The Bridgespan Group

Effective Executive Teams

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Introduction

Over the past two decades, The Bridgespan Group has had the privilege of working with hundreds of nonprofit organizations to help them amplify and accelerate their strategic clarity and organizational effectiveness. Through this work we have come to deeply appreciate the role that executive teams play in the effectiveness and efficiency of their organizations.

It takes shared leadership, responsibility, brain-power, and diversity of perspectives and experiences to make and execute on thoughtful, well-informed organization-wide decisions, and monitor progress and course correct as needed. Simply put, the effectiveness of the executive team has a profound effect on the overall effectiveness of the organization. So the stakes are high and even if you think your executive team is already strong, there's significant upside to improving its performance.

In the pages that follow, we look at the different priorities, expectations, systems, and behaviors that can improve executive team performance. We also share a number of experts' perspectives, offering deep dives across critical elements of effective executive teams: how to lead a high-performing team, set the right priorities for its work, optimize its composition, lead effective meetings, support effective team dynamics, and finally, embed diversity, equity, and inclusion into its work.

Regardless of an organization's size or stage of growth, this special collection offers practical advice, tactics, and tools for getting the most from the work executive team members do together.

Increasing Nonprofit Executive Team Effectiveness

By: Libbie Landles-Cobb, Henry Barmeier & Kirk Kramer

Leading any enterprise is a challenge, especially for organizations growing in size and complexity. The job readily expands beyond the capacity of any single leader. That's why CEOs of many nonprofits establish executive *teams*—groups of senior leaders who work together to chart the organization's direction and keep it on track toward its goals.

Shaping a high-performing executive team is no easy task. Bridgespan's research reveals that most nonprofits falter when it comes to executive team effectiveness. Only a quarter of the 362 executive team members responding to a recent Bridgespan Group diagnostic survey "strongly agreed" that their CEO effectively addresses team dynamics and performance challenges. Only 19 percent strongly agreed that their team focuses on the right work, and just 17 percent strongly agreed that they use their executive team meeting time well.

Nonetheless, the survey also showed that roughly half of the respondents rated their team's performance as "good," or a three out of a possible four on overall effectiveness. But good isn't necessarily good enough. The upside potential of more effective CEO leadership, more clarity around the work of the team, and more productive team interactions can yield big gains for an organization—something we've seen at Bridgespan in our work over 15 years with hundreds of nonprofits. In short, the challenge is to advance from good to great.[1]

Our survey results came as no surprise to leadership coaches we interviewed. "Executive teams are an underperforming asset," says consultant and leadership expert Peter Thies, president of The River Group. "It's a huge investment and opportunity cost whenever you have top executives spending time together, yet executive teams tend to provide the fewest tangible results among leadership teams."

Who Needs an Executive Team?

Most nonprofit CEOs have a set of direct reports that meet regularly. At the most basic level, this group shares departmental information and receives updates from the CEO about recent decisions. While the direct reports comprise a group of senior managers, they do not necessarily work together as a team.

By contrast, an executive team takes on tasks that stand apart from the work individual members do as department heads. An

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executive team collaborates to shape organization-wide decisions and shares responsibility for the organization's results.

Not all nonprofits need an executive team that performs such work. For example, small nonprofits may only require a group that meets regularly to share updates. The decision to create an executive team rests on the size, complexity, and level of cross-organizational decision making required to lead the organization.

For nonprofits with an executive team, the team's effectiveness is essential for the organization's success. But despite their importance, surprisingly little has been written about them. In the for-profit arena, leadership experts have built an industry around executive leadership development and team building, though with minimal focus on executive teams. Nonprofit executive teams have gone virtually unnoticed.

Our research is informed by and builds upon the leadership and team-building work of others to address the singular needs of nonprofit executive teams.[2] Our survey, a diagnostic self-assessment, received responses from 362 nonprofit executive team members. In addition, we interviewed more than two dozen nonprofit leaders and an equal number of experts or coaches from academia and consulting. We also drew on our advisory experience in five cities with more than 200 nonprofit executive teams participating in Bridgespan's Leading for Impact program, a two-year engagement that helps nonprofit executive teams hone their management skills. Out of this research, we distilled a sequence of five steps, framed as questions, that have helped most executive teams increase their overall effectiveness—even move from good to great.

Five Questions to Guide an Effective Executive Team

1. Is the **CEO effectively managing** the executive team?
2. Is the executive team focused on the **most important work**?
3. Does executive team **composition** support its ability to do the work?
4. Do **meeting and communication** processes support superior decisions and execution?
5. Does the **team's dynamic** foster the right conversations and results?

1. Is the CEO Effectively Managing the Executive Team?

The executive team is the charge of the CEO. As head of the organization, CEOs are accountable for results and responsible for determining what the executive team must do to achieve those results. This played out in our survey, interviews, and in our experience with clients: in high-performing executive teams, the CEO takes charge of the team's form and function.

Specifically, these CEOs set expectations and define the executive team's work, steer meeting agendas, and support team members to grow while holding them accountable for performance. Managing the team does not require doing all of the day-to-day work of team coordination. In fact, many CEOs choose to delegate certain tasks to a deputy or other executive team members, such as getting input on potential meeting agenda items. CEOs with strong team players can even delegate leadership roles by assigning individuals as stewards for specific topics central to the team's work, such as diversity efforts, talent development, communications, or budgeting.

However, effective delegation does not mean abdication. To be effective, the CEO must maintain ultimate decision-making authority over what the team focuses on and how they do their work, while fostering strong relationships with team members.

Managing an executive team effectively also requires that CEOs should understand their own decision-making style and preferences and set clear expectations on which decisions will be their call (or another team member's decision) based on team input and discussion and which will be consensus decisions. Once those ground rules are established, it's important to follow through on those expectations.

Lack of clarity or inconsistency here can create problems for the team, such as when a CEO seems to guide a team toward a consensus decision only to exercise a pocket veto if the decision wasn't what the CEO personally preferred.

Many nonprofit CEOs lack the experience to perform their role as executive team leader. Nonprofit boards often prioritize external capabilities, such as fundraising or advocacy, over internal leadership skills when they search for CEO candidates. And even those who have strong internal capabilities are commonly stretched thin. As a result, it's not surprising that only one in four survey respondents strongly agreed that their CEO addresses team dynamics and performance challenges in a timely and effective way.

Skillful team management makes a big difference. The executive coaches we spoke with agreed that CEO leadership was the single most important factor in making teams highly effective. "The CEO sets the tone for the executive team," says Leslie Bonner, an adviser to nonprofits and a leading expert on nonprofit leadership. "If they don't prioritize the team's work or embody the productive behaviors required to do that work, it is very difficult for the team to work effectively." CEOs also set the culture of the organization "by identifying the underlying values that support the organization's mission," says Maria Hernandez, practice leader with InclusionINC, a global consulting firm specializing in inclusion and diversity. "People can be organized around great task management and great processes, but miss the mark on living the vision and mission of the organization that is to serve a diverse community."

2. Is the Executive Team Focused on the Most Important Work?

Getting clear about the most important things for the team to focus on—and just as important where it shouldn't spend its valuable time—is critical in determining who should participate and how the team should conduct its business. Clarity, however, eludes many teams. Only 19 percent of our survey respondents strongly agreed that their executive team focuses on the right work. One CEO put it this way: "Many teams end up sharing random, miscellaneous stuff, as opposed to things that are thorny and really either advancing or hindering strategy."

Typically, the right work involves guiding the organization toward achieving its top priorities and ensuring effective cross-departmental decision making and resource allocation. The executive team also provides an effective forum for input and discussion that helps the CEO make better decisions. In short, executive teams help CEOs do their job of leading the organization.

The team, however, doesn't necessarily need to play a role in all of an organization's priorities. Some may best be addressed by the CEO alone (like strengthening key funder relationships) or in consultation with specific departments or functions (like making specific programmatic decisions). As organizational behavior expert Ruth Wageman puts it, the trick is to determine "what are the critical few things that only this team of senior leaders, of all people in this organization, need to accomplish together versus individually or by other groups?"

Executive teams can home in on the handful of critical areas by focusing on those issues that meet the following two criteria:[4]

- **What issues are the most interdependent?** (Those involving multiple units or functions where cross-leader discussion is critical for effective decision making.)

- **What issues have the highest stakes?** (Those having the most impact on the organization's strategic clarity and priorities, programmatic and organizational effectiveness, development of future leaders, external reputation, and financial sustainability.)

The hours the executive team spend together are the most expensive on the payroll. The more the executive team focuses on issues that are highly interdependent and have the highest stakes, the greater the return on investment the executive team will have for the CEO and the organization.

Once an executive team has clarity about its work, it needs to determine what role it will play in that work. For some issues, the

Only **19%** strongly agree

their **Executive Team** is focused on the **right work**[3]

team's role will be to provide input on a decision that someone else (either the CEO or other individual or team) is responsible for making. For others, the team may make a decision itself. It is likely the team's role will differ by priority, or even by specific elements within a priority, so continuing to clarify what role the team is playing is critical to optimizing the team's time together.

3. Does Executive Team Composition Support Its Ability To Do the Work?
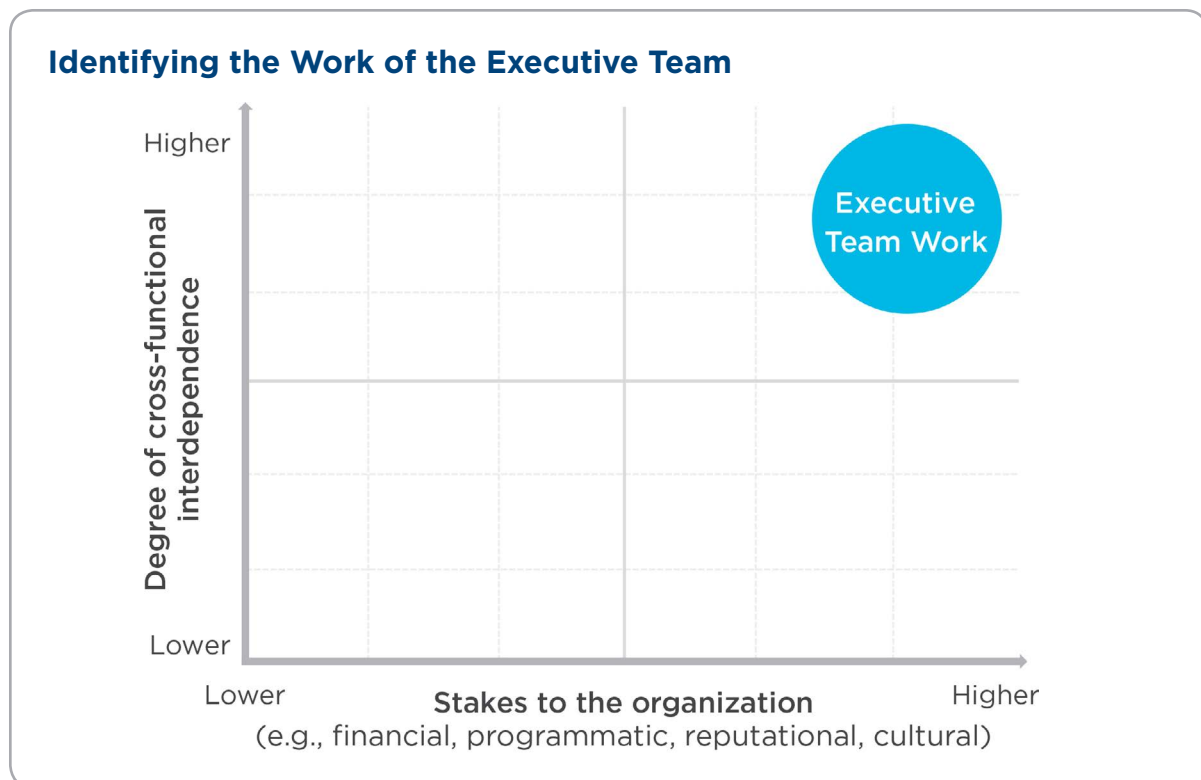
CEOs who rated their teams as highly effective balanced two critical questions:

- Does the team have the **key perspectives and competencies** to do its work?

- Is the team a **manageable size?**

Finding the right combination of perspectives and competencies may not result in a team composed only of the

CEO's direct reports. While it's critical that all executive team members be able to take a big-picture perspective and have business acumen, CEOs may choose to include non-direct reports whose unique skills are essential to the team's work. For instance, executive teams may include the director of human resources or a director of measurement and learning even if these individuals do not report directly to the CEO. Diversity among executive team members is another critical consideration. Currently, most nonprofit executive teams systematically under-represent people of color and do not reflect the diversity of the communities their organizations serve. This issue has drawn increasing attention, with stepped-up efforts to address it.[5] (See "Spotlight: Diversity, Equity, and Inclusion" at the end of the article.)

Including all the right perspectives can sometimes be at odds with keeping the team a manageable size. In fact, many

Identifying the Work of the Executive Team

Chart with Y-axis "Degree of cross-functional interdependence" (Lower to Higher) and X-axis "Stakes to the organization (e.g., financial, programmatic, reputational, cultural)" (Lower to Higher). "Executive Team Work" is positioned in the upper right (Higher, Higher).

nonprofit executive teams are too big. Almost a third of survey respondents reported having eight or more members, the upper limit of what research has found to be an ideal team size to have effective strategic discussions and team cohesion.[6] A common rationale for a large executive team is to increase inclusion and ensure leaders across the organization stay informed and coordinated. In these instances, CEOs could consider having two leadership teams—a smaller executive team for making critical organization-wide decisions, and a larger management team for maintaining coordination among departments. Executive and management teams should continually seek to augment their expertise and perspectives by gathering input from stakeholders (such as staff, clients, community members) central to the issues on which they are working.

Whatever the team's size, changing who sits at the table is difficult, but maintaining a status quo that isn't working comes at a greater cost to team and organizational effectiveness. Significant change events, such as the arrival of a new CEO or strategic pivots, present opportunities for reconsidering and altering a team composition. Many CEOs told us, however, that they wished they hadn't waited for the perfect time to make changes, particularly when it came to removing detractors who held the team back.

4. Do Meeting and Communication Processes Support Superior Decisions and Execution?

Well-managed processes around meetings and internal communications are essential for a successful executive team. "Meetings are the lynchpin of putting this all together," says Pat Lencioni, a best-selling author on leadership and organizational health. "They're the place where everything else

comes to life, and where you demonstrate whether you are an effective team or not." Yet, ineffective meetings and poor staff communications stood out as major pain points in our survey. Only 17 percent of our survey respondents strongly agreed that they have effective meetings, and only 11 percent said they communicate well with the rest of the organization.

Effective meetings require establishing the right practices, such as sufficient advance notice, clear purpose, the right amount of time and right location, and, often, pre-reads to prepare everyone for productive discussions. The most productive use of time also requires management of agendas to ensure that the urgent—immediate or unanticipated problems—doesn't consistently crowd out the high-priority work the team needs to do.

Effective teams use different types of meetings for different types of work.[7] Regular weekly or bi-weekly check-ins are effective for sharing updates and addressing immediate issues. Teams often need longer, less frequent

Only **17%** strongly agree their **Executive Team** uses **meeting time** well

Only **11%** strongly agree their **Executive Team communicates** well with the organization

planning meetings to wrestle with important decisions or dive deep on ongoing issues, such as developing talent or budgeting. Sometimes teams may need day-long or multiday retreats for team building, annual planning, or strategy sessions. The timing and cadence of these different types of meetings should be planned around the organization's calendar, including talent reviews, budgeting cycles, and board meetings.

Effective executive teams tend to conclude their meetings with agreement on decisions and actions, and a plan for following up and communicating with staff. Doing this well builds trust in the leadership, generates clarity around organizational priorities, and improves overall execution.[8] Yet, our survey respondents gave executive team communications with the rest of the organization the lowest rating of all the questions we asked.

"Productive action begins with productive communication," says Dekkers Davidson, a strategy consultant and former CEO

of companies large and small. "You have to be sure your communication is actually building alignment between the executive team and the rest of the organization." To build alignment through communication, CEOs and experts we interviewed said that executive teams can connect ongoing updates and decisions back to the organization's top priorities, and communicate overall progress against these priorities several times a year.

5. Does the Team's Dynamic Foster the Right Conversations and Results?

Building a cohesive executive team is essential for organizational success. A cohesive team also sets the tone for the rest of the organization, modeling the importance of collaborative behavior. Thirty-six percent of survey respondents strongly agreed that their executive team members work well together, higher than most survey responses. Even so, our interviews suggest that many teams underinvest in developing a productive working dynamic tailored to their specific work, expecting this to happen without intentional effort. "When people are together just by virtue of sitting next to each other, that is not enough to make a team," says Maria Kim, CEO of Cara Chicago, a $10-million workforce development social enterprise with 80 employees. Organizational strategy adviser and best-selling author Jon Katzenbach underscores that, "the successful teams we've observed all gave themselves the time to learn to be a team."

❝ When people are together just by virtue of sitting next to each other, that is not enough to make a team."

Maria Kim, CEO, Cara Chicago

Executive teams often must grapple with a pervasive culture of conflict aversion—a characteristic typical of nonprofits. In interviews with executives of nonprofit organizations, we frequently heard that team members hesitate to question a colleague's view or openly disagree. This reticence reflects a common nonprofit ethos of "we're all in this together" so don't rock the boat. But conflict aversion can come at a significant cost. Not only does the team miss out on the opportunity to wrestle together with hard questions, but disagreements can surface in hallway conversations, breeding mistrust.

Our research identified a set of dynamics that support productive engagement for an executive team:

- **Shared ownership:** Joint responsibility for agency-level tradeoffs and decisions beyond the work of an individual's department

- **Trust:** Psychological safety that enables interpersonal risk taking and confidence that the team will not embarrass or punish someone for speaking up

- **Constructive conflict:** Comfort with and encouragement of diverse perspectives and productive disagreement as necessary ingredients to innovation and good decisions

- **Collaboration:** Active listening, building on and connecting the ideas of others to solve each other's problems

- **Accountability:** Commitment to team processes, the decisions of the team, and holding each other accountable for expected performance

- **Equity and inclusion:** Shared commitment to elevate under-represented voices, value diversity, and understand and disrupt bias and privilege in the team and its work, and in the organization's culture

Only **17%** strongly agree their **Executive Team** adheres to clear **ground rules** for interaction

Once the team has agreed on a set of key behaviors, they hold each other accountable for sticking to them—a process the CEO leads and models. For example, to promote constructive conflict, team members might agree always to generate several meaningful alternatives to ensure they don't fall into group think. Finally, effective executive teams continue to invest in building personal relationships with each other in and outside of their formal interactions.

Putting Effective Practices into Action

Only one in four of our survey respondents rated their executive team highly effective. If your team is among the other 75 percent, imagine the productivity boost for your organization, and you personally, if the team were to advance from good to great.

Effective executive teams help CEOs do a better job of leading the organization. But it's up to the CEO to chart the team's

course and manage its journey. Every executive team success story we've seen in our research and client advising work was spearheaded by a proactive CEO.

Just as important, when an executive team is humming, each member benefits. They gain greater visibility across the organization, which informs their own work. And they participate in and learn from rigorous decision-making practices they can then bring to their own part of the organization.

The benefits are clear. Investing in executive teams can pay dividends for organizations and for their impact in communities they serve.

Spotlight: Diversity, Equity, and Inclusion

Executive teams at nonprofit organizations typically don't represent the diversity of the communities they serve or even of their staff. Among organizations that took our diagnostic, one-third have no people of color on their executive team. Prior surveys by Compass Point and The Meyer Foundation[9] and by Board Source[10] have also found that fewer than 20 percent of nonprofit CEOs are people of color. Yet researchers have determined that leadership diversity isn't just important from a representation standpoint. It also contributes to better decisions and stronger outcomes.[11]

The nonprofit leaders we've worked with, and the CEOs and leadership coaches we interviewed, are well aware of the need for more diversity on executive teams, especially when it comes to race and ethnicity. They described a variety of efforts to increase team diversity and guide their organizations to make equity a core value:

- **Make a strategic commitment to hire, promote, and support people of color:** CEOs determined to improve the diversity of their teams and organizations put resources and accountability behind their commitment to equity. This can include, for example, setting hard targets for recruiting and retaining people of color and actively tracking and reporting progress, and requiring a certain percentage of candidates for jobs be people of color. "When executives understand that their performance evaluation is linked to inclusive workplace cultures, you will see a more concerted effort to actually do the hard work," says Maria Hernandez of InclusionINC.

- **Increase equity competencies in all team members:** Having a diverse team is not good enough. Everyone on the executive team needs to take accountability for leading a diverse and equitable organization. This requires helping individuals on the team build their skill and comfort in behaviors like seeking out and valuing diverse perspectives, creating a culture of inclusion, and mitigating bias (explicit and unconscious) that create barriers for people of color. Trainings on topics like how to counteract unconscious bias can help increase awareness, understanding, and competency on these issues.[12] Training also promotes a culture of vulnerability where team members self-correct when they recognize themselves making unfair judgments and assumptions.

- **Embed equity in executive team decision making:** In making decisions, an equity-focused executive team doesn't necessarily have to achieve consensus. However, it's important to be transparent about decision-making processes and ensure inclusive input. Make time in discussion to draw out and amplify diverse points of view on the executive team.[13] In weighing options, it's also important to consider differential impacts of any decision on people of color.[14]

Notes

1   Jim Collins popularized the good-to-great concept nearly 20 years in *Good to Great: Why Some Companies Make the Leap and Others Don't*, Harper Business, 2001.

2   Particularly influential resources from the for-profit literature that informed our work include: Ruth Wageman, Debra A. Nunes, James A. Burruss, and J. Richard Hackman, *Senior leadership teams: What it takes to make them great* (Boston: Harvard Business School Publishing Corporation, 2008); Patrick Lencioni, *The Advantage: Why Organizational Health Trumps Everything Else in Business* (San Francisco: Jossey-Bass, 2012); David A. Nadler, Janet L. Spencer, et al., *Executive Teams* (San Francisco: Jossey-Bass, 1998); and Jon R. Katzenbach, *Teams at the Top: Unleashing the Potential of Both Teams and Individual Leaders* (Boston: Harvard Business School Press, 1998).

3   This and similar graphics throughout this paper reference data collected through a Bridgespan Group survey of 362 nonprofit executive team members. The survey was conducted during the spring of 2018.

4   Informed by the work of Bain & Company and by Ruth Wageman, Debra A. Nunes, James A. Burruss, and J. Richard Hackman, *Senior leadership teams: What it takes to make them great* (Boston: Harvard Business School Publishing Corporation, 2008), 68–75.

5   Sean Thomas-Breitfeld and Frances Kunreuther, *Race to Lead*, Building Movement Project, 2017, http://www.buildingmovement.org/pdf/RacetoLead_NonprofitRacialLeadershipGap.pdf; *Leading with Intent: A National Index of Nonprofit Board Practices*, Boardsource (2015).

6   Many researchers have identified smaller teams—those with fewer than 10 members—to be more beneficial for team success than larger teams. See Katzenbach & Smith, 1993; Moreland, Levine, & Wingert, 1996. Smaller teams also experience better work-life quality (Campion et al., 1993), work outcomes (Aube et al., 2011), less conflict, stronger communication, more cohesion (Moreland & Levine, 1992; Mathieu et al., 2008), and more organizational citizenship behaviors (Pearce and Herbik, 2004).

7   Patrick Lencioni, *The Advantage: Why Organizational Health Trumps Everything Else in Business* (San Francisco: Jossey-Bass, 2012), 175–185.

8   Holly H. Brower, et al., "A closer look at trust between managers and subordinates," *Journal of Management* 35, no. 2 (February 2008): 327–347, http://journals.sagepub.com/doi/pdf/10.1177/0149206307312511; Paul Zak, "The Neuroscience of Trust," *Harvard Business Review,* January/February 2017, https://hbr.org/2017/01/the-neuroscience-of-trust.

9   Jeanne Bell, Rick Moyers, and Tim Wolfred, *Daring to Lead 2006: A National Study of Nonprofit Executive Leadership*, CompassPoint and the Meyer Foundation (2006).

10 *Leading with Intent: A National Index of Nonprofit Board Practices*, Board Source (2015).

11 Rocío Lorenzo, et al., "How Diverse Leadership Teams Boost Innovation," Boston Consulting Group (2018).

12 Thomas-Breitfeld and Kunreauther, *Race to Lead*.

13 Caroline McAndrews, Frances Kunreuther, and Shifra Bronznick, *Structuring Leadership: Alternative Models for Distributing Power and Decision-making in Nonprofits Organizations*, Building Movement Project (2011), http://www.buildingmovement.org/pdf/bmp_structuringleadership_1.pdf.

14 Racial Equity Impact Assessement Toolkit, Race Forward (2009), https://www.raceforward.org/practice/tools/racial-equity-impact-assessment-toolkit.

How to Lead High-Performing Nonprofit Executive Teams

By: Roxane White

Effective executive teams are critical for many organizations to both maximize and sustain an organization's impact. Yet shaping this team to be high performing isn't easy. In fact, in a Bridgespan survey of 362 nonprofit executive team members,[1] only one in five believe their teams focus on the right work. How can a CEO ensure their team's time and efforts are well-spent?

Roxane White, the former president and CEO of Nurse-Family Partnership (NFP), a nonprofit that focuses on helping first-time, low-income mothers across the country, offers some advice. At NFP, she led a team of five, which eventually became eight, executives in the large, outcomes-driven organization. And over her career, she's led seven executive teams, including as the chief of staff for Denver mayor and then Colorado Governor John Hickenlooper. Until recently, she served as the Morgridge Innovator in Residence for Ascend at The Aspen Institute, and today she runs Strategy with Rox, which partners with clients on bold approaches to leadership development and support. In a recent discussion with Bridgespan, White drew on her leadership experience to share with us a number of ways she's approached leading teams for maximum impact. Here

we share her advice, in her own words, from that conversation.

Give your executive team a healthy dose of your time

There's no single "ideal" percentage of time a CEO should devote to managing an executive team but devoting time is essential. I once figured out I spend 40 percent on opportunities and challenges, 30 percent on external relationships and fundraising, 20 percent on leading my executive team, and 10 percent working with my board of directors. I prefer to think in terms of a monthly timeframe because if I have a board meeting or major fundraising push, I'd better spend a lot more time with my executive team planning for the board meeting.

Twenty-percent may seem like a lot, but it's what I need to ensure that my team members, and not I, are managing their areas. There's a great deal at stake when you consider that an executive team is responsible for marketing, communications, fundraising, operations, finance, and so forth. I've known CEOs who assume that, unlike regular staff, senior teams don't need to be held accountable for block-and-tackle goal setting and meeting objectives—it's assumed they're very smart and know what to do. My problem with this thinking is I've known too many development directors who didn't know exactly how much money they had to raise in a given year, and too many program directors who couldn't say exactly what their teams needed to do to

Roxane White *is the former CEO and president of the nonprofit Nurse-Family Partnership, and founder and CEO of the consulting firm Strategy with Rox.*

deliver quantifiable results. To prevent this kind of atrophy from quantifiable goals, I meet with each one of my executive team members every week, even if it's just via Skype or Facetime, or while one of us is killing time at an airport or on a train.

Executive team meetings are expensive, so make them count

I'll admit to being a bit obnoxious about always knowing how much it costs per hour in executive team salaries to simply convene an executive team. I structure meetings to engage my team, keep things strategic, and avoid having a $3,000 per hour meeting to make a $100 decision!

I generally discourage overreliance on PowerPoints as a substitute for compelling narrative and dialogue, since presentations are at least as likely to deflate a meeting as energize it. I also ask that people be given enough time to read materials assigned beforehand—at least 48 hours for two or three pages—and I'll cancel a meeting when we're not prepared. It is better to use that time to be ready for the following week. I hate it when we come to a meeting pretending to have read the material. Decisions that are made at those meetings are seldom kept.

Every topic that becomes part of the executive team agenda follows a three-fold process of information, input, or decision. My weekly one-on-ones give me a chance to coach team members about determining which agenda items ought to be solved at the department level and which need to be advanced to inform, receive input on, or be decided by the whole executive team.

Finally, I'm a big believer in follow-up, usually written communication, that lays out what we discussed, any action taken on agenda items, and a heads-up on key upcoming decisions we're going to be making. Reporting out like this keeps the executive team accountable to one another and demystifies our activities for our entire staff. This removes the feeling of secrecy that may keep the organization from moving forward in a healthy way.

Conflict is probably inevitable, so meet it head on

Managing an executive team, the CEO is bound to confront instances where team members just aren't jelling. One telltale sign involves members who complain about each other without talking to each other about their concerns. Another sign involves somebody who consistently comes unprepared to meetings or never submits items for consideration. My response to both situations is pretty frank: I ask them, "Do you care enough about the person or our mission to find a way to be honest about what's wrong?"

While the answer ought to be "yes," not everybody handles crucial conversations in the same way. One person is going to do it over drinks, while another will fire off a nastygram, think twice about it, and then hightail it over to the recipient's office to explain things. I'm comfortable with a range of styles—as long as they have the conversation.

Sometimes, the organization truly has outgrown a senior staff member. For example, the leader who came to work at a small nonprofit and suddenly finds they're at a national organization with plans for even greater expansion. They may be fabulous, talented human beings, but now they're thinking, "Maybe I don't fit here anymore?" If your lines of communication are open, you will prevent surprises and

head off angry feelings should they end up leaving. It's not a failure to no longer "fit" with an organization.

Unify your team around diversity and shared challenges

I think diversity in race, ethnicity, gender, and then extroversion and introversion, and so forth is very important. In my mind there's no excuse anymore for not having a diverse executive team. So, I start with a diverse team of people representing different backgrounds, levels of expertise, and points of view. I also look for people who offer a diversity of management and leadership styles and skill levels. For example, it's not going to help an organization if everybody in the executive team is a fabulous leader but just a decent manager, or if everybody is a fabulous manager and only a decent leader. You

have to have that balance between these skillsets. This may sound obvious, but it means you may have to pass over a strong leader because what your team really needs is more management talent.

Then, I make sure we're all pulling in the same direction, joined together in a common mission. I'm not a big "go off into the wilderness together and bond leader," but I do spend time building the team's unity. I'll go out of my way to pair members of my team on difficult assignments— maybe on an important hire or project—just to build a bond. And I'll be the first to admit there's nothing like solving a great crisis for bringing together an executive team!

Notes

1   Libbie Landles-Cobb, Henry Barmeier, and Kirk Kramer, "How to Create Better Nonprofit Executive Teams," *Stanford Social Innovation Review*, October 17, 2018, https://ssir.org/articles/entry/how_to_create_better_nonprofit_executive_teams.

How to Define the Work of Nonprofit Executive Teams

Q&A with Libbie Landles-Cobb & Ruth Wageman

As a leadership expert and co-author of Senior Leadership Teams: What It Takes to Make Them Great, Ruth Wageman has experienced firsthand the dissatisfaction

Ruth Wageman *is co-author of Senior Leadership Teams: What it Takes to Make Them Great, (HBS Press) and an associate of the department of Psychology at Harvard University.*

many executive team members express about the lack of clarity they have around their purpose as a senior team. "They don't really have a framework for imagining what's possible for a great leadership team," she told us in a recent interview. "They rarely have experienced meetings they look forward to attending, and in fact, they might dread them," she adds.

Recent Bridgespan research echoes her experiences. In a survey of 365 executive

team members, Bridgespan discovered only 19 percent felt their teams focus on the right work. And only 17 percent strongly agreed that their meeting time together is well spent.

In this Q&A with Wageman, Libbie Landles-Cobb, co-author of "How to Create Better Nonprofit Executive Teams," dug into how to define and prioritize the work of the executive team and thus focus its valuable time on the right things.

Libbie Landles-Cobb: You have worked with many executive teams over the years. Why do you find that it is important for executive teams to get clear about the work they should focus on?

Ruth Wageman: Really the underlying question here is "What is the impact on the organization overall when the executive team is not focused on the right things?" There are several challenges I have seen when the team is not aligned on the work it should focus on.

First, I see a lot of executive teams spending time on issues that teams much closer to the work could handle better. What happens then is that the organization's staff, who come to the enterprise with a tremendous amount of energy and talent, end up being frustrated because they are micromanaged or misdirected by the executive team.

On the other hand, many executive teams don't prioritize the critical issues that they should be responsible for: issues that are complex and affect the whole organization. This prevents them from accomplishing powerful outcomes on behalf of the constituencies that they're supposed to be serving.

I also see teams spending an awful lot of time merely exchanging information or providing each other with updates. When this happens, team members end up feeling like their time would be a whole lot better spent focusing on the "real work" that they have been asked to do as individual leaders.

All of this can produce a lot of frustration for team members, including the chief executive. Being a chief executive can be lonely job. It can feel like you're trying to push a giant boulder uphill all by yourself when you could have a strong team of aligned and talented leaders helping you move it.

Libbie: That really resonates with my experience working with executive teams. The only thing I would add is that when a team is not clear about what their priorities are, the urgent almost always crowds out the important. So if a team has not clarified what it is accountable for and aligned its agenda to that work, it will end up focusing on whatever feels most pressing at the time of its team meeting, even if that's not the most critical use of the team's time.

Ruth: I agree. There are certainly times when something unexpected happens that needs the attention of the whole executive team. But many things that are considered "urgent" don't actually require a collective perspective from the executive team. Even worse, constantly focusing on the urgent can crowd out the things that would benefit from the team's leadership, like "How are we imagining the future?" "What are the strategies that we should be considering?" "What are the threats and/or opportunities that we're seeing in the world?" Those big questions that really would benefit from the perspective of the whole executive team never get the room on the agenda that they deserve.

Libbie: In your work, how do you help CEOs and teams determine what work the team should focus on—and what they shouldn't?

Ruth: The big questions the team needs to answer are: What should this team do together as a unit? What are the things that only this leadership team can do? And what are the must-win battles that we really need to take on?

In many cases, the chief executive has to answer these questions before engaging the team. I do a lot of one-on-one coaching to help chief executives think through what their priorities are and how having great teams with a broad perspective, real alignment, and shared decision making would make the outcome so much better than one person's perspective alone. I ask them a series of questions to help them do this (see the sidebar "Defining Your Team Purpose"). Once the chief executive has drafted a short list of the most critical decisions, I have them share it with the team and invite questions, reactions, and amendments. The team has to own the team purpose, of course, and this iterative practice helps that.

For some teams, I have them do an exercise where members of the team embody key stakeholders and tell the team "here is why I need you to be in an aligned leadership team." Not only does this build empathy with critical stakeholders and their needs, but it also helps the team get clear about what the organization and its customers and partners need from them and who is impacted by their work.

Libbie: I agree that getting this clarity starts with the CEO. One tactic we have used with teams is to have the CEO draft a list of the most critical 10-15 organizational priorities over the next 12 months. The list includes both time-bound initiatives the organization is working on as well as ongoing organizational leadership responsibilities, like developing talent pipelines and managing cash positive financials.

Then the team works to refine that list and identify which of those priorities should be the work of the team by asking two questions: Which priorities are the highest stakes? Which priorities are the most interdependent? Those priorities where the answer is "yes" to both questions should be the focus of the team. The other priorities may be led by individuals on the executive team, but should not be a core focus of the team's collective work.

I learned this notion of interdependence from your work. Can you talk about what you mean by interdependence?

Ruth: The executive team should be focusing on things that, in order to be done well, require the team to truly interact together. In my book I highlight a few characteristics of interdependent work:

Work that requires a shared answer, where decisions need to be made collectively on behalf of the entire enterprise rather than the interests of any one function

Work that requires true collaboration— serious time devoted to debate, interaction, resource sharing—from the team

Decisions or initiatives that need aligned communications and implementation across the organization

In other words, the executive team should be focused on issues that are going to affect many parts of the organization, where the outcomes will be way better if multiple intelligences, perspectives, and champions are applied to it because it's really too complex for any one person to lead on their own.

Once the team has refined the list of priorities it should focus on, it's then important to discuss how it will live into that work. Do these priorities shape every agenda for every meeting? What would

specific measures of team success look like? What would it need to stop doing in order to achieve it?

Libbie: We hear from teams that it's nice in theory to identify the most critical work for them to focus on, but it's hard in practice to focus on that because there are so many fires to put out. What advice do you have for teams struggling with this?

Ruth: As much as possible, executive team time should be viewed as protected space. It is critical for the CEO to determine how best to spend that time by owning the agenda for all executive team meetings. They are the best positioned to decide where the team should focus on any given day.

This doesn't mean the CEO doesn't care about the urgent issues facing each individual leader, but they are able to pull up from immediate concerns and prioritize what's best for the organization overall. "We have these strategic questions that require our attention and that people are waiting for us to articulate a view on, and these are the issues that most require our collective work." Anybody has the right to say, "There is a crisis happening that is going to affect our reputation and our impact in the world and how to handle it would benefit greatly from our aligned views on it." And that may be the right call, but too many times what's claiming the team's time—what feels really urgent—really belongs to individuals or to a subset of individuals, not the executive team.

If you don't have a meaningful, well-intended, well-crafted agenda of items that aligns to the work of the team, you are going to lose the battle against the urgent every time.

Libbie: Wonderful words to end by. Thank you so much for your time!

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Defining Your Team Purpose: Reflections for Chief Executives

What decisions do you want this team to make as a team? Some useful categories:

- Defining strategy
- Strategic investments of resources
- Principles of organizational systems
- Managing high profile external relationships
- Incubating new capabilities
- Shaping organizational culture and leadership model

What do you need to keep in your portfolio as the chief executive?

What do you want this team to be known for? "This team exists to…"

What would success look like for this team if they were to accomplish it? "If we are successful, then…"

Source: Developed by Ruth Wageman and Kristen Lowe at Team Diagnostics

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How to Optimize Nonprofit Executive Team Composition

Q&A with Kirk Kramer & Nicki Roth

During her career as a leadership consultant, Nicki Roth has seen countless variations on executive teams—both for good and ill. But regardless of organization size and structure, certain questions about group composition keep floating to the surface for the leaders of these teams. As an executive director, how do you ensure you have the right people, in the proper roles, on your team? Roth recently shared some advice with Bridgespan Partner Kirk Kramer.

Kirk Kramer: What are the key hurdles for executive team leaders who are looking to create highly effective teams?

Nicki Roth: Understandably, executive directors and their boards often focus on strategy, funding, growth, and impact. Their primary goals are to get strong players in specific roles with clear functional expertise. Over-focusing on those goals, however, can lead to selecting the wrong people. Beyond functional skills, you need to know if these people have management experience and the ability to develop talent or that they can be trained to do so. Also, can they be team players who think strategically and holistically about the organization and its future? If the answer is "no" to any of these questions, then you may need to rethink some of these folks, regardless of their functional talents.

Nicki Roth *is the president of Roth Consulting and author of the Get Real Leadership blog.*

Kirk: Can you give us an example?

Nicki: Sure. One of my clients, Dana [not her real name] had been the executive director of a small early childhood education nonprofit for 12 years. As the organization grew, she created an executive team. After seven years, the team had stabilized around three key people. There was Jeffrey, a veteran nine-year leader hired as one of the first 10 people at the organization. Dana also promoted Tony, previously head of a key service area, after six years with the organization. Tony was the first person Dana assessed for leadership skills as part of the selection process. Nailah was the newest hire and had come onboard after 12 years as a leader at another organization. Dana wanted her to bring in fresh thinking and leadership experience.

Even though Dana kept the group small, she still struggled with the team dynamics. She observed that every time the team was about to break with the status quo, Jeffrey pushed back and derailed the discussion. It was also apparent that Nailah was a more talented leader, and this skill gap contributed to the team not quite coming together.

Kirk: So what did Dana do to address the situation?

Nicki: She started by meeting with Jeffrey to develop his leadership skills. When that didn't help, she hired a professional coach to work with him. Neither approach improved the situation. Meanwhile, his attitude created tension with Nailah, who wondered why Dana had not fired him. And

Tony felt torn down the middle trying to placate all parties.

The dilemma that Dana faced is typical of what I see with most nonprofit executive teams. Rather than a group of equally skilled leaders pulling in one shared direction, there is a loosely connected group of functional heads. To reverse this trend, executive directors, with support from their boards, must address critical team composition issues.

Kirk: What are some of the critical issues you frequently see?

Nicki: Often, there isn't enough forward thinking. Leadership team members are often selected for the present but based on the history of the organization. Just because someone has made valuable contributions doesn't mean they are a leader.

Also, there's comfort in maintaining the status quo. If an organization's strategy hasn't been revisited in more than five years, organizations can find that they keep the current leaders in place without considering whether or not their undertaking the right activities or have the right capabilities to lead the current organization.

Lastly, organizations need to make conscious decisions to ensure diversity on the leadership team. Members ought to mirror the community being served and provide role models for staff. Additionally, the mix of backgrounds, age, gender, and experience creates more robust and stimulating input that aids organizational advancement.

Kirk: What is a good starting point for considering who should be on your executive team?

Nicki: Imagining the future and what organizational capabilities need to be developed is a strong starting point

for thinking about the executive team composition. Executive directors should identify the leadership skills the organization needs to achieve its strategy. If there is a new strategy, a growth spurt, a significant shift in funding, or simply stagnation, it is vital to step back and assess what competencies and vantage points the leadership team needs in order to meet the challenge.

Doing this doesn't come naturally to most nonprofits, but it's worth the hard work of identifying and learning necessary leadership skills. A comprehensive discussion and inventory of required leadership traits provides two things: focus on what it will take to achieve the goals and a path for leadership and talent development.

Once you've identified the skills the organization needs, you can assess how many and what new leadership roles emerge. Does a new focus on fundraising mean the development director needs to be on the leadership team? Does a slew of new administrative functions mean you need a chief operating officer?

Don't get stuck on who you currently have or budget constraints or legacy roles. Once you know the roles that you need, you can work with your board to sequence these changes over time to be in sync with long-range plans.

Kirk: What if your current team doesn't have the right people with the necessary skills to fulfill those roles?

Nicki: Looking at the specific individuals on your team and how they might fit those roles comes last. If you have done your analysis, you will form a new outlook on what you need on your team. The team will undoubtedly need to have members who can think systemically, move beyond

functional expertise to manage the whole organization, assume greater authority and accountability, engage in broader and more strategic discussions, collaborate effectively with others, represent the organization to external partners, and share the daily challenges of running the place. This clarity will necessitate some tough decisions. Some current team members may no longer be a good fit while others will need to stretch to develop new competencies. As the executive director, it's your responsibility to meet organizational needs. It may be that you need to take the uncomfortable step of asking someone to leave or create a detailed development plan for someone to build the skills and competencies needed to serve on the executive team.

In the previous example, Dana went through a team composition analysis before she hired Nailah. And when she saw that Jeffrey was remaining an obstacle despite attempts to help him develop necessary skills, Dana had to face the moment she had been avoiding. Jeffrey was not surprised when Dana talked to him about his exit. Even though he was hurt, he said he actually wondered what had taken her so long.

How to Lead Effective Nonprofit Executive Team Meetings

By: Libbie Landles-Cobb

Ineffective meetings stood out as a major pain point in Bridgespan's research for "Increasing Nonprofit Executive Team Effectiveness." Only 17 percent of nonprofit executives surveyed strongly agreed that their meetings were effective. Disappointing considering these meeting, notes Patrick Lencioni, best-selling author on leadership and organizational health, are part of "where everything comes to life, and where you demonstrate whether you are an effective team or not."

How does an organization ensure its executive meetings turn from ineffective time sinks to ones that engage and meet their intended purpose? To start, nonprofits can establish some good practices to help prepare team members for productive discussions: offer adequate advance notice, set a clear purpose and agenda, and share pre-reads, when relevant. During the meeting, you also can practice good time management to ensure executive team priorities aren't crowded out by urgent issues (see more in "Increasing Nonprofit Executive Team Effectiveness").

Lencioni further suggests in his book, Death by Meeting, avoiding two basic problems that meetings frequently suffer from: they're boring and they lack context and purpose:

Problem 1: **Meetings lack drama, which means they are boring.**

Libbie Landles-Cobb *is a partner in Bridgespan's San Francisco office.*

Solution: Put the right issues—often the most controversial ones—on the table at the beginning of meetings. By demanding that people wrestle with those issues until resolution has been achieved, you create genuine, compelling drama, and prevent your audiences from checking out.

Problem 2: Most meetings lack context and purpose. Meetings can be a confusing mix of administrivia, tactics, strategy, and review, all of which creates unfocused, meandering, and seemingly endless conferences, with little resolution or clarity.

Solution: Differentiate between different types of meetings. Rather than throwing every possible conversation into one long staff meeting, tailor meetings to the content that needs to be discussed. Lencioni highlights four different types of meetings for different content: daily check-ins, weekly tactical meetings, monthly strategic meetings, and quarterly off-site reviews.

Lencioni and The Table Group offer a number of free resources to help you improve your executive team's meetings. To read more and to download tips and tools, visit the Death by Meeting resource page.

How to Support Effective Dynamics in Nonprofit Executive Teams

Q&A with Kirk Kramer & Peter Thies

Peter Thies has been honing his craft in organizational and leadership development for some 25 years, starting at Delta Consulting, then the preeminent firm for coaching CEOs. In 2013, he co-founded The River Group, whose staff of 11 are spread out among India, Abu Dhabi, New York, San Francisco, and its headquarters in Boston. "We help CEOs transform their companies by developing great organizations, great leaders, and aligned teams," Thies says.

In his experience, an organization's ability to manage change successfully depends, more than anything, on how well its executive team collaborates. "That's where we often focus our work," says Thies, whom Bridgespan Partner Kirk Kramer interviewed for this article. According to Thies, many organizations simply haven't delved into the fundamentals of team dynamics that lead to high performance. Here, he offers his advice on how to help executive teams optimize their time together.

Kirk Kramer: You've worked with dozens of executive teams. How many would you characterize as "high-performing?"

Peter Thies *is president and a partner of The River Group, where he helps CEOs transform their companies through developing leadership teams, improving organizational effectiveness, and strengthening organizational culture.*

Peter Thies: I'd say 10 percent at best. I actually think there's a greater percentage of high-performing teams beneath the executive level than at the executive level.

Kirk: That's interesting. What do you think accounts for this?

Peter: Lower-level program teams often have a clearer charter. They're running something together. They know what they're accountable for and explicitly share an understanding of how to do the work. The most common problem I hear from executive teams is, "Why do we exist? Are we here to report to the executive director?" That's not performing. That's meeting.

Kirk: What are the elements of a high-performing, executive team?

Peter: I think they share five traits. First, they have the right charter for their organizations. They're doing the right work at the right level for an executive team. Second, they share leadership roles, meaning they're not there to represent their function but to contribute to the executive team's charter, above and beyond their day job. We call them shared leadership roles or distributed leadership because different members lead different efforts within the team.

Third, they practice a culture of collaboration built on trust, versus competition for visibility or the CEO's attention. Each member is accountable for something, but all collaborate to deliver one another's output. Fourth, they have a good process for doing the work. When you get to executive teams, sometimes they think they're beyond process. But they're not. Finally, they "agree," even tacitly, to keep succession dynamics to a minimum. You can't completely eliminate it, but if everybody is constantly jockeying to become the next ED or CEO, they aren't going to be very effective.

Kirk: Let's go a little deeper on collaboration. Why does it matter so much?

Peter: Collaboration matters because executive teams ought to be making big decisions—a strategic shift, reorganization, acquisition, major expansion—and high-quality decisions require diversity of thought and opinion, as well as processing a lot of information. Without deep collaboration the loudest voice will win, or politics will prevail, or a micromanaging CEO or ED will stifle debate. The quality of your decision is going to be at risk.

Kirk: Why do teams struggle so much with collaboration?

Peter: I believe they struggle with striking a balance between being a good leader and being a good follower. That's why we spend so much time working with teams on collaboration. Consider: by the time I've earned my seat at the executive table, I've been rewarded for my leadership behavior, perhaps even for micromanagerial behavior. I may forget what it was like being a really good teammate and how to tamp down my inclination to simply take over stuff.

Another dynamic arises when a person believes they constantly have to come up with something cool or brilliant to prove their worth. This often happens when somebody is insecure to begin with, which a surprising percentage of executives are.

Kirk: What team dynamics best support a collaborative environment?

Peter: My colleagues and I have a formula that goes: "leading, facilitating, inquiry and advocacy, and participating equals strong collaborative culture." Team members should be good leaders and equally good followers. For example, let's say I'm in charge of talent development. As the

leader, I'll say, "Hey team, here's what we need to get better at reviewing the talent in our organization. On May 25, we're going to have a talent review session. Here's the prework that I think we should all do. I've talked with each of you about the talent in your division and suggest we use these tools to do the talent review. I think we're ready to go."

That would be me being a good leader among my peers because I'm accountable for one part of the team's work, which is to review talent.

A leader will be a good facilitator of the discussion, asking questions, not just dictating. As a leader, I'm keeping the team members engaged in the right way on that topic for which we all share responsibility.

My teammates, who are followers on the topic of talent development, are listening to their colleagues' viewpoints, inquiring about more information when they need it or when they see the conversation going awry, and advocating their own viewpoints in a way that generates collective insight that's better than anything any single individual could bring to the table.

Above all, being a good follower implies active participation and no "movie watching," as we call it.

Kirk: What do you mean by movie watching?

Peter: As an executive team member, you're not allowed to just sit and watch a conversation go down the tubes. You may be a "follower" in this part of the conversation, but you are accountable to your teammates. If there's a thought bubble in your head, whether it's an observation, a criticism, or whatever it might be, you're responsible for sharing it. Attendance, by itself, is not a contribution.

At the same time, the leader is responsible for moving the conversation toward a solution—and high-quality decision—by striking the balance between asking great questions and offering a point of view. (See the sidebar "Balancing Act.")

Kirk: Individual relationships play an important role in team dynamics, as well. How can executive team members strengthen those to collaborate effectively and meet their goals?

Peter: The number one improvement tool for team dynamics that we use is a coordinated series of one-on-one private discussions involving feedback to each other. This tool helps strengthen relationships, and build trust and candor at an individual level, that collectively boosts the team's capability. Over a 20-minute period, two team members ask each other two or three questions that explore how they work together. For example, "what things do we do well together?" "What is on your plate that might not be clear to me?" "What might we do together that can positively affect the team?" The answers to these questions can help enhance the time executives spend together tackling critical issues within the organization.

Kirk: Are there any final thoughts you'd like to share?

Peter: All of the suggestions in regard to charters, roles, dynamics, etc. can all be worked on—and are best addressed—in real meetings while working on real issues. Team development of this type does NOT involve trust falls, outdoor challenges, or games. Those are memorable and positive experiences, but they don't have the noticeable impact on functioning that many expect. The things we suggest in here directly intervene in the actual functioning of the team.

Balancing Act

Organizational change expert Peter Thies believes that balancing inquiry and advocacy is the most effective strategy for exceptional decision-making. "As an executive director, you should tell your team that asking probing questions is a great tool, and advocating a strong point of view is also a good tool," Peter says. "But if you only do one or the other, you're not giving yourself fully to the team."

Here is Peter's checklist for supporting collaborative decision making.

- **Appoint a facilitator** for each discussion who is responsible for questioning and testing for understanding, keeping the group on point, managing time, clarifying when it's decision time, summarizing key points and outcomes, and assigning follow-up. Don't assume it's the CEO or ED. Put a name on each agenda item.

- **Banish blame.** Replace frustration-based comments such as, "Hey, Kirk, this discussion's a waste of time and I blame you!" with, "Hey, folks I'm listening to what we're talking about here. I'm missing the value we're supposed to be providing on this. Does anyone else feel the same way? Are we on the right track or are we talking around something?"

- **Prevent advocacy pile-on** where everybody is just lobbing in their points of view and there's no way to synthesize or evaluate them side by side. Call "time out" and ask somebody to comment on a teammate's ideas.

- **Discourage taking sides.** When two members disagree on something, instead of saying, "I agree with Carole" or "I agree with Kirk," say, "Hey, Kirk, you just said something that's way different than what Carole just said. I think I know what Carole said, but I'm not sure with you. Can you tell us more about it, or does someone have an additional point of view about what Kirk said?"

- **Encourage positive energy but channel it.** The discussion leader or facilitator should ensure nobody dominates the conversation, which can lead to others tuning out. You owe it to your teammates to say, "Hey Carole, hold on a minute. We love your energy and enthusiasm, and we're getting there, but I think we're missing something. Kirk's been trying to get a word in."

- **Reward the team.** When a decision has been made or a next step determined, congratulate the group rather than an individual. It shouldn't be Carole's idea that won but the team's. Consider having somebody who wasn't a strong advocate summarize the key points.

How to Integrate Diversity, Equity, and Inclusion into Everyday Operations

By: Maria Hernandez

At the height of the #metoo debate in the nation's entertainment sector, actress Francis McDormand used her 2018 Academy Award acceptance speech to promote the "inclusion rider." It was a call to action for entertainers to insist in their contracts that studios hire diverse cast and crew. McDormand seized the moment to inspire a commitment to diversity, and she set an important example for leaders everywhere.[1] Business and community leaders alike can and should use their positions of power to set the standard for inclusion. This is especially true for the nonprofits that are providing an increasing share of the US safety net of services for the most marginalized members of society.[2]

But the cultural transformation necessary to address our nation's growing racial and ethnic anxiety, and the corresponding lack of equity, will happen only if new behaviors and organizational practices are "baked-in" to everyday operations in service delivery, management, and stakeholder engagement.

The Work of Inclusive Leadership Teams

Leaders committed to serving diverse communities effectively should prepare themselves to address three essential challenges:

- Creating a culture of inclusion with attention to key practices
- Setting clear expectations for inclusive leadership behaviors among all managers
- Aligning the mission of their organization to the broader equity issues being faced by the communities they serve

For each of these, leaders can implement operational strategies to foster new behaviors that over time will yield key results—sometimes even before staff fully align on the value of diversity or understand the business case for inclusion. Leaders who have studied peak performance psychology will recognize this as the proverbial "acting as if" mindset.[3] To be inclusive in the workplace, skip the polarizing rhetoric or endless debate and move forward with setting performance standards regarding inclusive behaviors. Then measure your progress over time by looking at key indicators of success such as

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retention and advancement of diverse staff, successful policies to serve communities, and improved program outcomes across diverse community members.

Creating a Culture of Inclusion

Executive teams committed to a culture of inclusion will support ongoing professional development so that middle managers, team leads, and staff are consistently developing skills linked to inclusion. While many organizations focus on unconscious bias awareness training, research indicates that awareness has a limited lasting impact—between several hours to several days.[4] Inclusive leaders instead look at work routines or processes to make inclusion an integral part of the way they work. This is perhaps most often seen in a review of how people source, recruit, onboard, or promote new hires. For example, many organizations are removing identifiers from resumes or making sure that diverse candidates are identified for all vacant positions, as well as conducting audits of their communications to ensure their values around diversity and inclusion are consistently expressed.

Employees also take cues about inclusive behaviors by the way they are treated during their workday. For example, setting the tone in meetings to engage participants with different communication styles— cultural, linguistic, or introverts/extroverts— allows everyone to be heard. One strategy for team meetings or community forums is to appoint an "inclusion advocate"—the person with permission to note if a person's comment has been ignored or to make sure anyone dialed in for the call is given time to speak. At the end of the meeting, inclusive leaders ask, "Did everyone who wanted to speak get heard?" This isn't to be confused for a quest for consensus. It's

about distributing the power to be heard among all participants.

It's also human nature to gravitate towards others like ourselves. To account for this, executive teams can tune in to team dynamics and identify the "in-groups" that form around any number of issues— tenure, gender, or even alumni networks— and rotate team assignments or distribute responsibility for key tasks to ensure everyone has opportunities for growth.

Setting Clear Expectations

Any effort to build or sustain an inclusive culture must be linked to clear accountability for inclusion. Over the past five years, InclusionINC has trained more than two thousand senior executives about inclusive leadership, using a definition of an inclusive leader as one who seeks out and integrates the voices of key stakeholders to drive key organizational results. Our research shows three key—and measurable— statements about leaders that are most often associated with inclusive workplaces:[5]

- My manager asks my opinion about the work I do

- My manager acknowledges my contributions

- My manager demonstrates concern about my success

To determine if leaders are demonstrating these behaviors, conduct 360 evaluations, provide ongoing professional development, and integrate learning opportunities at all levels of the organization. It's equally important to reward these behaviors. Some organizations link a leader's performance raises or bonuses to high employee engagement scores—one of the most correlated indicators of inclusion and psychological safety among employees.[6][7][8]

The Inclusion Playbook for Nonprofit Leaders

Build Your Personal Competencies for Inclusive Leadership

• Seek out cross-cultural experiences that encourage awareness of other cultures or spend a day in the life of the community members you serve

• Make the time commitment needed to build key skills—empathy, active listening, appreciative inquiry

• Get feedback on your effectiveness as a leader from diverse stakeholders

Train for Key Behaviors and Hold Leaders at All Levels Accountable for Inclusive Leadership

• Engage managers in meaningful opportunities to understand and learn about Inclusive Leadership

• Provide opportunities for managers and team leads to explore best practices for creating an inclusive workplace culture

• Use a performance evaluation tool that features inclusion as a valued skill to demonstrate in the organization

• Reward inclusive leaders for their efforts and role modeling of key values and behaviors

Align Your Mission to Address the Equity Issues in the Communities You Serve

• Review your services, outreach, or programs through the lens of inclusion to carry out your mission in culturally relevant ways and advance equity

• Measure your program impact and success across diverse populations to create targeted improvements

• Engage clients, partner agencies, civic leaders, and donors in an annual inclusion summit to bring emerging community perspectives into your services and programs

Set Milestones and Track Your Progress

• Track the hiring, retention, and advancement of diverse staff at all levels to ensure standards of equal opportunity are being followed

• Measure employee engagement by ethnicity, gender, generation, or tenure with the organization to track diverse staff experiences of your workplace culture

• Review the impact and effectiveness of your organization's services across diverse constituents to track equal outcomes

Aligning the Mission to Advance Equity

In serving the needs of community members, inclusive executive teams will measure the extent to which services and programs achieve their intended objectives among all members of the community. In the United States, we have taken refuge in the idea that equal treatment yields equal outcomes. That notion would be true only if everyone lived in or started under the same conditions—which they don't.
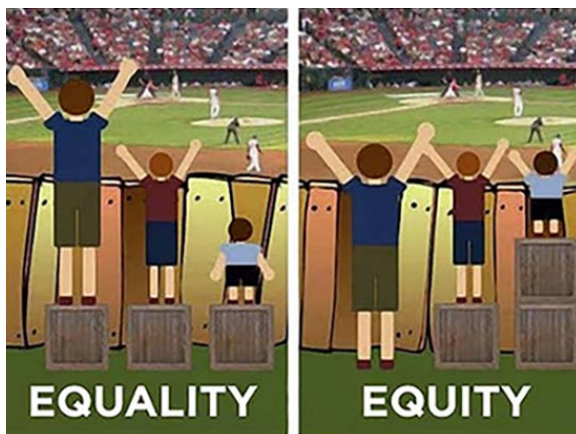
Original image by Craig Froehle, PhD

To ensure program success across diverse populations, organizations must abandon a "one-size-fits-all" mindset and tailor services to community members' unique conditions and cultural factors. For example, Adventist Health White Memorial Hospital is serving Latino patients with prediabetes by modifying a Diabetes Prevention Program (DPP) provided by the YMCA. A typical DPP program would encourage a range of lifestyle changes that includes a diet of vegetables and lean proteins plus exercise to achieve a healthy weight. Adventist Health created a Center for Hispanic Health[9] and partnered with the YMCA in Los Angeles to customize its approach to Latino patients. It's DPP sessions for Latino families include cooking classes, showing how to prepare traditional Latino cuisine with less saturated fats, and encouraging exercise—dancing versus the treadmill, as something the whole family can enjoy. In doing so, the hospital and the YMCA are taking note of the collectivist culture of Latinos, where lifestyle changes happen as a family decision and traditional foods are an integral part of family time.

Being an inclusive individual leader–and an inclusive executive team–requires building an adaptive playbook for equity and the support of the board of trustees. (See "The Inclusion Playbook for Nonprofit Leaders" sidebar above.) It also requires a commitment to the resources needed to run a marathon not a sprint. As a nonprofit leader, your #inclusionrider will set the stage for transformative change that is long overdue and needed now more than ever.

Notes

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