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CULTIVATING CULTURE

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Submitted in partial fulfillment of the requirements for the degree of

Masters of Arts

Division of Communication

University of Wisconsin-Stevens Point

2020

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Cultivating Culture

Your organization as a living, growing thing

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Created for:

Division of Communications

University of Wisconsin Stevens Point

Project for:

Masters of Arts in Communication

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Introduction

This presentation was created to help non-profit board members, volunteers and staff improve the conditions in which they work in the hope that they can reduce the possibility or severity of situations like I found myself in when I took over an organization that had existed for twenty-seven years. When the founding executive director retired, the organization lost its direction and integrity. This was due to a lack of focus on the organization's culture and sustainability. The situation was exacerbated by the absence of certain important items from the organization's foundational documents.

This document was written as a script to accompany a set of presentation slides. The references at the end of this document could also be shared as a take-away from the presentation.

Audience

This presentation has been written to help people who are new to running a not-for-profit organization and those who wish to learn more about how they can develop a positive work environment for staff and volunteers. Many of these people likely have retired from businesses where they are used to the top-down classical managerial model. They may not have experience managing people or utilizing communication techniques that promote collaboration, inclusion and building trust.

This presentation may be given as regular board training or may be requested due to a special case where the board needs understanding and insight into an issue before it becomes severe. My experience could be informative to them and possibly influence their communicative styles to prevent undue hardship.

Presentation

Slide 2: Introduction

A few years ago, I threw myself into a situation for all the right reasons and it got a little out of control. I eventually had to step away and move on. This all started when I took over a little-known organization which had quietly existed for nearly thirty years. This organization taught reading, writing and spoken English skills to any adult who needed help for any reason. The organization also taught math, computer literacy and job-related skills. The tutors even helped people finish their high school equivalency and even helped a few people acquire nursing aide's licenses.

However, we are not here to talk about what I did. We are here to talk about what you are working on, whether you or your organization are new or you're just here to learn. I hope that I can share some of my experiences and insights which may be helpful for you to avoid a situation similar to mine. What I went through with this organization was unfortunate and unpleasant. I had worked so hard to save the organization, and I was saddened by its eventual dissolution not long after I left. Sometimes our best lessons come from failure, yet no one desires to fail.

Like you, I like solving problems and non-profits are a great way to address local issues which are not being addressed in any other way. You gather a few people together, and you all want to confront the issue in your community. There's one problem with this; starting a not-for-profit isn't as easy as it may seem. Research shows that roughly half of non-profits are set up to fail (Altman, 2016). Part of the challenge with starting a new non-profit is the sheer amount of material you and your group need to create and the pile of paperwork that you need to file just to do everything the right way.

Slide 3: Overwhelmed

People get so enthusiastic about making a difference they jump right in and get to work. According to Ian Altman of Forbes (2016), many small businesses are started with little planning and something similar can be said for non-profits. Planning is useful for when everything goes right to insure that everyone stays on task and that goals are maintained. Plans are just as important for when things are not going the way they should. For example, in a small business setting, maybe the technology that your business uses might become obsolete, as happened with me when I was a Macromedia Director developer. For a non-profit, maybe you need to raise money, there's an influx of clients, or maybe a sudden loss of clients or volunteers puts the effort in jeopardy. External factors like these are something we do not have control over. However, both businesses and non-profits are susceptible to troublesome people on the inside whose attitudes or actions can hurt the organization. This internal strife is something we can at least attempt to mitigate.

Many organizations do not consider organizational culture until much later because they start with a dedicated group of people who all share the same value system, likely have worked together on other projects, and already have a good working relationship. Communication and the culture that this communication creates within the organization should be considered in the beginning so that the organization stays true to its original goals even after the founding members move on to other projects or retire.

Slide 4: Communication

Communication is more than just the letters you write to apply for funding or ask for money from individual donors. Communication starts from the foundational documents which you created to get your organization going and follows into the plans you make. The better you

plan before something happens, the more resilient your organization can be at weathering whatever the world throws at you and the better you can be at communicating with all stakeholders when something goes wrong. Most people do not think about the next person who will take over their seat when they step down, but they should. You should. Your planning documents should be more than just rules about who does what, and how you deal with your clients. They should also be about building bridges, bringing people together, building cooperation and collaboration between members of your organization, your clients and the community at large.

Slide 5: What are Foundational Documents?

I will take a moment to explain what I mean by foundational documents. These are the documents which you need to create to legally be a charitable organization. After you get your board together you need to sit down and discuss your organization's mission and vision. The mission of your organization is what you can do today and how you go about it. The vision is what the organization aims to be in the future (Grobman, 1999, Kenny, 2014, NOBL Academy n.d., Skrabanek, 2020, Sooy, n.d.). Creating these two statements are key to developing an open and inclusive culture for your organization and you will need them in order to work on the articles of incorporation. These articles are what brings your organization into legal existence. This is boiler plate legal stuff so there's not much you can do except fill out the forms and send them off to the state. Next you write the bylaws. This is where you start to determine where your organization is going. The bylaws are the rules which you set down for your organization such as term limits for the board of directors, the procedures for meetings, how and what to look for in an executive director and so on. The bylaws are very important, so you want to spend some time

on them and not just pull a template off the internet and paste your name on top. You'll need your articles and bylaws to file IRS and tax exemption forms. After that, you start planning and building from there. This is why I call the articles of incorporation, bylaws, mission and vision statements the foundational documents. If you want a more extensive checklist, see BoardSource contributor Nick Price's blog post from January 2, 2019 in the references I provide.

Throughout this presentation, you will hear me refer to a board packet, or a board manual. This is a folder or binder which contains important documents, including the bylaws, which the board needs to use to make decisions. Part of this document includes the bundle of policies and procedures which the board develops to run itself and the organization.

Now that you have your foundational documents, we can talk about the rest of your organization. I look at a non-profit organization as a team, all working towards a particular goal.

Slide 6: Teams

The team metaphor is a good way to look at non-profits (Nicholson, Newton & McGregor-Lowndes, 2012, Okarma, 2014) because everyone has different roles and responsibilities, but together you all are working towards the same end. You are a part of the team, even when it is your job to make sure that everyone is playing the game the right way, just as the coach would do for a sports team.

It is everyone's responsibility to ensure that the team is working well together which means that all team members must endeavor to adopt good people skills, good communication and a clear understanding of their roles and responsibilities within the organization. (Hoogendam, 2011, Snowball Fundraising, 2018). If you have any doubts about this, just put me on a football team. Since I know little about the game and have limited vision, I guarantee you

that I will create confusion and chaos, and while that might be fun to watch, it certainly will not win you the game.

Let us break this down into its component parts. At the highest level, your entire organization is a team. Within that team there are other teams. Let us first look at one of these teams: the board of directors.

Slide 7: The Board of Directors

Building an effective board of directors and creating an organization that lasts requires good communication practices (Fritz, 2020). It is very important for the board to know exactly what each member is responsible for and what is expected of them. For example, it is not enough to tell board members that they need to be present, rather outline the parameters which define presence. These parameters may include an obligation to attend board meetings already prepared to discuss issues, as well as insuring that a board member understands that if they miss a certain amount of meetings they may lose their seat on the board. A board of directors has three basic functions.

Slide 8: Three Functions

The first function is planning and policy development. This is the direction of the organization and how it addresses issues that arise in the operation of the nonprofit. Second is community and organizational development. This is assisting the organization to not only find resources but to bring together like-minded people to participate in the cause. This is especially important for board member recruitment because there is no one better suited to finding new board members than the members of the current board of directors. Lastly, fundraising and support development by coming up with ways to bring in money which the organization needs to continue providing the services the non-profit exists to provide.

Slide 9: Board Expectations

As a board member you will be expected to participate in several different ways. These may include making a gift of time, money, and/or personal expertise to the organization. You will be asked for ideas on how to overcome obstacles, so remember that it is best to offer solutions, not suggestions. The difference is that you have taken the time to consider the problem and have come up with a plan based on your experience and you're not just throwing out statements, such as suggesting that the executive director needs to send more emails to clients. Mostly, be present with fellow board members and organizational staff (dotorgsolutions.com, n.d.) so they know that you care about what is going on. Communicate often and remember to put the goals of the organization above your own personal or professional goals (People for the Ethical Treatment of Animals, 2003), otherwise conflicts of interest can arise which puts all the hard work in jeopardy.

I like to think that the board of directors focuses on the greater world outside of the organization while letting the staff and volunteers do the internal work, even though the board is responsible for hiring and monitoring the performance of the executive director.

Slide 10: The Executive Director

Another team is the organizational staff with the executive director leading that team. The executive director is hired and overseen by the board of directors, and should expect to run the day-to-day operations of the organization. The executive director receives direction from the board as a whole in the form of strategic goals and objectives. The board then evaluates the execution provided by the executive director and advises based on the success of that execution. An executive director may be with an organization for much longer than any member of the board, so he or she can be a great resource for historical framing which the board may need when developing strategies and policies. The executive director may help train board members,

provide information about the daily operations of the organization (Hawthorne, 2017) and can help write clear job descriptions and other documents needed to conduct board functions (CausePlanet, n.d., Wright & Millesen, 2008).

You probably have noticed something about the relationship between the board of directors and the executive director. The interconnected nature of the relationship does not seem normal to anyone who sees the board of directors as controlling the organization. The board and the executive director both control the organization, just different parts of it. The relationship between the two works best if it is cooperative or collaborative and not controlling. The executive director can be the best resource for training board members, but also is supervised by the same group he or she is training. Since this relationship can be complex, it is very important to have clear policies, procedures and job descriptions for everyone to follow and fall back on if communication breaks down.

Slide 11: Staff & Volunteers

By far the largest portion of most organizations is the staff and/or volunteers who look to the executive director for leadership and to create a positive environment in which they can work. They help the executive director execute the direction provided by the board and are the people who often provide direct services to the clients. Staff and volunteers may communicate very little with the board of directors directly, except at organization get-togethers or training sessions.

The clients you serve become part of your organization through your interactions with them; but, unless some clients eventually become volunteers or are hired into a position, they are not exactly considered in your organizational structure. However communication to them can be

extremely important. You should be seeking input from them through surveys, testimonials and other means. The complexity surrounding communication to clients depends a lot on the environment in which you work and what sort of work you are doing. In other words, it is something that is beyond the scope of this presentation.

Slide 12: Plan for the future

Once you decide upon the identity of your organization, as well as both what and how the organization needs to communicate, you can react faster and more uniformly when you need it the most. You should plan how you are going to react to a crisis (Benoit, 1997, Claeys, Cauberghe, & Vyncke, 2010, Yang, Kang, & Johnson, 2010), before you start asking for donations. Donors, of time and money, like to see efficient organizations which get resources out to their served populations and do not burn money on administrative costs (Charles & Kim, 2016). If you can show people that you have these plans in place, that can go a long way to building trust. Trust is very important for non-profits to maintain internally, among the board of directors, staff and volunteers in addition to between the organization and its clients, the general public and funders. Volunteers and funders are less likely to give your organization time or money if they do not trust the organization. If they believe that the organization is wasting resources that would better serve the purpose of the organization, then they are less likely to give to it. If clients do not trust the organization, they just will not come.

Slide 13: Served Populations

Many non-profits support underserved populations. An underserved population is any group with issues that are not being appropriately or sufficiently addressed in an area. These populations often include ethnic minorities, the disabled, and the economically repressed. In addition there are other organizations which support art, music and culture. It might seem silly to

run an art cooperative without having artists on the board and I feel the same goes for helping those in need. Increasing diversity and representation in your organization can be as easy as bringing in people from various age groups, ethnicities and socio-economic backgrounds, some of whom may be clients or former clients. Organizations which support diversity tend to have more success working with more diverse populations (Bortree & Waters 2014). Communication also becomes important when drawing on diverse populations to be a part of the team. The effects of board diversity are still being studied because they may affect the policies that the board generates in important ways (Buse, Bernstein, & Bilimoria, 2016).

Organizations do more good for their clients if they are more inclusive, and inclusiveness starts at the board level. Inclusion starts with the communication among board members, between the board and the staff, and reflects into the communication with the clients. The first order of business when it comes to being more inclusive is to get to know more people. Stereotypes have a shorter lifespan when you get to know a more diverse population. Once you see that stereotypes are nothing more than over-generalizations, and often drastically inaccurate, you can start to adjust the language you use to talk to and about other people. Increasing diversity inside the organization can help you serve your clients better and can help you create a better culture.

Slide 14: Barriers

It is important to be proactive in addressing any potential issues to avoid future problems.

Examples of barriers can be found everywhere but can be broken into three basic categories:

Slide 15: Structure

In the structural group, board size is important. If a board is too small it can cause many issues. Some of which are also in this group. Too few board members can create a lack of

functioning committee structure because board members end up being on all the same committees. An ineffective nominating committee or lack of a nominating committee can hurt board recruitment and training which can contribute to board stagnation.

Slide 16: Preparation or Planning

As I mentioned earlier, planning is often something that people put off until later, when they learn they need to, which can leave an organization with no strategic plan. Without a strategic plan, an organization can drift from its original mission or become ineffective. Many boards have no plan for board member rotation, which can lead to further mission drift and stagnation. No plan for orientation of new board members is a problem because new board members can come on board without any history and could be asked to make very important decisions without context which could impair the functioning of the board and possibly injure the organization.

Slide 17: Attitude or (In)Action

This last group is about attitude and the action or inaction which can result from that attitude. Some board members are tempted to micro-manage staff and volunteers. This can be very harmful to an organization because the board may not be equipped to manage and may not be expected to. Boards can also fail to remove unproductive board members (Wei-Skillern, & Marci, 2008) which can be harmful to the organization because the individual may do more harm to the organization by their inaction or through actively fighting with other board members, staff or volunteers. Lastly, my experience shows me that many board members forget that their organization operates in a community of like-minded people working together in the non-profit sector.

In addition, I would also like to add a mistake that I and a lot of other new executive directors make: searching for “best practices” (Smith, 2016, Price, 2017). There are many better ways to communicate, and many ways to run your organization, but looking for some best practices may confuse issues for you. Every organization is different and works within a different environment. These contextual differences mean that there is no one set of best practices to fit every non-profit organization.

Slide 18: Conflict

This brings me to another issue which is not often addressed early on: conflict. When you are working with people who care about what they are doing, conflict tends to be a normal part of coming up with the best solutions. If things get out of control, it can cause significant disruption to your organization (HR Council, n.d.). One significant problem around conflict is that many people downplay or avoid conflict resolution in the hope that it will work itself out (Smith, 2012, Kerwin, Doherty, & Harman, 2011). The hope that all conflict will work itself out is naive and can lead to a less welcoming work environment for anyone who may be suffering from harassment. Harassment can be hard to spot and harder to deal with if the right policies are not put in place early.

If conflicts get too strong, and there’s no way to work it out between the conflicting parties, it might be time to get a mediator (Bruer, n.d.). Mediators are neutral parties who can facilitate discussion between the conflicting parties either in whole groups, the “interface conflict-solving approach”, or in one-on-one settings, the “interpersonal facilitator approach.” The mediator should be at least of equal rank to the highest rank of the conflicting parties, otherwise the mediation likely will not work since the parties will not feel bound by any

resolution (Blake, & Mouton, 1984). Conflict resolution procedures should be included in the board of directors handbook and reviewed regularly by board members.

It is preferable that conflicts be dealt with before they go so far that it becomes necessary to call in a mediator. Non-profit consultant Tom Okarma (2016) recommends a few actions be considered. Some form of these recommendations should be agreed upon by the board and written into policies to be followed by the board. First, without assessing blame, bring up a problem at a board meeting, giving examples of how it is negatively affecting the organization so that all board members can discuss solutions openly.

Next, someone might suggest scheduling a board discussion on the topics of means and ends in which the board and executive director can decide and agree upon together, determining how much into the day-to-day operations the board should rightfully insert itself, and to what degree the executive director has a voice in goal discussions. This is where issues of micromanagement can be dealt with in a civil manner and by the group as a whole. A written record should be kept for future reference and included in the board member handbook. This will look different for each organization, based on prior practices, age and size of the organization, as well as other considerations. Again, agree to write a policy and procedure manual, or amend an existing one, to retain the agreements made at that time and to serve as a receptacle for future decisions. It can be helpful to determine if the organization's job descriptions for board chair, executive director, and other directors, are up to date. If not, update them. Many boards check these documents every few years as a matter of normal routine. Consider altering, or creating, your organization's value statement to include "transparency" and "inclusiveness". Take time to discuss just what these values look like when present during board discussions.

When I say inclusiveness, I am talking about adding diverse populations to your organization (Rahman, 2017). When we talk about transparency, really we are talking about being open to scrutiny, being accountable, and fiscally responsible (National Council of Nonprofits, n.d.).

Consider having the board chair and executive director hold periodic informal check-ins to be sure any lingering issues are brought up in a timely fashion and are not allowed to fester.

Slide 19: Culture

You can create a culture of innovation (Hogan, & Coote, 2013) by adopting clearly defined procedures and policies which promote openness and cooperation. Randy Hawthorne (2016) of Nonprofit Hub writes:

“Culture is complicated—or at least a lot more complicated than most realize. It consists of all of the attitudes, beliefs, values and goals of your organization. It’s embedded in the way you talk to your staff, volunteers, donors and the community at-large. It’s not just the physical environment of your office or workspace, but the overall atmosphere of your nonprofit. Even though you can’t grab culture and hold it in your hand, it’s absolutely everywhere.”

Since culture is part of everything we do, it can be hard to point at something and say “this is culture,” but you can look at how people work together and how they get their work done, and that reflects the culture of your organization. When your organization supports a positive cultural model your staff and volunteers are not afraid to do their tasks, they learn and adapt to new situations and they work very hard towards the mission.

Culture does not operate in a vacuum; the culture of your organization reflects on other organizations which are doing similar work as yours (Le, 2017). When you are considering your organization’s culture, one aspect you need to take into consideration is the management styles of board members and that of the executive director. If an individual’s leadership does not mesh

well with the culture of the organization, then that is one area that needs to be addressed to avoid conflicts.

Slide 20: Blake-Mouton Grid

Building a better organizational culture is important to building a more efficient and productive organization. When you are considering the communication you use to do this, you are balancing two essential factors; the need to be productive, to produce results and the need to treat people as people. This idea is illustrated by Blake-Mouton's Managerial Grid Model (Blake, & Mouton, 1984). This grid shows these two factors as different axes on the grid. While the Blake-Mouton Managerial Grid aims to demonstrate the best management style, the management style alone is not a consistent indicator of success (Blake, & Mouton, 1982). However, if we tweak this idea just a little to communication style, I think we can get an interesting perspective.

This grid represents the two factors that are looked at in the managerial grid model.

Slide 21: People

A manager's people orientation covers a spectrum from low at 1 to a high of 9. A low focus on people is illustrated by a 1 on the left side of the grid at the bottom while a high focus on people is at the 9 position at the top left.

Slide 22: Productivity

Along the bottom of the grid is a manager's focus on productivity. The productivity axis demonstrates how much, or little, the person communicates about the task at hand.

The model postulates that there are five basic styles of management. Managerial styles affect the communication choices these managers make, so it can be helpful to consider them. It can be helpful to ask yourself these two questions when considering your own managerial or

communication style: What sort of manager are you? What sort of communicator do you think you should be?

Slide 23: 1,1

Starting on the lower right, or in the “1,1” position, the manager doesn’t care much for either productivity or the people. They are there to simply warm a seat and collect a paycheck, or just so they can say that they were there, such as with passive board members. These people communicate the least. They just don’t care about the job or the people they are with and they exhibit the least amount of drive to learn new things.

Slide 24: 5,5

The middle ground, “5,5”, can be nearly as troublesome because this manager is moderately concerned about both productivity and people, but not really driven to do more than what they absolutely need to do to remain where they are. These are the people who play to get along, not taking risks or putting too much effort into anything. This type of manager is nearly as adept at ignoring conflicts as the first but may make half-hearted attempts to address issues if they threaten the status quo. These people are often unreliable communicators. They will say whatever they think they need to just to get by. Their lack of preparation and consistency can cause trouble when these people are put into positions in which they communicate in any meaningful way.

Slide 25: Extreme-edge

The two extremist positions, “1,9”, a person who is all about productivity and getting the job done and the “9,1” people-person who’s there to socialize or be “liked,” can cause their own problems, especially in non-profits. In business, “1,9” managers often rise quickly because they get fantastic early results but often lose effectiveness as they burn out the people they are

working with. The “9,1” manager, in contrast, spends too much time and energy socializing and ignoring conflict and not enough time working on what needs to get done: you know, why we are all here in the first place. Both styles can clash with others within your organization and the conflicts which may arise may be significant depending on which styles of management and communication are conflicting.

Slide 26: 9,9

This is one of the rare cases where the ideal situation is not a happy medium. It is not at all in the middle but rather at the top right in the “9,9” position. This manager is the person who cares about productivity while remembering that we are all people and all part of a team. This is the ideal which we all should strive for. The “9,9” communicator balances the job which needs to get done with concern for the people who are getting things done. When you use inclusive, open communication techniques and follow the communication up with positive action, you can get good and sustainable participation. Most of us are not there yet and we need to improve our overall communication style.

Slide 27: Improving Communication

How do we go about improving our communication? I do have some suggestions, starting with some structural improvements to the board of directors. Many boards bring up a nominating committee only when a board member leaves. Consider changing this. Good board members do not grow on trees and the board should be constantly searching for them, cultivating them to improve board stability and a fair rotation of ideas and a diverse mix of people. The nominating committee also needs to develop focused recruiting priorities which reflect the needs of the board and organization. You should have made a strategic plan early on; do not let it be a sacred text which only comes out on special occasions. The strategic plan should be referred to every few

months and revised when community conditions change to insure that your organization is on course.

Slide 28: Board Profile

Develop a profile of the current board. This profile helps you put the right people where they can do the most good. As the board changes, the profile will also need to be changed. This Board Matrix Worksheet from buildabetterboard.com is a pretty extensive example of a worksheet you can use to build this profile. Practice clear communication between everyone at all times, for instance clear up any role confusion by providing clear job descriptions (Manzetti, & Mehta, 2015). For an example of a Board Member job description, BoardSource.com has a good example.

You should expect your non-profit to be able to provide to all new board members clear job descriptions and other important information in a board handbook. You should expect to be in regular, clear and open communication with other members of the team. You should expect to be given a role and be responsible for that role while you let other members of the team do their assigned duties. You should participate in committees as needed, and you can expect the board to set term limits so that everyone understands that, while your time and experience are valuable, you are not expected to be in that role forever (compiled from dotorgsolutions.com). Board members should be open to training, at least as much as the staff should be. The world of non-profits is as ever changing as the world of business. There are many ways to provide the training which is needed to keep up. The executive director may have experience with the organization which outlasts any of the current board members, and if they have been doing the job for a while, they know a lot about the non-profit sector in which they are working. There are conferences,

programs, and webinars that can help you develop your board from consulting organizations like BoardEffect, BoardSource, NYC Nonprofits as well as consultants which specialize in non-profits. Creating a board of directors binder which gives all the important information to a board member in an easily searchable, easily referenced way is extremely important. Once they receive the binder, the board needs to be trained on what is in that binder, what the expectations are, and introduced to the culture of your organization. This training is extremely important, it allows board members to ask questions and can give the organization feedback on how concepts can be communicated better.

Earlier I mentioned conflict resolution and how once a conflict is resolved the resolution should be written down and every board member should have a copy in their handbook. The mission, organizational goals, rules of conduct and the procedures used to conduct board meetings, should reflect these agreements. If they do not, any board member should be encouraged to call attention to the offending issue so that it can be resolved before it becomes a bigger problem.

Improving communication also takes opportunity and practice. Be sure to participate in your organization in as many ways as you can. Stop by any facilities you have, talk to the people who work in your organization, get to know them and the clients they serve. In addition, consider social gatherings such as an all-staff meeting or board retreats.

Invite clients, colleagues, and other community members to present at events or board meetings about topics you desire to learn more about. Many other organizations would love to come and talk to you about inclusion of ethnic minorities and people with disabilities, veterans' concerns and many others. This can also help you to build collaborative opportunities.

Demographics are constantly changing as diverse populations move around. Your organization should have a plan for the future which should include a succession plan (Altman, 2016) in addition to plans which lay a clear course of action around the issues of a changing world, including appropriate representation of a changing population. Keep in mind that the rules of the corporate world are “seldom feasible or desirable” in the non-profit sector (Alexander, & Weiner, 1998), especially when you are looking to build a collaborative team. Since many people come in from the corporate world, they bring their ideas of how companies are run. Many companies run in competitive environments where even the employees and board members can employ aggressive tactics which run counter to building trust and cooperation.. Be careful not to let the stresses of fundraising and grant writing lure you into the for-profit mindset; this mindset makes you look at other non-profits as competitors when what you need to see are collaborators. My experience shows me that demand for funds is increasing while the number and size of grants are getting smaller, especially for small non-profits in rural areas. When you build coalitions you gain the ability to grow trust and show a larger impact to granting organizations who want to fund results driven organizations. Even when organizations form lucrative collaborations they still can find it hard to obtain grant money, so they may create retail opportunities to raise funds, such as ReStore for Habitat for Humanity, in addition to traditional fundraising events and annual donation request mailings.

As an example of what I’m talking about, the Aging and Disability Resource Center of Central Wisconsin has management staff who regularly attend board meetings where they are sometimes asked to participate in discussions and provide background on their jobs or the clients they serve. The board also regularly asks representatives from other agencies to visit and give

presentations, and occasionally asks legislators to attend so they can talk about issues which are relevant to the ADRC-CW.

As a further example of getting to know the people within your organization, when I ran the literacy organization, I asked board members and other volunteers to write up short biographies which I shared in the monthly newsletters. My goal was to bring people together through shared interests and experiences.

Most of all, remember that we are all people. We have lives outside the organization. We have hopes, dreams, concerns and preferences. Learn more about the people you are working with, share with them your own thoughts and feelings so that we can all help each other improve the lives of all of the people we work with inside and outside of the organization.

Slide 29: Guidelines

A good way to start developing your organization's positive culture is by following some healthy board communication guidelines (Eadie, 2014): The board (as a body and not as individual members) provides direction to the executive director and only the executive director. It is the job of the executive director to run the day-to-day operations of the organization, including supervising staff and volunteers. As long as the board hires an executive director, the board can focus its attention on planning and policy development, community and organizational development, and fundraising and support development. Lastly, any board member may request information from the executive director if it is easily accessible and the information is to be used in the regular business of the board of directors.

You should expect your non-profit to be able to provide to all new board members clear job descriptions and other important information in a board handbook. You should expect to be

in regular, clear and open communication with other members of the team. You should expect to be given a role and to be responsible for that role while you let other members of the team focus on their assigned duties. You should participate in committees as needed, and you can expect the board to set term limits so that everyone understands that, while your time and experience are valuable, you are not expected to be in that role forever.

Looking from the other side, the executive director can do things to help the board do their job better. The executive director makes sure the board members know what's going on at the organization through regular and clear communication through both formal and informal means. Communication with each other is more than just board meetings and training sessions. Do things together as an organization. Go to conferences, hold staff and board get togethers, and take part in something that's not work together once in a while.

This brings me to a very important point from my past. If your organization receives money from the public, including government funds, you have an obligation to be open to the public, including holding open meetings. When I ran the literacy organization, I was all about openness and transparency, but my last board of directors and my predecessor seemed to have a different idea. They were wrong. The more open you are, the more trust you gain. Besides, it's the law.

A real world example of meeting clients where they are is illustrated by some recent Novel Coronavirus advertisements on television. I did not know about these ads because the ads are inaccessible to the visually impaired. There is text on the screen with canned music in the background with no narration. Do they put descriptive video service on the second audio

program channel? Probably not, it is hard to find anyone that does that so many visually impaired people have given up looking for it.

As an additional example, in 2019 I attended a disabled advocacy day in the state capital with more than 220 people with disabilities and their advocates. I was the only blind person there that I saw, but then again, I don't see all that well anyway. However, nowhere did I see options to receive materials electronically, in large print or in Braille. Neither did I see any references to sign language interpreters, and of course everyone now knows that the capital building itself is not the most accessible building either. Don't let this type of thing happen in your organization. You should be as open as possible to the people you collaborate with and your clients.

Examples like these are why you need to get to know people if you are working with them or working for them. The more barriers you can break down, the better for your organization and your clients. It is easy to get to know people; you just need to take the time out of your busy day.

Slide 30: In Summary

We have covered a lot of ground; most of this presentation has covered things that you have already done or planned on doing in the future. I have talked about how the planning and organization documents effect your organization's communication and how the board of directors plays a key role in setting the tone for your organization's culture along with the executive director.

I have also discussed how increasing diversity within your organization helps you adapt to changing demographics and establish more effective communication with the populations you

serve. Bringing in people from your served population not only creates more opportunities for your organization, it opens up options for those your organization is trying to serve.

I've looked at how the board understands its role and the roles of others within the organization affects the communication and how management style changes the communication people use. I tried to show you that there are things which you can do now to help your organization become better at internal communication.

Lastly, I recommend setting aside time for special events or time at board meetings to get to know people, hear from your collaborators and your clients, and toss away the idea that "this is how it has always been done." The world is changing, and if you do not change with it, you will not only be left behind but you will not be effective in addressing the issues your organization exists to address.

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Appendix: Slides



1



3



2



4

Foundational Documents

- ❖ Mission Statement
- ❖ Statement of Vision
- ❖ Articles of Incorporation
- ❖ Bylaws

5

All on the Same Team



Image from StockXpert

6

Boards of Directors



Image from StockXpert

7

3 Functions of the Board

- ❖ Planning and Policy Development
- ❖ Community and Organizational Development
- ❖ Fundraising and Support Development

8

Board Expectations

- ❖ Donate Money and/or Time
- ❖ Volunteer
- ❖ Provide Professional Expertise
- ❖ Give Solutions not Suggestions
- ❖ Be Present

9

The Executive Director

- ❖ Receives Direction from the Board
- ❖ Runs the Day-to-Day Operations
- ❖ Trains and Leads Staff and Volunteers
- ❖ Reports to the Board of Directors
- ❖ Can Create Necessary Documentation

10

Staff & Volunteers

- ❖ Largest Part of Most Organizations
- ❖ Reports to the Executive Director
- ❖ May Communicate Very Little with the Board
- ❖ Does Most of the Client Contact

11

Plan for the Future

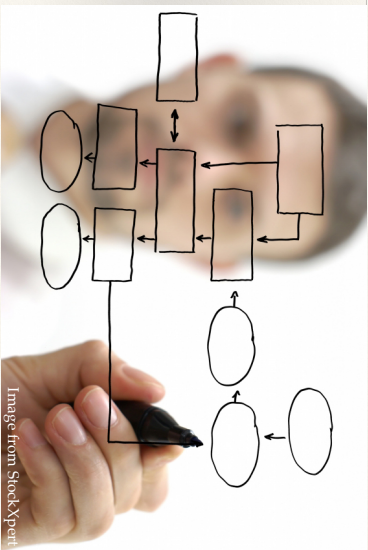


Image from StockXpert

12

Served Populations




Image from iStock

Image from iStock

13

Structure

- ❖ Board too Small
- ❖ No Nominating Committee
- ❖ No Committees

15

Barriers




Image from iStock

14

Preparation or Planning

- ❖ No strategic plan
- ❖ No Plan for Board Rotation
- ❖ No Board Training or Orientation

16

Attitude or (In)Action

- ❖ Temptation to Micro-manage
- ❖ Failure to Remove and Replace Unproductive Board Members
- ❖ Competing Against Other Agencies

17

Conflict



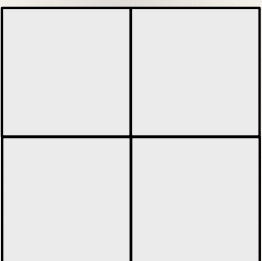
18

Culture

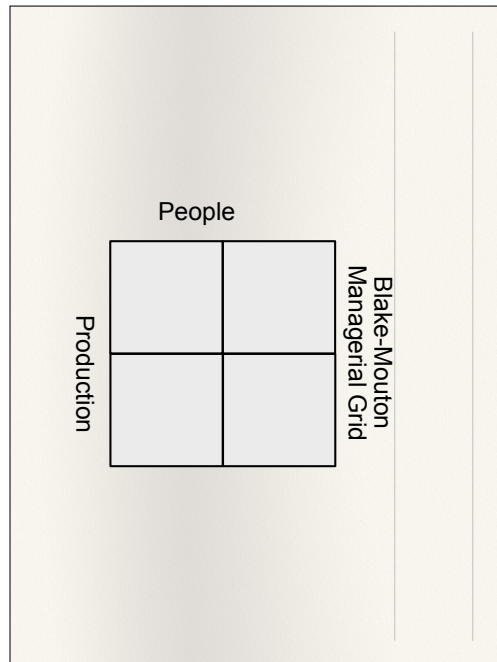
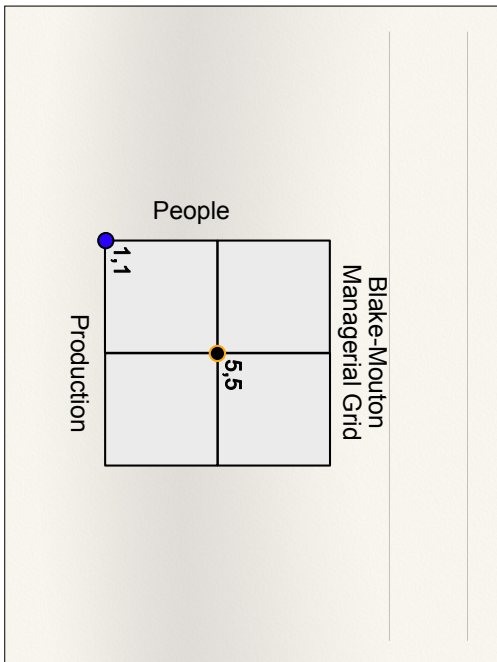
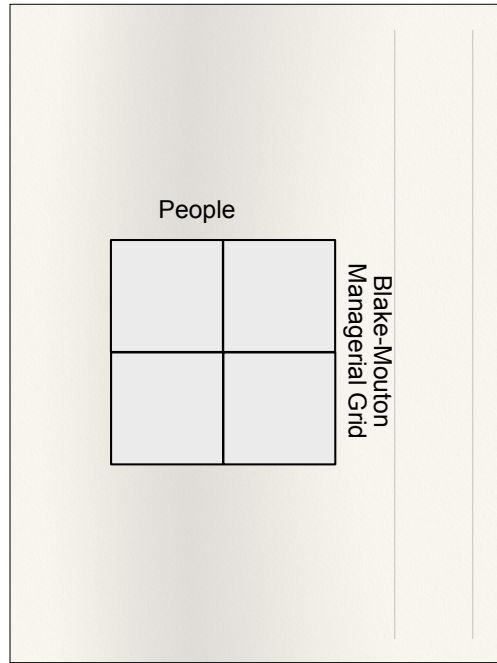
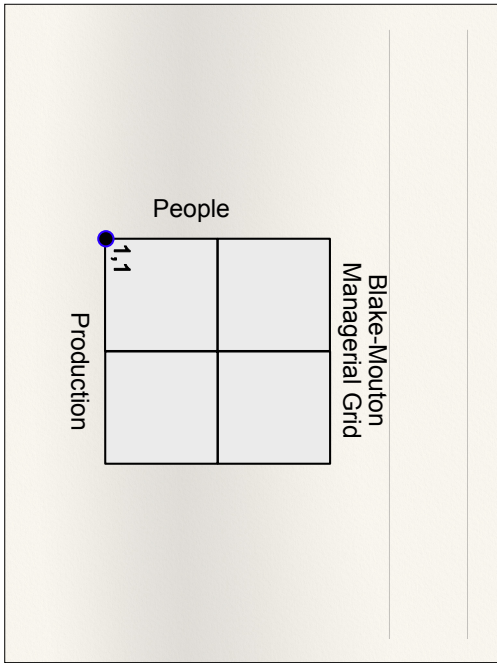


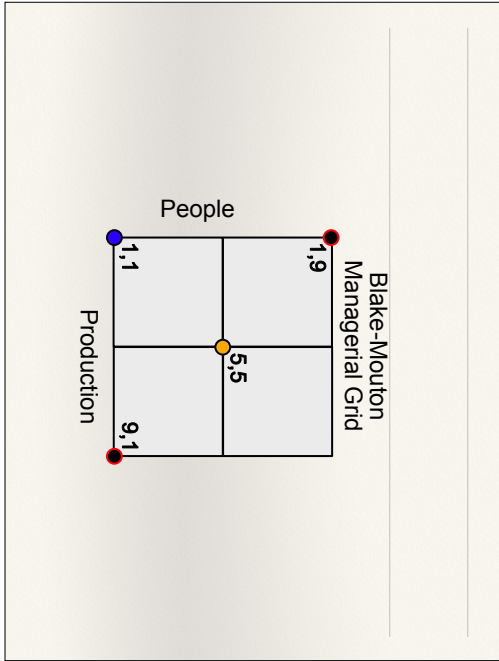
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Blake-Mouton Managerial Grid

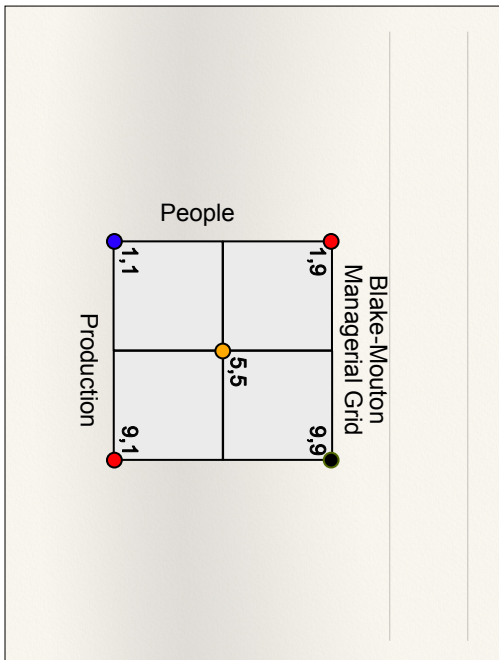


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25



26

Improving Communication

- ❖ Create a Year-Round Nominating Committee
- ❖ Review the Strategic Plan Regularly
- ❖ Create a Board Profile

27

Board Profile

Board Matrix Worksheet	# of Directors	# of Independent Directors	Board
Area of Expertise/Leadership Qualities			
Early stage organizations (start-ups)			0
Entrepreneurial spirit			0
Government assignment			0
Law			0
Marketing, advertising			0
Marketing, public relations			0
Organic growth			0
Physical plant (architect, engineer)			0
Product development			0
Understanding of community needs			0
Other			0
Resource			
Ability to give			0
Access to other resource foundations,			0
Availability for active participation			0
Additional notes (per setting)			0
Personal Profile			
Business organizations			0
Corporate			0
Media			0
Philanthropy			0
Social business			0
Other			0
Personal Profile			
Good communication			0

28

Guidelines

- ❖ Board Directs Executive Director
- ❖ Executive Director Directs Staff & Volunteers
- ❖ Request Only the Information the Board Needs to Perform its Function
- ❖ Executive Director Keeps Board Members in the Know
- ❖ Communication Between Board and Executive Director Should Occur at Board Meetings and Outside Board Meetings Regularly
- ❖ Don't Forget to be Social

In Summary

- ❖ Set a Positive and Inclusive Tone
- ❖ Learn About and From Your Served Population
- ❖ Be Open and Transparent
- ❖ Learn to Communicate Most Effectively to Diverse Populations
- ❖ Listen More than You Talk