The Bridgespan Group
Collaborating to accelerate social impact

Executive Team Effectiveness Toolkit

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Executive Team Effectiveness Toolkit: Introduction

Welcome to Bridgespan's Executive Team Effectiveness Toolkit! Through our research and experience working with nonprofits for nearly 20 years, we distilled a sequence of five steps, framed as questions, that have helped many executive teams increase their overall effectiveness—moving from good to great.

The purpose of this toolkit is to help you and your team improve your effectiveness in one or more of these five areas. If you have not done so already, we recommend you and your team start by reading this article on executive team effectiveness and **taking our 5-10 minute diagnostic survey on executive team effectiveness**. Once you and your team members have taken the diagnostic, you will receive a summary report that can help you determine which of these five areas is in most need of improvement.

For each of the five areas the toolkit contains:

- **Introductory information** about the challenges to address in each area
- **An easy-to-use tool** to improve effectiveness for each area:
  - CEO checklist for leading executive teams
  - An interdependence/stakes matrix that helps identify the work of the executive team
  - Executive team composition questions
  - Meeting agenda template
  - Examples of effective executive team behaviors
- **Process steps** for how to use the recommended tool (where applicable)
- **An example of a tool-in-action** from another nonprofit executive team (where applicable)
- **Peer perspectives** from other nonprofit leaders with advice related to the overall topic and/or how they have used a specific tool

We know from experience with clients that applying these easy-to-use tools will help improve the effectiveness of your executive team. As you use them, we would appreciate any feedback you have for improvement. You can provide feedback and also find these resources online at www.bridgespan.org/special-collections/executive-team-effectiveness-toolkit.

If you are interested in doing this work to maximize your executive team effectiveness with support from Bridgespan, please email us at LeadershipAccelerator@bridgespan.org. In particular, if you would like to work on most or all of the five areas within the toolkit, we recommend this additional support.

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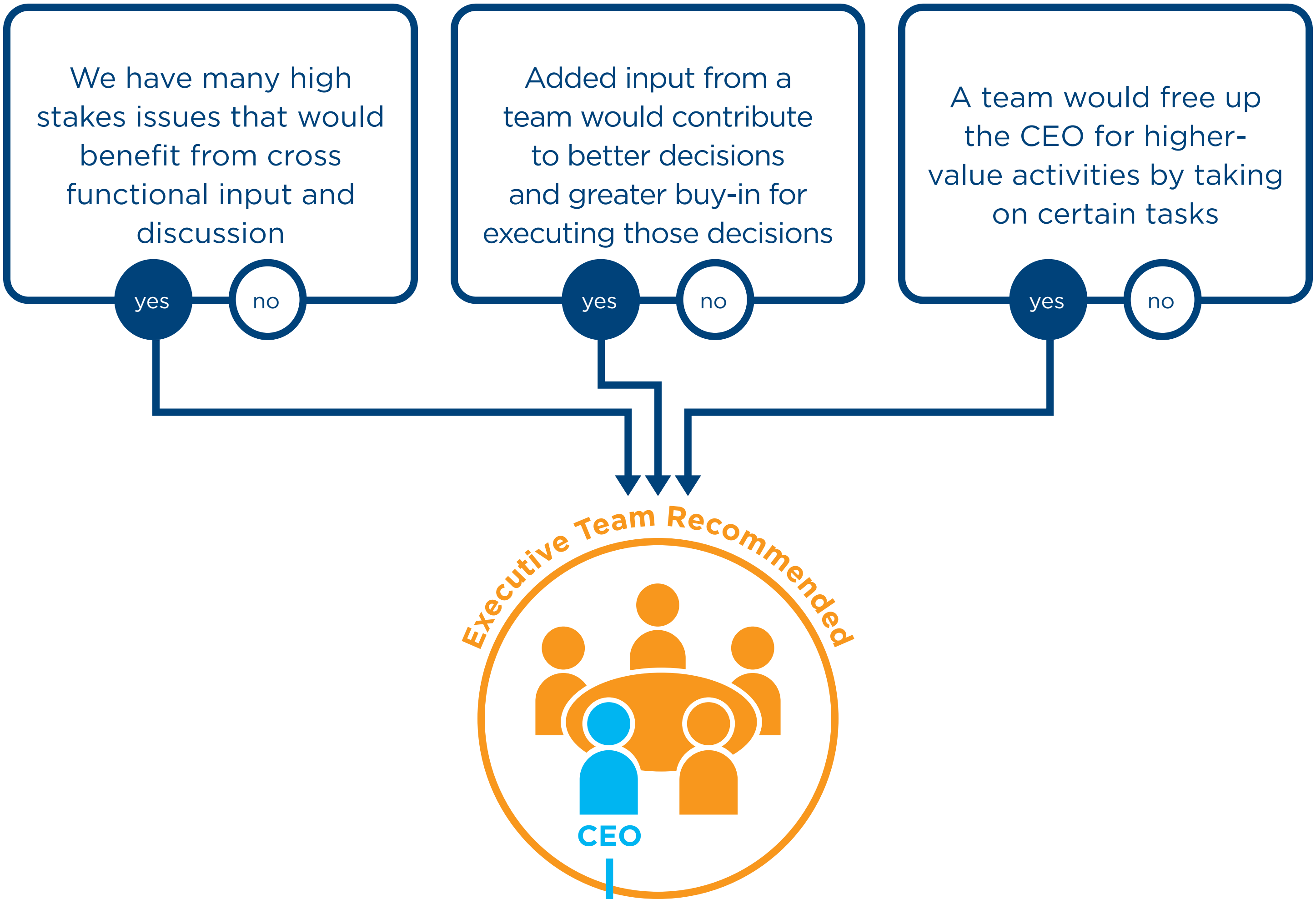
CEO Management of the Executive Team

Not all organizations need a group of senior leaders to come together to collaborate on leading the organization. It is the responsibility of the CEO to determine whether or not an executive team is needed, and, if it is, to form the team that is best suited to the organization's needs.

Is an executive team needed?



- Take responsibility for leading your team
- Proactively manage your team's work
- **Use the CEO checklist on the next page** to guide you in leading your executive team

CEO Checklist for Managing Executive Teams

In our research, every high performing team we identified was led by a CEO who intentionally managed the team. This checklist highlights a number of steps CEOs can take to more effectively lead their executive teams. Use it to assess your approach to executive team management and where it might need improvement.

1. Leading the team and individuals

Managing the team

- ☐ I have defined (or worked with my team to define) and communicated the work of the team.
- ☐ I have determined who should be on the team and if two teams are needed.[1]
- ☐ I maintain ownership over the team meeting agendas and process.

Leading the team

- ☐ I have communicated my decision-making style and preferences to the team.
- ☐ I am clear with my expectations of what I want from the team (making a decision, providing input, etc.).
- ☐ I demonstrate desired behaviors (lead by example).
- ☐ I reward (address) appropriate (inappropriate) team behaviors.
- ☐ I reward (address) appropriate (inappropriate) individual behaviors.
- ☐ I draw out and amplify diverse and underrepresented points of view.
- ☐ I consider differential impacts of decisions on people of color.
- ☐ I understand and self-correct my unconscious biases.

Developing the team and individuals

- ☐ I have identified competencies that individual team members need to develop and have developed a plan with each individual to help them improve.
- ☐ I incorporate feedback for individuals about their team performance in their annual reviews.
- ☐ I manage out team detractors that don't improve with feedback.

2. Delegating, but not abdicating, some team management tasks

- ☐ I have clearly communicated responsibilities and expectations to any deputy (e.g., COO, chief of staff, or strong executive assistant) I have to manage some team processes (e.g., meeting follow up).
- ☐ I have clearly communicated responsibilities and expectations to any specific leaders to whom I have delegated to lead certain topics.

3. Strengthening your capabilities

- ☐ I have identified ways in which I need to strengthen my capabilities to lead the team.
- ☐ I have identified ways I can get help (e.g., other CEOs, board members, coaches, team members, etc.).

1 Many larger nonprofits have two leadership teams. See team composition guidance, beginning on page 14.

CEO Team Management: Peer Perspectives

It's important for any nonprofit CEO to maximize executive team effectiveness in service of the organization's impact. Yet, inspiring high performance of the executive team isn't easy. We spoke to three CEOs: Kirstin Chernawsky of Erie Neighborhood House, Eric Robbins of the Jewish Federation of Greater Atlanta, and Dorri McWhorter of YWCA Metropolitan Chicago, to learn how they approach leading their teams and which efforts have been particularly powerful.

Why did you take action to improve your team's effectiveness?

"We started on a project to improve our effectiveness when I was a year into my tenure as executive director," said Erie Neighborhood House's Chernawsky. "I inherited our leadership team—not just the employees but also the team's culture and way of doing things—from the former ED, and there hadn't been an opportunity for us as a new group to shape our norms and expectations. We had also realized that we did not have a common understanding of the role of the leadership team within our agency or what that meant for each of us individually. So, for both of those reasons, I saw a need to do that work with the team so that we could hold one another accountable. Ultimately, codifying the work of our team, meeting and communication processes, and expected team behaviors really created a common language, which is incredibly important when you think about the challenges and nuance that can come with communication, period."

How do you define your role in the context of the team's work?

"When a big decision comes up, we identify whether I am the decision maker, if it is someone else on the leadership team, or if it is the leadership team as a whole who is the ultimate decider," Chernawsky said. "If it's the latter, we also decide how the decision will be made. Does it have to be consensus? Does it have to be a majority vote? If it is a majority vote, I get one vote like everyone else," she added. "If I am in the dissenting minority, I commit to upholding the decision made by our team. This is one of our agreed-upon behavioral norms, and I think that is really powerful. It also means that when I do say that I need to be the final decision maker on something, the team respects and appreciates that."

How do you delegate, but not abdicate, some team management tasks?

Executive team leaders inevitably have long to-do lists, limited time, and pressing priorities outside of their work as part of the executive team. Yet they may feel compelled to take on tasks that might be better supported by others. To alleviate the pressure of "taking it all on," Robbins of the Jewish Federation of Greater Atlanta enlists the help of his chief of staff to draft agendas and do follow up on critical decisions that need to be made. "Our chief of staff compiles suggested agenda items submitted by team members, we discuss them, and I decide if they all belong on the final meeting agenda and what specific amount of time is needed for those items," Robbins said. "Our chief of staff also tracks and records follow-up items during meetings and sends reminders to ensure that everyone who said they would do something at a previous meeting actually completes their tasks. We then start our next meeting by asking about where we are with those items."

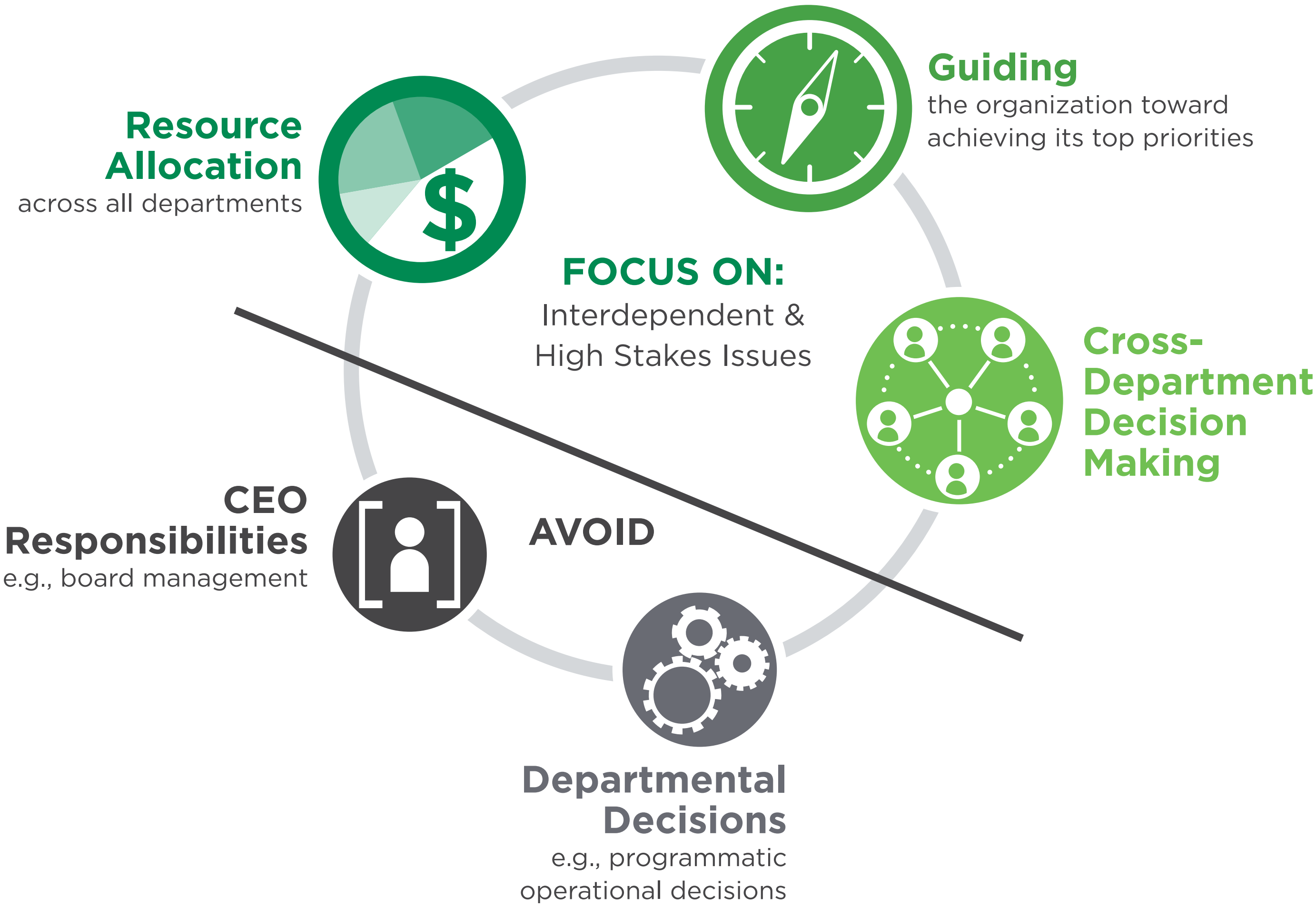
How have you identified and met the needs of your team?

"Doing this work to develop these executive team tools has helped me better understand what the team needs from me, and structure is one of those things," said McWhorter, the CEO of YWCA Metropolitan Chicago. "These tools have created structure for our meetings, organizational priorities, the work of our team, and behavioral norms. We developed templates in all of these areas, and our executive team members are already using these with their own teams. We're also developing another template to document and track follow-up items. As a result, we are now more focused in how we work together."

Work of the Executive Team

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 to determine who should participate and how the team should conduct its business.

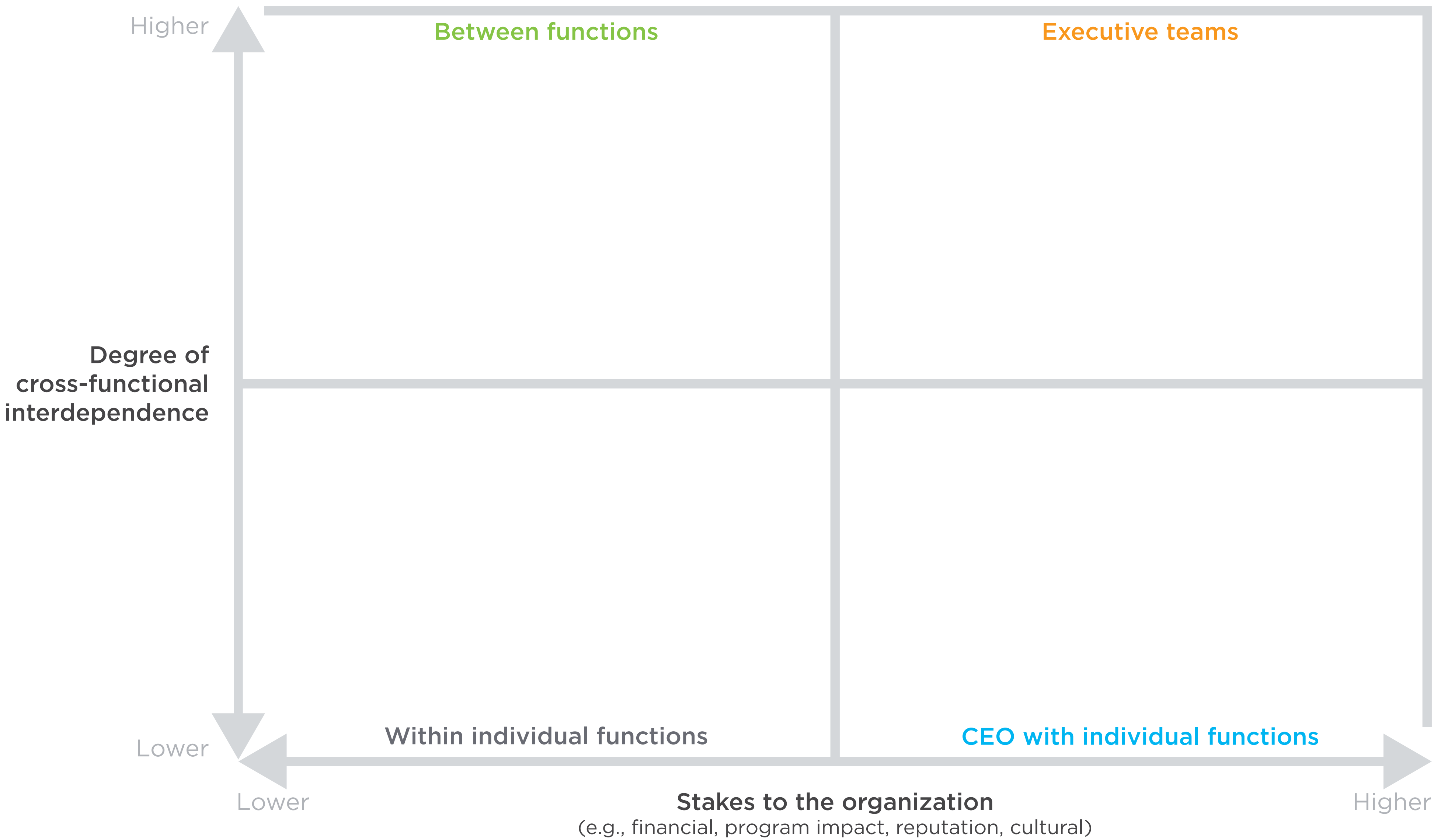


Definitions

- **Interdependent Issues:** Those involving multiple units or functions where cross-leader discussion is critical for effective decision making.
- **High Stakes Issues:** 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.

Identifying the Work: Interdependence/Stakes Matrix

The Interdependence/Stakes Matrix helps executive teams determine their priority activities and decisions. The following tool and step-by-step instructions will help you apply it to your executive team's work.



Interdependence/Stakes Matrix Tool: Instructions

1. **Clarify your organizational priorities for the next 12-24 months**
   - Summarize priorities, pulling from existing documents, such as strategic plans, and align as a team around these priorities.
   - Identify other potential areas where the CEO wants team support, including processes to lead the organization, such as budgeting and resource allocation.

2. **Determine what priorities are the most interdependent**
   - Identify priorities with the highest interdependence—those involving multiple units or functions where cross-leader discussion is critical for effective decision making.

3. **Determine what priorities have the highest stakes to the organization**
   - Identify priorities with the highest stakes—those having the most impact on the organization's strategic clarity, programmatic and organizational effectiveness, development of future leaders, external reputation, and financial sustainability.

4. **Plot each priority on the Interdependence/Stakes Matrix**
   - Identify those priorities that have both high interdependence and high stakes—those in the upper right-hand quadrant of the matrix; identifying priorities should be the collective work of the executive team.

5. **Determine the executive team's role for each area of work**
   - Discuss the executive team's role (e.g., providing input, making a recommendation to the CEO, deciding); these are likely to differ by priority, so it is important to clarify what role the team is playing to optimize the team's time together.

Interdependence/Stakes Matrix: Client Example

Degree of cross-functional interdependence (vertical axis: Lower → Higher)

Stakes to the organization (horizontal axis: Lower → Higher)
(e.g., financial, program impact, reputation, cultural)

Between functions

- Launch telehealth and online health services ✓
- Improve financial reporting, analysis, and monitoring
- Build programmatic on/off ramps and financial modeling
- Launch STI Big Bet
- Parental Leave Policy
- Health, Equity, and Impact Department build-out
- Legislative Advancement

Executive teams

- Launch UP Big Bet ✓
- Achieve full accreditation status ✓
- Contingency planning: regs., access and funding
- Footprint expansion
- Improve staff diversity, equity, and inclusion
- Improve staff engagement and satisfaction
- Identify and train emerging leaders
- Improve productivity and performance of SLT
- Increase board diversity and identify next generation of leaders

Within individual functions

- Launch transportation pilot project ✓
- Increase volunteer engagement
- Increase public policy presence
- Launch Employee Advisory Committee
- Comprehensive campaign feasibility study
- Improve patient care and satisfaction
- BoardEffect Portal launch ✓
- Revitalize sexual education and prevention programming
- Education Department build-out

CEO with individual functions

- Focus on elections! ✓
- Purchase and build out new facility ✓
- Monitor national transformations and opportunities

*This chart will be updated quarterly by SLT[1] at in-house Leading for Impact working sessions.

1 This healthcare organization refers to their executive team as their Senior Leadership Team (SLT).

✓ = competed items

Work of the Executive Team: Peer Perspectives

Without clarity around the work they must do, many executive teams fall into a cycle of unproductive meetings and feelings of dissatisfaction with the impact they're having on their organizations. One tool, the interdependence/stakes matrix, can help teams avoid these. (See page 7 for the Interdependence/Stakes Matrix tool.) Here several CEOs and a chief of staff describe how they've used the tool and how it's benefited the work of their executive teams. (See page 11 for an example of a completed matrix.)

How did you use the tool to identify the work of the executive team?

One CEO of a healthcare organization used the tool to measure a priority's relevance to the whole team. "The value of the tool is a five out of five," she reflected. "By placing priorities in each quadrant, we determined if it was something for all of us to talk about as a team or only some of us to talk about." Her chief of staff added, "We asked ourselves, 'Where do we have department crossover, versus where do we actually need the entire senior leadership team to work on this?' We learned the idea of shared responsibility—and if the full team does not have shared responsibility for an item, it does not belong in the top right quadrant," he said. "Deciding what is in each quadrant is something that has to be done with the entire group present. Having all of those voices in one place was so valuable."

Also critical is agreement on the number of priorities: the matrix is a visual way to quickly assess if you're taking on too little, or too much. "In getting to a manageably sized list of priorities owned by the executive team," noted Eric Robbins, CEO of the Jewish Federation of Greater Atlanta, "the team had to have the discipline to sit down and say, 'We can't accomplish everything, so what are the most important things for us to do? What are the priorities?' If you have too many priorities, they all lose something."

What have been the benefits of using the tool?

For the chief of staff of the healthcare organization, using the tool had multiple benefits. “This process helped us streamline our priorities, identifying if something fit squarely in a particular department, or if it was shared across departments,” he said. “If it was shared, one of the biggest things that came out of this for us was getting more clarity on the amount of time required by us together as an executive team for that priority. This exercise gave us greater clarity, even on team members’ individual roles. When it’s a priority that is a shared space amongst the whole executive team, that’s the most difficult—figuring out who’s in the driver’s seat. This process helped us answer, ‘What is my responsibility within a given project or task?’ Finally, something that has been a huge-value add for us is having universal language about our work as a team. This has been very useful for onboarding new hires, too. We have a guidepost.”

Dorri McWhorter, CEO of YWCA Metropolitan Chicago, highlighted additional benefits. “The exercise gave us a structure and purpose for being together, which made us more effective. We also realized through this process that our work to refine our theory of change is something that the entire executive team should own. Before, we assigned that as a responsibility to one individual. In using the matrix tool, we realized that this should be a shared responsibility because everything else in our work flows from this.”

How have you managed the work of the team on an ongoing basis?

“One of the challenges we had was that we would say, ‘Oh, this could be four people’s responsibility to achieve this particular priority.’ But we realized that having multiple individuals responsible like that means that no one is truly accountable,” McWhorter said. “We had to overcome this and get comfortable with assigning one point person who will really drive a priority forward for us and be the point person for how and when the ET should engage.”

Besides accountability, it’s also important to review whether the priorities you originally set are still relevant. “Instead of this being a standalone document that you do once, every year we revisit the priorities and make sure they are updated,” Robbins of the Jewish Federation of Greater Atlanta said. “I also make sure that what I am accountable for to our board speaks directly to this list.”

The chief of staff of the healthcare organization said his executive team pulls up to review its work quarterly. “We have quarterly half-day sessions, and one of the guaranteed agenda items at these meetings is looking at our matrix to say, what got completed? What can we put a check mark by and feel good about? Also, is there anything that needs to shift or change? At our next quarterly meeting, we’re also going to flesh out the responsibilities of the individuals who have been named as primary and secondary leads on different executive team priorities.”

Executive Team Composition

Determining who is on the executive team is critical. Including all the right perspectives can sometimes be at odds with keeping the team a manageable size. CEOs who rate their teams as highly effective balance two critical questions:

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

- Representation from critical vantage points
- Relevant demographic diversity
- Agency-wide knowledge and thinking

Is the team a manageable size?

- 4-6 is optimal for:
  - Shared ownership
  - Interpersonal communication
  - Debate/discussion
- If 8+, consider smaller executive team and larger management team focused on different work

Finding this balance may not result in a group composed of the CEO's direct reports, e.g.

- You may want fewer members if the CEO has a large number of direct reports.
- You may want to augment the team with other members if certain critical perspectives are missing.

Use the questions on the next page to reflect on your executive team composition.

Key Questions for Reflection About Executive Team Composition

Answer the following questions to determine if you have the right people on your executive team.

1. Optimizing Team Composition

A. Is our team a manageable size with the right perspectives?	YES	NO
• Is the executive team a manageable size? – 4-6 enables better discussion, ownership, and decision making • Do we have the perspectives to do our work? – E.g., organization-wide roles, demographic diversity, etc. (to surface more perspectives)		
B. Does our team have the competencies required to do the work?	YES	NO
• If not, can we develop them, or do we need to add to the team?		
C. Does our team get outside input when needed?	YES	NO
• If not, how can we get input from subject matter experts or other key stakeholders not in the room?		

2. Considering Two Top Teams

A. Is our executive team too large to be effective (8+ people)?	YES	NO
• If yes, see next question		
B. Should we consider two management teams?	YES	NO
• A smaller executive team, focused on strategic decisions and resource allocation • A larger management team, focused on cross-organizational operations coordination, sharing staff input, and communicating across the organization		
C. If we have two teams, have we clearly defined the areas of work for each team?	YES	NO

3. Evolving Team Composition

A. Do I need to make changes in the composition of the executive team to better align the team to the work we need to do?	YES	NO
• If so, can I take advantage of known turnover (e.g., CEO transition or natural attrition) or major strategic pivots (e.g., new strategic plan)?		

Executive Team Composition: Peer Perspectives

Most nonprofit executive teams we've worked with have between four and six members. However, some CEOs prefer larger teams as a means to ensure the right perspectives are brought to bear for critical decisions. Other CEOs opt to balance the trade-offs inherent with larger teams and decision-making complexity and the desire for more perspectives by creating both a smaller executive team and a larger management team.

The nonprofit leaders interviewed here share how they approached forming their executive teams and, in some cases, broader leadership teams, around the critical work they needed to do.

How do you ensure that team composition reflects your work?

"Team composition is really driven by what we want to accomplish," said CEO Dorri McWhorter of YWCA Metropolitan Chicago. "Our [executive] team is larger than others because we have four programmatic team members who are critical for driving our different business lines, and we have included all of them at the table rather than having one programmatic role."

How do you approach strengthening or making changes to your executive team?

"It's important to have the ability to step back and really look at the team composition to see if you have 95 percent of the capabilities you need covered," McWhorter said. "[YWCA Metropolitan Chicago] did this, and we definitely identified some gaps on our team. I'm willing to live with gaps as long as they are not permanent—if there are opportunities for team members to learn and grow to fill the gaps. In the meantime, we can backfill these needs with consultants and continue to assess where we are in the skill-building process."

Kirstin Chernawsky, executive director of Erie Neighborhood House, also offered advice about making changes to the team: "Most people, myself included, wait too long to makes changes in the team composition, because we don't want to hurt people's feelings. Then, after the change happens, you wish you had done this months before. More generally, you need a clear understanding of the roles, responsibilities, priorities, and norms of the executive and leadership teams. If you have those clear metrics, it's easier to look at your composition holistically and see what might not fit anymore, what might be askew, or where there may be a gap. If you don't have those things spelled out, it can be harder to see."

Some organizations have an executive team and a leadership team. How do you describe the role of each?

"The executive team is a safe space to bounce ideas off of one another and develop recommendations that we bring to the broader leadership team,"[1] said Chernawsky of Erie Neighborhood House. "We have also used it as a supportive space for problem-solving and addressing challenges that we are having or for discussing confidential topics that are not ready to be shared with the rest of management yet.

"We all work together during the broader leadership team meetings. It's important that the leadership team is its own entity—not just having the executive team attend a directors' meeting. I think this has enabled directors to function more like senior directors, and it has enabled senior directors to have a greater appreciation for the directors' perspectives and proximity to front-line staff and participants. So it has helped not only to provide professional development opportunities but also to keep front-line staff and participants at the forefront of our minds."

The Jewish Federation of Greater Atlanta also has two teams: a small executive team comprising C-level team members, and a broader leadership team at the vice president-level and above.[2] "The different perspectives that nonexecutive team members bring to [the broader leadership team] are really helpful," CEO Eric Robbins said. "They bring creativity, technical and for-profit sector experience, and significant tenure in the field. There's something to be said about the variety of perspectives that makes this group's meetings fruitful.

"I bring more sensitive topics to the executive team and topics that just would not be as productive to discuss in a larger group, like staff salaries, promotions, and our organizational chart, to think them through on a broader level," Robbins explained. "I like having the larger team, with tentacles into all parts of the organization but having the luxury of a smaller team when I need it."

1 Erie Neighborhood House's broader leadership team consists of the executive team (the executive director, senior director of Development and Communications, senior director of Operations, senior director of Programs & Quality Assurance, and senior director of Finance) in addition to the director of Human Resources; director of Community Resources & Education Programs; director of Child Care; director of Expanded Learning Programs for Children & Youth; director of Citizenship, Immigration, & Health; director of Facilities, and director of IT.

2 The Jewish Federation of Greater Atlanta's executive team consists of the CEO, chief financial and administrative officer, chief impact officer, and chief philanthropy officer; their broader leadership team includes these individuals in addition to the vice president of Community Planning and Impact, the vice president of Donor Services, the vice president of Innovation, the vice president of Major Gifts, and the vice president of Marketing.

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Effective Executive Team Meetings

Well-managed meeting and internal communications processes are essential for a successful executive team. You can improve your meeting effectiveness through the following four steps, beginning with proactive preparation.

PREPARE
for the meeting

- [ ] Create a written agenda
- [ ] Double check to ensure the right things are on the agenda
- [ ] Read materials in advance

Use the agenda template on the next page to get started!

LEAD
the meeting

COMMUNICATE
after the meeting

EVALUATE
meeting effectiveness

Executive Team Meeting Agenda Template

Use this template to build an agenda for your next executive team meeting. The steps on the next page can help you hold effective meetings using this template as a guide.

Date: Meeting type:

TOPIC	PURPOSE	LEADER	PREPARATION	TIME
Frame as a question	E.g., decision, discussion, learning	Name of topic owner who will facilitate discussion	Pre-reads or other preparation expected of participants	Duration

Wrap up:
What decisions did we make today?

What actions do we need to take? Who is responsible? By when?

What do we need to communicate? To whom? By when?

Agenda Template: Instructions

1 Prepare for the meeting

- Identify agenda items
  - Seek input from the team, but the CEO finalizes agenda, focusing on items aligned with the work of the team (e.g., high stakes/interdependence)
  - Cancel the meeting if there are no critical agenda items
- Develop a written agenda
  - Pose each agenda item as a question to make clear the purpose of the discussion (i.e., are you deciding, providing input, learning, or aligning on messaging?)
  - For each topic, clarify who will lead it, what preparation is needed, and how long the discussion will be
  - Assign meeting management roles (e.g., facilitator, recorder, timekeeper)
- Share agenda and materials in advance
  - Set a norm for how far in advance the agenda will be sent out
  - Clarify what preparation is expected and hold members accountable for doing it

2 Lead the meeting

- Begin meeting by reviewing agenda and roles
  - Review any follow-up action items from previous meetings
- Stay on track during meetings
  - Have a timekeeper for each agenda item and keep a “parking lot” of items to come back to at a later time
  - Make the agenda visible in meetings to keep everyone aware of the schedule
- Decide how to address new “urgent” items surfaced during meeting (CEO is decision maker)
  - Hold until the next meeting
  - Change the agenda
  - Cover with specific individuals outside of team meeting

3 Determine how to follow up after the meeting

- Leave time at the end of every meeting for a wrap-up, even if it means postponing some agenda items
- Wrap-up meetings by recording decisions, actions, and communication required
- Circulate decisions, actions, and necessary communications to all participants quickly after meeting
  - Hold the team accountable for executing follow-up actions
  - Keep an ongoing record for future meetings

What decisions did we make today?

What actions do we need to take? Who is responsible? By when?

What do we need to communicate? To whom? By when?

4 Evaluate meeting effectiveness (e.g. every three months)

- Review past agenda items and wrap-up documentation
  - Ensure the team is focused on the “right work” (modify the list of work as appropriate)
  - Ensure processes for setting agendas, managing meetings, and follow-ups are observed and effective

Agenda Template: Client Example

Senior Leadership Team[1] Meeting

August 19, 2019 - Monthly Meeting Agenda

Facilitator: Emmanuel

Timer: Louise

Topic/Item	Owner	Time (min)	Role of Team	Prework
Follow-Up Items				
Credit Card Policy	James	-	Share and update	See written updates template[2]
Draft Accounts Payable Policy	James	-	Share and update	
RSM Annual Audit Fieldwork	James	-	Share and update	
New Items				
2019 Employee Engagement Survey Results Overview	Maria + OD Team	40 minutes	Share and update	None
SLT Shared Administrative Assistant	Maria	10 minutes	Discussion	None
Contract Management Policy	Anne	10 minutes	Review and discuss	Read policy and authorization document
Strategic Plan Updates	Jennifer	15 minutes	Discussion	Review new one-page overview document
Virtual Town Hall Preparation	Louise	10 minutes	Discussion: timing & call for proposed discussion topics	None
Next Steps/Action Items/ Assignments	Emmanuel	5 minutes	Confirm the plan	None

1 This healthcare organization refers to its executive team as its senior leadership team (SLT). The follow-up items aren't discussed during the meeting. They are included in a written update, which the CEO expects everyone to read before the meeting.

2 See an example of the written updates template in Bridgespan's Executive Team Toolkit online at www.bridgespan.org/special-collections/executive-team-effectiveness-toolkit.

Effective Executive Team Meetings: Peer Perspectives

If your executive team suffers from unproductive meetings, it could be that you don't have a good agenda-setting process. Many executive teams have used the agenda template tool presented in this toolkit to help them achieve more effective meetings and communication processes. Here, the chief of staff of a healthcare organization and CEOs Dorri McWhorter of YWCA Metropolitan Chicago, Eric Robbins of the Jewish Federation of Greater Atlanta, and Kirstin Chernawsky of Erie Neighborhood House share their approaches to making their meetings and communications more effective.

How does the executive team prepare for its meetings?

"Before, we had a standard agenda that just listed topics, without information about the time required for discussion or who would lead the conversation. Team members would submit topics to the CEO and myself, and we would build the agenda," said the chief of staff of a healthcare organization. "Now, we rotate who facilitates each meeting. The facilitator asks the team for agenda items a week before the meeting and puts the agenda together based on the template we have created. Sometimes we don't have enough time to cover all of the submitted topics, so it's the facilitator's job to decide what the team will discuss and what should be shared as a written update. The facilitator goes back to the list of executive team priorities that we've created and says, is this something that falls in the executive team quadrant? (See "Work of the Executive Team" on page 8.) If it isn't, then it's probably an item that either doesn't go on the agenda at all or becomes a written update.[1] All written updates go into a shared pre-read folder for the meeting, and everyone is required to review this.

"The agenda template also clearly identifies the role of the team. 'Is this a decision? A discussion? Are we reviewing a document? Is this a brainstorm?', he added. "Each team member is going in our own directions during the day, but this helps clearly set the tone for the meeting and each topic."

CEO McWhorter and her team create their meeting agendas via a shared Google document. "Team members add their suggested topics with their names by them, and I go in and decide whether or not to make it part of our official agenda," McWhorter said. "There's also a notes column, and if I don't select a topic for our agenda, I can say in the notes section whether we should cover this in another meeting, like our program leadership caucus."

"Using this Google spreadsheet has created a much more transparent agenda-setting process, because team members can see each other's input on the agenda. Before, there was no transparency around other proposed topics: things went to me in a vacuum," she added. "Now, if I don't select someone's topic, they can at least see the selected items that have greater urgency or importance."

1 See an example of the written updates template in Bridgespan's Executive Team Effectiveness Toolkit online at www.bridgespan.org/special-collections/executive-team-effectiveness-tool-kit.

How do you approach meeting facilitation and keeping meetings on track?

"We identify someone to play the role of timekeeper at our meetings," the chief of staff of a healthcare organization said. "At first, the timekeepers asked, 'How can we keep the group on time and be polite? We don't want to cut people off.' But we realized that respect goes two ways—if we ask for a 90-minute meeting, it should be a 90-minute meeting. So now, we set a timer for an agenda topic's assigned time. Once it's up, we move to the next topic."

As noted above, the healthcare organization's executive team members take turns facilitating meetings. "This process ensures that none of this is a burden on one person," reflected the chief of staff. "This has created an opportunity for shared management of this team, as opposed to a top-down approach. It has also helped us naturally adopt similar facilitation norms, because we are watching each other lead these sessions. There has been a lot of value in this."

Erie Neighborhood House also rotates meeting facilitators. Reflecting on the benefits of this approach, Executive Director Chernawsky said, "Rotating meeting facilitators can create professional development opportunities for team members. The variety helps address different learning styles on the team, and rotation also creates buy-in for our meetings and increased understanding of behind-the-scenes work that goes into our sessions together."

What have been the benefits of using this agenda-setting process and new agenda template?

"It's so simple, but it is a huge value add," noted the healthcare organization's chief of staff. "Building an agenda like this requires intentional thought about what should actually make it onto the agenda, and what information people should know before going into the meeting to enable a productive conversation. We live in a culture where we often assume that everything will happen in the meeting—but things have to happen before you walk in the room. We're trying to roll this out agency-wide, for both internal and external meetings, simply because we have seen how much value it has added for our executive team meetings. Now that we set time limits for items, we actually get through them faster. We learned about the value of shared time, and are utilizing this more effectively."

Being this thoughtful, however, does take time. "Our agenda creation process is now more time consuming, but at the end of the day it's well worth the additional time," McWhorter said. "This process ensures that things aren't falling through the cracks and that we're spending time on the right things. Big picture, we are all working so much better together. We are more effective and enjoy the work more. Now, we don't do updates for the sake of updates, and we don't waste our time on having unnecessary conversations. We are much more focused and highly disciplined in our discussions, because we realize that we need to be—our time together is so valuable."

How do you wrap up your meetings and ensure accountability for identified next steps?

"Our last agenda item is wrap-up and next steps," the chief of staff said. "The team confirms the plan, then the meeting's facilitator sends a follow-up email after the meeting to confirm what was discussed and individuals' roles. The facilitator is also responsible for getting updates from team members on the items they are responsible for.

"The beginning of the next meeting always focuses on those follow-up items—'Hey, these were the 3-5 things that came out of the last meeting that we wanted to make sure were complete by now. How did that go?' This is a way to ensure accountability, but it's also an easy, quick way to celebrate success and acknowledge the things we have accomplished."

The Jewish Federation of Greater Atlanta has developed a template for tracking follow-up items. (See the toolkit online at www.bridgespan.org/special-collections/executive-team-effectiveness-toolkit.) "Our chief of staff also tracks and records follow-up items during meetings and sends reminders to ensure that everyone who said they would do something at a previous meeting actually completes their tasks. We then start our next meeting by asking about where we are with those items," CEO Robbins said.

Executive Team Dynamics and Behaviors

Organizational success requires a cohesive executive team. A cohesive team sets the tone for the rest of the organization, modeling the importance of collaborative behavior. The set of dynamics below support productive engagement for an executive team.

The six key dynamics for executive teams

Constructive Conflict

Comfort with and encouragement of diverse perspectives and productive disagreement as necessary ingredients to innovation and good decisions

Shared Ownership

Joint responsibility for agency-level trade-offs and decisions beyond the work of an individual's department

Accountability

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

Trust

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

Equity & Inclusion

Prioritization of diversity, equity, and inclusion in the team's work; identifying and mitigating bias in team discussion; and seeking out underrepresented perspectives when gathering input

Collaboration

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

Prioritizing Behavioral Norms

The steps on the following page will help you prioritize a set of team behavioral norms that will support executive team effectiveness. The first step is for each executive team member to choose six of the following behavioral norms (or new ones they do not see here) using this worksheet.

Shared Ownership	Trust (Psychological Safety)	Equity and Inclusion	Constructive Conflict	Collaboration	Accountability
• We make the best decision for the organization overall, not for our own function or department. • We share our perspectives and ask questions even if the issue is not in our area of expertise. • We prioritize the work of the team above our personal functional responsibilities.	• We seek to build relationships with our teammates, so we better understand each other. • We model vulnerability, explaining personal perspectives and sharing our mistakes when they arise. • We actively seek and acknowledge the input from our teammates, demonstrating our desire for their views. • We show respect to our teammates' perspectives by not interrupting or dismissing their input.	• We often ask each other "what bias might be in this conversation and how can we mitigate it?" • We seek out marginalized voices and bring their input into this room. • We make improving diversity, equity, and inclusion a priority in our organization and our work.	• We engage in candid, constructive debate. • We generate alternatives and play "devil's advocate." • We mine for conflict, seeking out different viewpoints. • We have the real conversation in the room, avoiding side negotiations.	• We actively listen to and consider the ideas of our teammates. • We build on the ideas and perspectives of our teammates. • We care about the problems of our teammates and proactively share ideas and information.	• We uphold our team commitments and behaviors. • We close out meetings with a recap of each members area of accountability. • We follow through as a team and individually. • We support decisions once made, regardless of personal views. • We give each other feedback and support to improve our team experience.

These are examples. There may be other dynamics or behaviors that are critical for the context or work of specific teams. Also, some behaviors can contribute to more than one dynamic.

Prioritizing Behavioral Norms: Instructions

1 **Set team norms: agree on the critical few (5-6) behaviors to focus on**

- As a team, review the list of team dynamics and associated behavioral norms and ask:
  - What are the most critical behaviors we need to prioritize to execute the specific work we have set out to do as a team?

2 **Explore actions you can take to more consistently achieve these behaviors**

- For each identified behavioral norm, ask:
  - What would it look like for us to be at our best at this behavior?
  - What gets in the way of us consistently demonstrating this behavior?
  - What commitments do we need to make or steps do we need to take as individuals or as a full team to improve?

3 **Establish ongoing ways to remind and reinforce these behaviors over time, e.g.,**

- Attach shared behavioral norms to meeting agendas
- Commit to proactively show appreciation for others' productive behaviors and, when needed, provide feedback focused on the behavior, not the person
- Assign "behavior stewards," team members who are responsible for holding the team accountable for one or more team behavioral norms
- Reserve time every quarter to do a process check

Are we living into our behavioral norms?

4 **Research shows that better interpersonal relationships enable better teamwork; to that end, create structured opportunities for team members to get to know each other better, e.g.,**

- Start every meeting with a check-in question that reveals something personal about yourself (builds understanding and vulnerability)
- Invest in intentional team-building exercises (e.g., offsite retreat, personality assessment tools, executive coaching)
- Plan opportunities to get to know people outside the work context
- Invest in one-on-one relationships; have each team member spend one-on-one time with every other team member periodically. (Find suggestions for specific questions for this time together on pages 33-34.)

Prioritizing Behavioral Norms: Client Example

Erie Neighborhood House Leadership Team behavioral norms

Erie House as an agency is our #1 team.

We give each other the benefit of the doubt and ask clarifying questions before jumping to conclusions.

We demonstrate vulnerability and ask for help.

We really listen, ask why, and seek to understand rationale and intentions, from each other and all staff perspectives.

We are solutions-focused, and focus on our mission, in all the work that we do.

We commit to understand and champion others' departments, and each other.

We commit to being present and engaged.

We demonstrate trust and courage by voicing our opinions and asking others to do the same.

We're responsible for agency culture and demonstrate cohesive leadership by presenting a unified front and not undermining each other or decisions agreed upon as a team.

Wherever possible, Leadership Team will be consulted for input on decisions that impact the agency.

Remember that participants are our number one priority, and our decisions are grounded in our mission and values.

We close out each meeting with a recap of what has been decided, how decisions will be communicated, and what each person is accountable for and when.

Executive Team Dynamics/ Behaviors: Peer Perspectives

No two executive teams are alike when it comes to team dynamics and behaviors. Each team comprises a set of unique individuals, all of whom have their own approaches to work and personalities. Yet the effectiveness of the team relies on collaboration and alignment. One key lever a CEO can pull to ensure time together is well spent is to establish clear behavioral norms of how the team will work together.

Kirstin Chernawsky, the executive director of Erie Neighborhood House, found that focusing on her team's norms helped her create a path to increased nonprofit team effectiveness. (See page 28 for the list of behavioral norms that the executive team of Erie Neighborhood House developed.) Here she tells us how she did it.

How did your team develop its behavioral norms?

"We went through and named as a group what we thought our norms should be. Then, we went around the table and had each individual person say, 'Yes, I buy into, agree to, and am committed to these.' This made a night and day difference for us, because at first, we simply asked the group if anyone had objections, and no one said anything. It wasn't until we went around one by one that objections were surfaced. If we hadn't done this, I think we would have moved forward with our original set of norms, which would not have been successful. We went through one to two further iterations before we were all in agreement. It was a difficult process, but the front-end work was worth it; it made the norms that much more successful thereafter."

What have been the benefits of establishing these norms?

"The process of coming up with the norms itself can be a way to air grievances directly or indirectly. The process of working together to develop and agree on these norms is almost more valuable than the norms we landed on themselves. The norms also make it easier to have courageous conversations. They make us feel empowered and comfortable to call out ways we aren't being accountable to them, and also to celebrate when we have done a really good job of living into them. They have served as a way to keep us on track and remind us of the work we put into this process. They have also been helpful for bringing new team members into the group."

Which norm has had the biggest impact on team dynamics?

"One of the biggest norms in terms of importance is our norm that Erie Neighborhood House is your number one team. This captured that team members need to balance the needs of their staff and program participants with the leadership team's overall responsibility for the success, leadership, and culture of the organization. We use this as a reference point when making decisions. This norm took the most time to get everyone's buy-in, but of all the norms, I think it was the most revolutionary for our group."

How does the team hold itself accountable to upholding these norms?

"We list out our norms on every one of our meeting agendas. Then, at the end of each meeting, we designate five minutes to actually read through the norms and do a self-audit of whether or not we adhered to them. There are two purposes to this. First, it helps keep the norms front and center in our minds because we are actually re-reading them. Second, the self-audit exercise helps ensure we stay accountable."

Do you have a plan in place for updating your norms?

"Yes. We agreed that our list of norms should be a living document, not something that's set in stone. We have established opportunities in our team's annual calendar to revisit the norms and ask ourselves: 'Are these working? Is there anything missing? Do we need to revise these?' This way, we don't feel constrained by the current list."

Do you have any other advice for organizations on establishing behavioral norms?

"If you are a new executive director, do this as soon as possible. You almost aren't a team without it. Even if you come into an organization and group that has established norms, take the time to revisit them and get clarity on what they mean to each member of the team."

Featured Organizations

Kirstin Chernawsky
Executive Director
Erie Neighborhood House

Dorri McWhorter
CEO
YWCA Metropolitan Chicago

Eric Robbins
President/CEO
Jewish Federation of Greater Atlanta

Erie Neighborhood House

Based in Chicago, Erie Neighborhood House provides programs for Latinx immigrants alongside individuals and families of all backgrounds focused on education, critical services, and trauma-informed care. They have around 200 employees and an annual budget of around $9 million.

Jewish Federation of Greater Atlanta (JFGA)

JFGA cares for, connects and strengthens the Jewish community throughout greater Atlanta, Israel, and the world. Federation has a professional staff of around 75 and an annual budget of $11 million.

Featured healthcare organization

This healthcare organization provides medical services in Illinois. They have around 300 employees.

YWCA Metropolitan Chicago

The YWCA Metropolitan Chicago provides comprehensive services to women and families spanning economic empowerment, health and wellness, STEAM and youth programming, early childhood education, family support, and sexual violence support services. They also provide a variety of workplace solutions advancing diversity, equity, and inclusion. The organization has nearly 200 employees and an annual budget of $24 million.

Additional Resources

CEO leadership

Nicki Roth, When the Change Needs to Be *You* (The Bridgespan Group)
Column by leadership consultant Nicki Roth that helps leaders assess their need to change and offers guidelines for changing leadership behavior

The River Group, Build It and They Will Lead (The River Group)
Perspective by a leading consulting firm to for-profit executive teams on what CEOs must do to actively develop their executive team into a higher performing unit

Roxane White, How to Lead High-Performing Nonprofit Executive Teams (The Bridgespan Group)
The approaches Roxane White, former CEO and president of Nurse-Family Partnership, used to encourage high performance from the executive teams with which she has worked.

Work of the executive team

The River Group, Good Plow, Wrong Field (The River Group)
Perspective by a leading consulting firm to for-profit executive teams on how CEOs can ensure their executive teams are focused on the right work at the right level

Ruth Wageman, How to Define the Work of Nonprofit Executive Teams (The Bridgespan Group)
Q&A with leadership expert Ruth Wageman on how to get teams focused on the priorities that will make the most of their valuable time

Executive team composition

Michael D. Watkins, How Managers Become Leaders (*Harvard Business Review*)
Article by Michael Watkins, professor of Leadership and Organizational Change at IMD, on required perspectives and capabilities of the executive team

Jacques Neatby, The Ballooning Executive Team (*Harvard Business Review*)
Article by Jacques Neatby, an advisor to North American and European executive teams, on how CEOs can address oversized executive teams

Nicki Roth, How to Optimize Nonprofit Executive Team Composition (The Bridgespan Group)
Q&A with leadership consultant Nicki Roth on how CEOs can assess what they need to lead their organization over the long haul; provides a good starting point from which to consider who and what roles should be on the executive team

Diversity, equity, and inclusion

Rocfo Lorenzo et al., How Diverse Leadership Teams Boost Innovation (BCG)
Article by BCG partners on how increasing diversity of leadership teams leads to improved innovation and financial performance; includes steps that organizations can take to improve diversity

Sean Thomas-Breitfeld and Frances Kunreuther, Race to Lead: Confronting the Nonprofit Racial Leadership Gap (Building Movement Project)
Report summarizes findings of the Building Movement Project's survey on nonprofits, leadership, and race in the nonprofit sector; highlights ways the nonprofit sector can approach the racial leadership gap

Equity in the Center, Awake to Woke to Work: Building a Race Equity Culture (see "Senior Leadership Lever" section) (ProInspire)
Report by ProInspire, a social sector leadership development organization, that serves as a reference for individuals and organizations expanding their capacity to advance race equity; "Senior Leadership Lever" section identifies characteristics and actions that the senior leadership team need to do this

Racial Equity Impact Assessment Toolkit (Race Forward)
A guide to systematic examination of how different racial and ethnic groups will likely be affected by a proposed action or decision, by Race Forward, a nonprofit racial justice organization

Maria Hernandez, How to Integrate Diversity, Equity, and Inclusion into Everyday Operations (The Bridgespan Group)
Article by Maria Hernandez, practice leader for Global Consulting Solutions at InclusionINC, on the practices and behaviors that nonprofit leaders need to adopt in order to live into a commitment to integrating diversity, equity, and inclusion into their organizations

Effective meetings and communication processes

Making Every Meeting Matter *(Harvard Business Review)*
Harvard Business Review guide that provides a variety of perspectives on making any meeting more effective

The Meeting Advantage (The Table Group)
Web-based tool developed by The Table Group, Pat Lencioni's consulting firm, that provides information on cultivating organizational health through strong meetings; subscription required

Patrick Lencioni, *Death by Meeting* and Death by Meeting digital materials (The Table Group)
Noted author and speaker on team effectiveness Pat Lencioni shares his approach to meetings, including activities and templates to guide implementation

Libbie Landles-Cobb, How to Lead Effective Nonprofit Executive Team Meetings (The Bridgespan Group)
Short article by a Bridgespan partner that identifies common mistakes and good practices to transform nonprofit executive team meetings from time sinks into engaging opportunities to really get things done

Executive team behaviors

Decision making

Caroline McAndrews et al., Structuring Leadership: Alternative Models for Distributing Power and Decision-Making in Nonprofit Organizations (Building Movement Project)
Article by the Building Movement Project—an initiative focused on addressing leadership in the nonprofit sector—that highlights distributed leadership structures, including elements and practices that must be in place for alternative models to work and common indicators of success

Team dynamics

Building a Better Executive Team (The River Group)
Perspective by a leading consulting firm to for-profit executive teams on the indicators of success for an effective executive team, particularly around assessing the quality of team dialogue

Laura Delizonna, High-Performing Teams Need Psychological Safety. Here's How to Create It *(Harvard Business Review)*
Article by Laura Delizonna, executive coach and Stanford University instructor, on the importance of trust for high-performing teams and how teams can increase their level of psychological safety

Peter Thies, How to Support Effective Dynamics in Nonprofit Executive Teams (The Bridgespan Group)
Q&A with Peter Thies, president of Boston-based consultancy The River Group, offers a glimpse inside his playbook for developing effective nonprofit executive teams, highlighting the team dynamics that support collaboration

Personal Histories Exercise (The Table Group)
Exercise to improve trust by giving team members an opportunity to demonstrate vulnerability in a low-risk way and to help team members understand one another at a fundamental level so that they can avoid making false attributions about behaviors and intentions

Team Effectiveness Exercise (The Table Group)
Exercise to give team members a forum for providing one another with focused, direct, actionable feedback about how their individual behavior can improve the performance of the team

General

Libbie Landles-Cobb, et al., Increasing Nonprofit Executive Team Effectiveness (The Bridgespan Group)
Article by Bridgespan consultants that examines the different priorities, expectations, systems, and behaviors that can improve executive team performance; includes a number of experts' perspectives, across critical elements of effective executive teams

Patrick Lencioni, T*he Advantage: Why Organizational Health Trumps Everything Else In Business* (Jossey-Bass)
Noted author and speaker on team effectiveness, Pat Lencioni's book focuses on key aspects of organizational health, including executive team's role, communication, systems, and meetings

Ruth Wagemen et al., *Senior Leadership Teams: What It Takes to Make Them Great* (Harvard Business Review Press)
Leadership expert Ruth Wagemen and co-authors from Harvard University and Hay Group's McClelland Institute for Research and Innovation focus on how to determine whether a senior leadership team is needed, craft its purpose, ensure it consists of the right members, provide appropriate structures and support, and sharpen team competencies

Leslie Bonner, Building Healthy and Effective Nonprofit Leadership Teams (Dewey & Kay Nonprofit Consultants)
Report by Leslie Bonner, a consultant, coach, and facilitator for nonprofits, on findings from a survey of senior teams in nonprofit organizations, including common challenges and ways to address these

Jon R. Katzenbach, *Teams at the Top* (Harvard Business Review Press)
Book by Jon Katzenbach, a leading practitioner in organizational strategies, that explores dynamics that characterize leadership groups at the top of organizations