

Session VII Readings



Management and Strategy
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ASPEN
IMPACT



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Looking Ahead

“Don’t look for facts or answers — look for better questions. It’s the questions we ask, and the meaning we explore, that will generate the insights most useful to strategy.”

Jason Fox

“We are not retreating. We are advancing in another direction.”

Douglas MacArthur

“It ain’t what you don’t know that gets you into trouble. It’s what you know for sure that just ain’t so.”

Mark Twain, possibly

“Never confuse movement with action.”

Ernest Hemingway



Advice about Volunteer Recruitment and Engagement

These comments are based on Bryan's experience with volunteer programs plus insights from 'The Essential Guide to Managing Volunteers at Your Nonprofit' by VolunteerPro.

Below are six well-researched motivations for volunteering. For each motivation, a certain message or two may be most appealing to your volunteers:

Motivation	Recruitment Message
Values Express altruistic and humanitarian values.	Act upon your values and help others who are less fortunate.
Career Improve career prospects.	Build your resume and grow your professional contacts.
Social Develop and strengthen social ties.	Be a positive role model as you volunteer with your friends and family.
Understanding Gain knowledge, skills, and abilities.	Learn more about the causes you believe in and build your skills in this arena.
Enhancement Help the ego grow and develop.	Take pride in your community work and expand your social circle of friends.
Protection Protect the ego from the difficulties of life.	Immerse yourself in volunteer activities that will bring positive experiences into your life and the lives of those around you.

An analysis of 1,400 case studies of successful advertising campaigns found that campaigns that conveyed purely emotional content (“brighten lives, have a great experience, help someone who is hurting”) performed twice as well as campaigns that just focused on rational content (“each winter, five hundred adults in our city need help paying for heating”). Purely emotional campaigns also outperformed mixed emotional-rational campaigns. If your services are not well known, you could summarize one or two of them, and then jump into messages about how your work reduces seniors’ sadness or fear, makes children happier or more energized, helps people overcome loneliness, celebrates the joy of theater, etc.¹

¹ <https://www.neurosciencemarketing.com/blog/articles/emotional-ads-work-best.htm>



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These words tend to be especially powerful at connecting with audiences:

- **You:** Write as though you are speaking to the potential volunteer.
- **Free:** Identify something a potential volunteer will receive for free.
- **Because:** Explain why you need volunteers or what your nonprofit does.
- **Instantly or immediately:** Say how quickly volunteers can start making a difference by working with your organization.
- **New:** Create a new program, initiative, project, or training activity.

Integrate these words into the headers and body paragraphs of your web pages and e-mail messages about volunteer opportunities.

Identify and address the most common concerns or objections people might have about your cause, such as matters of cost, safety, transportation, and time commitment.

When interviewing potential volunteers, design your questions to gauge each potential interviewee's strengths in these three areas:

- **Basic skills and mindsets**, such as time management skills, commitment to the program, and knowledge about your organization's mission
- **People skills and character traits**, such as compassion, listening, conflict management, and responsiveness to feedback
- **Technical skills**, such as ability to use computer software, write materials clearly and persuasively, drive a vehicle, and follow safety protocols

Periodically reassess your volunteers to make sure you are giving them opportunities that match their skills and interests. Some volunteers get used to helping in certain ways and may be unaware that they could make a more enjoyable and meaningful impact by switching to different roles, so periodic role-checks could ensure that your evolving needs and your volunteers' interests and skills continue to align over time.

You can also run debriefing exercises at the end of each volunteer day to learn how well that day's activities matched the mindsets, character traits, and skills of your volunteers. For example, the People Making a Difference community service group in Boston finishes each volunteer day with a debriefing conversation. Participants munch on chocolate chip cookies while they reflect together on what they did that day, what they learned about the social issue, what skills they developed, how their work made a difference, and what further volunteer activities could help the community in the future.





How COVID Experiences Will Reshape the Workplace

This article is courtesy of the Harvard Gazette: news.harvard.edu/gazette/story/2021/02/how-covid-experiences-will-reshape-the-workplace/



Scholars say shutdowns and remote work yielded insights for employers, workers

Now that COVID-19 vaccines are finally here, employers have begun looking ahead to an eventual full return to the workplace in the coming months. But even though their offices may look exactly as they did last spring when most white-collar organizations shifted to remote operations, they will find that things will be very different, say [Harvard Business School](#) (HBS) faculty who study the work world.

The pandemic has sped up macro trends in consumer behavior, business management, and hiring. That, along with insights gained by months of adjustments to work roles, schedules, routines, and priorities, have prompted employers and employees to reconsider many default assumptions about what they do along with how and why they do it.

The changes will vary by field and employer, but experts predict flexibility and safety will be top priorities that could bring, for instance, a rethinking of the five-day work week and the way employees earn and spend vacation time. Also, the power dynamics between employers and employees will shift as each reappraises the other's roles in light of what they learned during the pandemic. And organizations will likely give more attention to employees' mental health care, getting a closer look at the daily personal pressures their staff face.



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“It’s the Next Normal we’re headed to, not ‘back to normal,’ and that, for a lot of companies, is going to feature changes in work practices, changes in employee expectations of their employer, and companies learning from this duress about what they can do to be more effective and efficient and attractive employers,” said [Joseph B. Fuller](#), professor of management practice and co-founder of [Managing the Future of Work project](#) at HBS.

One of the first challenges businesses face will be the question of whether to ask, or even insist, that employees be vaccinated before coming back to work. For a variety of reasons, not everyone will agree to do so, leaving employers to struggle with how to protect their other employees, customers, and clients, while not violating civil rights laws.

One year into the pandemic, the Occupational Safety and Health Administration (OSHA), the federal regulatory agency that oversees private sector workplace safety in all 50 states, had not established national COVID safety standards under President Trump, leaving individual companies and industries to set their own protocols and policies.

“It’s bananas to entrust our public health decisions to disaggregated, atomized employers making their own decisions about what’s good enough and what’s not,” said [Terri Ellen Gerstein](#), director of the State and Local Enforcement Project at Harvard Law School’s [Labor and Worklife Program](#). “With OSHA abdicating its responsibility, that’s been happening in too many places.”

President Joseph R. Biden Jr. signed an executive order Jan. 21 directing OSHA to issue revised COVID-19 safety guidance for businesses within the next two weeks. The order also calls for the agency to consider setting emergency temporary COVID safety standards, including whether masks should be required in workplaces, by March 15; a top-to-bottom review of OSHA enforcement efforts, which worker advocates, including Gerstein, have called lax; and begin focused enforcement on firms engaging in large-scale violations. The order did not, however, address the issue of whether workers could be required by employers to receive vaccinations before returning to their workplaces.

Employers should “absolutely recommend” employees get vaccinated, if that’s their goal, but not demand they do so, advises [Ashley V. Whillans](#), a behavioral psychologist at HBS who recently surveyed 44,000 remote workers in 44 U.S. states and 88 countries to study how the pandemic is affecting workplace attitudes and behaviors.

“Make it an opt-out policy but have a formal process for opting out that doesn’t involve having to email your boss or talk to a specific manager in the office. We’ve shown in other contexts that having formal policies that don’t involve speaking to another person who’s directly responsible for your compensation can help employees feel confident in making decisions that are more aligned with their personal values and less likely to make decisions based” on how others may perceive them, she said.

“I think the workplace issues in our country so often are dealt with in this zero-sum way, where worker interests are seen as adversarial to business interests,” said Gerstein. “And this is really a situation where everyone has to make sure that people are safe at work.”



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That's just the beginning. The pandemic has jolted the foundation of a workplace model that had been relatively unchanged since the late 1920s: employees traveling from home to a workplace five days a week, between 9 a.m. and 5 p.m., to complete their obligations.

Since March, employers have had time to reassess which jobs and employees are truly essential to the success of their business, while workers have been able to reconsider the daily demands their jobs place on their lives, such as travel, commuting, or following rigid work day schedules, and whether they're still willing to tolerate them, said Fuller.

That's led to once less-common trends like workplace flexibility, "work from anywhere," and virtual meetings becoming more mainstream. With broader acceptance, Fuller expects many knowledge-based industries will move to a four-day work week, cut back significantly on travel for internal activities like training and sales meetings, and do away with vacation policies tied to an employee's years of service. Instead, workers could take as much time off as they wish provided their work is done, an approach first embraced by Silicon Valley firms.

It has also disrupted the balance of power at work. Where employers used to set the terms of employment — where, when, and how the work gets done — Fuller said the question of "who decides" is now much more up for grabs.

Organizations that offer employees the ability to work flexible schedules, to choose when and how they come into the office, and that have adopted increased COVID safety precautions score highest with their workers, according to Whillans' COVID survey data. As employers prepare to reopen, they would be wise to maintain and emphasize flexibility and safety regulations, and allow staff to come back to the workplace at their own discretion.

"Organizations need to clearly communicate their expectations for employee engagement and how often they assume their employees need to come in. If there are any changes to office policies, like lunches or common spaces not being available, they should clearly communicate these as a safety precaution," said Whillans. Too often, firms "under-communicate" out of fear of how messages will be received. Research shows that conveying as much information as possible, being almost "overly transparent," helps win trust.

One effect of the pandemic that will persist long after businesses reopen is employees' mental health, Whillans and Fuller say. The virus' physical, social, and economic impacts have not been felt equally, which has led to "significant" mental health strains, including increased anxiety and depression, on people at every level within organizations and across industries. Even those who did not become sick or laid off report worries about their own health and that of loved ones, the possibility of losing income, or just the constant uncertainty over when, or if, their lives will return to normal.

"We are observing high levels of burnout and stress," even among workers who still appear to be high functioning, said Whillans. Fuller said many business leaders got a "real wake-up call" about the daily complexities their staff members must navigate, like caring for young children or elderly parents, just to be able to get to the office and be productive. "It's caused them to have to reflect on the totality of their workers' life experience," he added.



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In the coming months, employers will need to provide more support to employees than ever before, either in the form of temporary relief, job sharing, or other incentives, in order to help them deal with the increased stress they've been experiencing, said Whillans.

“Organizations are likely to miss thinking about well-being as one of the decision-making factors that goes into whether they open and how they open,” she said. “I would really underscore the importance of organizations not overlooking employees’ health and safety concerns. Burnt-out employees are going to be less productive and more likely to quit.”

Virtually every business has discovered new things, both good and bad, about themselves over the last 10 months, but the smartest ones will have used the time to also ask new and different questions of themselves, said Fuller.

“They should use their learning from this period to ask themselves questions like: What have I learned about what allows people to be productive and have a better quality of work life? Should I be revisiting the way we do things around here based on that? What have I learned about communicating with my workforce? And what do I want to make sure we continue to do if the practices that we developed in this crisis are better than what we were doing?”



Leadership Succession

By Bryan Richards

Leadership succession is typically a multi-step process to identify and groom a new organizational head, but it can be more than that. It can be a time to shape and convey the values and aims of the organization as a whole. An effective succession planning process pays special attention to the wishes, concerns, and priorities of the staff, volunteers, and board. Through interviews, conversations, and documentation, the process can capture the wisdom of all these parties: What has worked well, what ought to change, what resources and community connections are most important to preserve as the leadership changes, and so on. In addition, a thoughtful approach to transition can produce new leadership that embodies the culture and aims of the organization as a whole. This leadership could take the form of a new Executive Director, President, or CEO in a hierarchical model, or a shared governance team wherein decision-making power is more widely and flatly distributed.

Steps in the Process

From the outset, make the decision-making powers clear. Who will design the leadership position? Who will select the new leader? Who will play roles as advisors during this process? Accordingly, these steps enable an effective succession:

- 1. Identify one person to guide the process.**
This person could be the outgoing director, but if the board is knowledgeable enough about the organization and the necessary responsibilities, a board member might be a more objective guide for the succession process than an outgoing director would be. This person should ensure the smooth completion of all key matters for the transition: position descriptions, candidate recruitment, candidate selection, timelines, compensation, knowledge transfer, and so on.
- 2. Identify the time horizon for choosing a new leader.**
Designate the months in which the selection process will occur. Ideally, the transition will occur during the traditionally quieter months in an organization's annual calendar.
- 3. Decide who should be involved in writing the position description.**
This decision may depend upon how much your nonprofit wants to preserve elements of the outgoing leader's role. If multiple people independently draft the position description, the succession planning team may discover assumptions and goals that could lead to a more ambitious, novel, or focused future leadership role than any one person might have envisioned alone. This approach may be more fruitful than simply having the board chair and/or outgoing executive director write the position description.



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4. **Identify people to contact for advice.**
These people could be nonprofit or business leaders elsewhere who left or entered a leadership position, board members who have guided a succession process, consultants who have led or assisted with succession activities, and/or funders who wish to see your nonprofit thrive in the future.
5. **Designate the person(s) who will finalize the choice of successor.**
Will the choice of the successor require a majority or unanimous vote from your executive committee or full board? If the decision may ultimately hinge upon a tie-breaking vote, who should make the vote? Address these questions before launching the recruitment and hiring process so the decision-maker(s) will have ample time to establish criteria and priorities for the hiring decision.
6. **Define the post-transition role for the outgoing leader.**
Decide how much, or in what way, your organization wishes to keep the outgoing director on-hand after the new leader has officially started in his or her position. An effective succession process could involve an apprenticeship period during which the departing leader teaches the role to the new leader, though sometimes an organization will skip this step with the aim of having a fresh new start. Once the new leader has officially taken office, it is often wise for the outgoing leader to leave, at least for a defined period of a year or more, so the new leader can assert authority and apply his or her leadership style to guide the organization into the future. The incoming leader may, after a while in office, invite the outgoing leader to return to the organization in a new role, such as a board or advisory role.
7. **Map these steps and make them visible to all parties who will be involved in the succession process.**
Draw the succession timeline and post it for easy consultation by the board, staff, and other participants in the process. Periodically check the succession planning team's progress, especially if the process is designed to take several months or longer. Make adjustments as necessary in alignment with your organization's evolving needs, resources, and position within the community.

Operational Support and Risk Mitigation

While this process is underway, line up support structures and mitigate risks:

1. **Consider potential risks and craft solutions to minimize each risk.**
The use of an apprenticeship period can preserve knowledge and insights from one leader to the next, while also solidifying the commitment of the new leader. Train staff and board members to handle certain crucial activities of the outgoing director during the transition period. This training will ease the acclimation period for the incoming leader. This cross-training step may also provide a safety cushion in case the incoming leader backs out of the role during the succession process.



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2. **Line up the resources to provide an attractive recruitment package.**
Make the position attractive enough – while still affordable for the organization – so the new leader will not harbor second thoughts about committing to the position. Consider forms of compensation that are both financial (such as salary and benefits) and non-financial (such as access to certain community resources, memberships, and other perks).
3. **Line up the resources to provide enough support for the position.**
If the outgoing leader was constantly juggling leadership responsibilities with administrative ones during his or her period in office, consider investing in an administrative assistant or other staff so the incoming leader will be able to focus on providing organizational leadership from day one onward. Arrange the necessary infrastructure, too, to ensure a smooth transition. This infrastructure may include a phone, e-mail account, computer, and other items that will be crucial to the person's performance at the start.
4. **Create a list of people, groups, and resources in the community that could be instrumental to the new leader's performance.**
The outgoing leader and the board should develop this list and then connect the new director to each entity on the list. The outgoing leader and/or board should also highlight technical matters that will be crucial to the new leader's success, such as important reporting requirements for existing grants, role-sharing arrangements and partnerships with other organizations, legal obligations for matters such as leases, and so on. These items may be the responsibilities of an Operations Director or other staff person, but the new leader should learn of them in order to monitor and guide them along.
5. **Make a communications plan to announce the new leader.**
If the announcement of the leadership transition involves spotty news releases to a limited number of parties, the new leader will have to spend an unfortunate amount of time informing and reminding the community that he or she is now in the role. Make the transition visible by identifying and reaching out to all relevant stakeholders, including your service population, board, staff, volunteers, donors, grant providers, sponsors, program partners, suppliers, media contacts, and civic leaders as the transition process nears completion. Host a ceremonial activity such as an open house, a social media announcement, a press conference, or a meet-and-greet day to officially signal the beginning of new leadership in your organization.

Refinement of the Leadership Structure and Practices

A transition period is often a great time to reassign duties, streamline activities, and clarify roles. This period provides a unique opportunity for your nonprofit to reflect upon structural and cultural items that may have buoyed or hindered the outgoing leader's performance. Consider questions such as these:



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- Did the outgoing person have too little or too much power?
- Were this leader's decision-making activities as transparent as they should have been? Did others understand the logic behind the decisions?
- Was the working environment as supportive and motivating as it should have been? Were the communication and decision-making practices helpful or harmful in these respects?
- Did other members of the staff have meaningful opportunities to take on new responsibilities and elevate their leadership and management skills?
- Did the staff connect with other organizations in the field, or were they too frequently behind the scenes while the leader alone stayed visible?
- During the outgoing leader's term, was it clear which responsibilities and expectations belonged to the board, the chief executive, other staff members, and any other instrumental parties?
- Did lay donors – not just the major funders – feel fully appreciated? Did your organization welcome and encourage input from supporters whose insights and connections would have advanced your mission?

These questions are important to ask not only during the succession planning process, but also once the new leader is in place. Your new leader can conduct a “listening tour” with such questions to develop a broad and deep understanding of issues and opportunities that bolstered or undermined your organization's performance in recent years. He or she can use this information to preserve positive dynamics and make improvements that will help your nonprofit excel in the years to come.