be used to explore a variety of topics, including:

Operating values and vision: Hower and the other co-founders of Global Links had a vision for a different kind of medical relief agency – one that would work directly with public health officials in target countries to ensure that shipments of medical supplies and equipment would be tailored to needs and capabilities of recipient organizations. This business model requires extensive communication with recipient countries, navigating among multiple stakeholders and extensive investment in capacity building to ensure that the hospitals and health care facilities in the recipient countries can actually use and maintain the equipment and supplies shipped from the Pittsburgh offices of Global Links.

Beyond logistics, however, the Global Links vision is predicated upon genuine respect for the capabilities of recipient countries to articulate their needs and to work as genuine partners in the enterprise. As such, the relationship between Global Links and the recipient countries is one of true partnership, with a two-way flow of communication and exchange, not a one-way flow of philanthropic largess from the “rich” to the “poor.”

Among the questions that the class, or a subgroup, might discuss are:

- How did Hower and her team arrive at the core values and vision for Global Links?
- Where do “values” come from and how are they best articulated for followers and partners?
- When, if ever, should the operating values of the organization be modified?
- What opportunity costs did Hower and her colleagues incur by adopting and rigorously following their core values?

Mission fidelity: Several incidents presented in the case demonstrate how Kathleen Hower could have easily “bent” or strayed even slightly from the Global Links mission statement to pursue one course of action over another. In each case, the mantra of managing to the mission prevailed. In one instance, Hower even chose the difficult path of abandoning (temporarily) a country in which Global Links had established extensive “on the ground” infrastructure rather than yield to the demands of a corrupt politician who demanded that the shipments come to him for distribution rather than directly to hospitals and other facilities.

The class might be directed to consider the following issues:

- What is the difference between mission “growth” and mission “drift”?
- How was the mission of Global Links tested in this case? How did Hower respond to that test?
- Do you think the mission of Global Links should be adapted at this point in time? For example, is it time for the organization to grow beyond the geographic area it now serves? Should it expand the types of services and goods it provides?
- Are there opportunities to “replicate” Global Links? What would be the challenges in doing so?

Leveraging assets and comparative advantage: With its wealth of outstanding hospitals and medical training facilities, Pittsburgh provides a strategic advantage to an organization like Global Links. In particular, the University of Pittsburgh Medical Center (UPMC) is one of the nation’s largest and most prosperous health care systems. UPMC alone generates a huge volume of medical surplus each year. Other regional health systems, although smaller, also participate in the Global Links supply chain. In addition, the University of Pittsburgh as well as other regional colleges and universities are training centers for doctors, nurses, public health professionals, and international aid experts. Hower and her team have drawn liberally on these related organizations to build a comparative advantage that distinguishes Global Links among its peers.

Here are a few questions for the class to consider:

- What are the true distinctive competencies and comparative advantages of Global Links?
- What external opportunities aligned with the strengths of Global Links to create these comparative advantages?
- What should Hower and her team do to ensure that their comparative advantages do not erode?

Marketing by linking issues: Global Links ships approximately forty four sea containers of medical equipment and supplies every year. Not only do these shipments address pressing needs in Latin America and the Caribbean, but the

environmental impact is enormous as well. Much of this material would otherwise be disposed of by hospitals, thus adding significant additional burdens to landfills in the Pittsburgh region. Kathleen Hower and the Global Links staff rarely miss the opportunity to make this point, especially when addressing Pittsburgh audiences.

Here are some questions to consider:

- Under what conditions should nonprofit leaders attempt to link their particular mission to other tangential or related issues?
- How is the best way for nonprofit leaders to scan their environment for opportunities to link their mission to other issues?
- Under what conditions could such a strategy lead to mission growth? Mission drift?

Logistics Management: While the case does not present a particular logistics issue or problem, it may lend itself to an exercise in logistics management. Assembling and shipping over forty sea containers per year is a monumental task. The shipments headed to Cuba must to be routed through Canada due to US trade restrictions. The relatively small staff at Global Links relies on volunteers to keep the process moving. Management of this process on an on-going basis represents significant logistical challenges.

- What do you imagine are the logistical issues facing Global Links? Inventory management? Shipping? Navigating trade and commerce regulations?
- What methods of operations and logistics management might be relevant to Global Links?

Organizational Life Cycles: The Global Links case presents an intriguing example of organizational life cycles. Instructors might find it particularly helpful to engage students in a discussion of the particular challenges facing Global Links in the early years as Kathleen and her colleagues managed the organization out of their homes and then out of loaned space in vacant buildings. As it has grown and established itself as a credible and sustainable organization, how has it changed? What has remained the same?

- Based on the narrative of the case, what were the apparent challenges that Hower and her co-founders faced in the early days of Global Links?
- What additional challenges can you imagine were faced during those early years?
- What critical incidents played a role in helping Global Links survive and grow?
- Using life-cycle theories, what do you think is the current “stage” of Global Links (start up, growth, maturity)? What strategic issues tend to accompany that particular stage of an organization’s life cycle?
- Where should Global Links go from here?

Ethics, Integrity, and Accountability: Finally, the case is very useful in illustrating principles of ethical management, the personal integrity of the leader, and the accountability of Global Links for measurable outcomes and impacts.

- What ethical principles has Hower apparently followed when leading Global Links?
- What ethical choices do you imagine she and her staff face on a regular basis?
- To whom is Global Links accountable? For what is Global Links accountable? How should they document their performance (output, outcomes, impacts)?

Additional Readings

Starting and Growing a Nonprofit Organization:

Hopkins, B. R. (2009). *Starting and managing a nonprofit organization: A legal guide*. 5th ed. New Jersey: John Wiley & Sons, Inc.

Pakroo, P. (2009). *Starting and building a nonprofit: A practical guide*. 3rd ed. California: Nolo.

Life Cycle Management of an Organization:

Simon, J. S. (2001). *The five life stages of nonprofit organizations: Where you are, where you're going, and what to expect when you get there*. Minnesota: Ambrest H. Wilder Foundation.

Santora, J. C. & Sarros, J. C. (2008). Founders, leaders, and organizational life cycles: the choice is easy – learn or fail! *Development and Learning in Organizations*, 22 (3), 12-15.

Mission Drift and Mission Fidelity:

Crotts, J. C., Dickson, D. R., & Ford, R. C. (2005). Aligning organizational processes with mission: The case of service excellence. *The Academy of Management Executive*, 19 (3), 54-68.

Jones, M. B. (2007). The multiple sources of mission drift. *Nonprofit and Voluntary Sector Quarterly*, 36 (2), 299-307.

Humanitarian International Medical Aid:

World Health Organization (2011). Guidelines for medicine donations: Interagency guidelines. Revised 2010. 3rd Ed. Available online at: http://whqlibdoc.who.int/publications/2011/9789241501989_eng.pdf

Wall, A. E. (2012). *Ethics for international medicine: A practical guide for aid workers in developing countries*. Massachusetts: Dartmouth Publishing Inc.

Disaster Management and Response:

Redmond, A. D. (2005). ABC of conflict and disaster: Needs assessment of humanitarian crises. *British Medical Journal*, 330, 1320-1322.

McEntire, D. A. (2006). *Disaster response and recovery*. New Jersey: John Wiley and Sons Inc.