Transforming Your Organization
from the Inside Out

How a small nonprofit boosted cooperation and communication by doing something simple — trusting the staff

By David Weiman & Kathryn Leugers

One of the central challenges of leadership is to engage staff as partners. Enlightened leaders know (and experts agree) that when employees are fully engaged, they form a powerful engine that drives the organization to its goals.

A number of things can stand in the way of meeting the challenge of staff engagement. For example, managers may adopt an authoritarian stance. Believing that "management knows best" can lead managers to issue orders to staff instead of involving them in processes.

Another obstacle can be a lack of agreement on basic issues, like goals, roles, and responsibilities. In this situation, everyone is moving, but there's no agreement on where they're going or how to get there.

Finally, poor communication can interfere with achieving goals, even if management is enlightened and everyone agrees on goals, roles, and responsibilities.

This article is about a growing nonprofit organization, Sunrise Community Center, which has met the challenges of engaging its staff as partners.[1] As you learn more about the organization and its challenges, you may recognize

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some problems and elements of potential change within your own organization. Perhaps you'll be inspired to help your organization overcome obstacles to goal achievement, and you'll learn some concrete steps to achieve your goals and make some changes of your own.

Growing Pains

Sunrise is a nonprofit organization that works to enhance the Pittsburgh community by developing programs for all ages, from preschoolers to older adults. Until the mid to late 1990s, Sunrise employed about 20 people. In those early days, a hallmark of their organizational culture was informality. There was a family-like relationship among staff and few formal rules. Communication seemed easy, and there were few "boundaries" to interfere with

cooperation across jobs. This close-knit, relaxed, flexible environment fostered the unity necessary for any organization to succeed. And Sunrise began growing.

As organizations expand, some things employees cherish most about the culture can change. For example, events such as staff meetings, which once occurred without much planning, now require more formal procedures, such as agendas, action steps, and follow-up methods. Such changes can stretch and distort communication lines.

Sunrise experienced those growing pains as its staff size doubled in the late 1990s and hired a consultant to help. The consultant's first step was to assess basic areas of functioning. He surveyed the staff about Sunrise's strengths and weaknesses. Were goals clear? Were roles and responsibilities well-defined? Were processes sufficient to meet goals? He asked staff members to reflect on their personal histories to identify what kinds of teams inspired them to work as a unit in the past.

Survey results showed a lack of agreement around things that had previously been tacitly understood.

For example, there was no formal consensus on values the staff had in common. Also, there were few agreed-upon ground rules for interacting with one another and no formal agreements governing how clients would be handled. These were the kinds of issues that had been informally understood in the past, but now, with a larger staff, needed to be re-examined.

A Meeting of Minds

Sunrise held an organization-wide retreat to clarify the challenges and frustrations staff members were experiencing and to carve out a vision for the future. To eliminate barriers to open communication, a few steps were taken:

- **At a pre-retreat meeting, senior managers made clear** that they wanted to hear what the staff had to say. Honesty was encouraged; there would be no consequences to speaking the truth.
- **During the retreat, the staff broke into small groups**, with managers and staff mixed together. Managers were told to avoid "acting the role" of managers in the groups.

These instructions helped people feel comfortable opening up. In the group discussions, people started to talk — about frustrations, concerns, feelings. They brainstormed about what values and principles they would like to have at Sunrise. At the end of the retreat, they outlined a list of ideas.

In creating change in your organization, staff-wide retreats and employee focus groups are an effective way to leverage the staff's knowledge.[2] It's important to be honest and realistic with staff in identifying the hoped-for outcomes of such a process.

Gelling as a Group

After the retreat, five staff members volunteered[3] to finish the work of creating a formal outline or "charter" to capture in writing:

- **values** they shared as an organization
- **principles** to guide how they would interact with one another
- **formal ground rules** for how

to treat clients.

As the five volunteers began their work, they decided to call themselves the Sunrise Charter Committee. Four ingredients helped the committee discover its identity as a group:

1. Support. Sunrise's consultant attended committee meetings for the first six months, giving support and feedback. Having a consultant at the meetings showed that the organization was invested in the change process and supported the committee's work.

2. Common Goals. The committee's primary goal was to create a written charter for Sunrise. Another

goal was to put the charter's words into action in day-to-day life at Sunrise. These goals were challenging enough to require hard work and specific enough that it was clear when they'd been accomplished. In addition to giving direction, common goals built group unity and trust.

3. Shared Leadership. The committee chose to be a "leaderless" group for several reasons: There was a sense that they were all equals in the group, and it would upset that balance if one of them took on the role of leader. They also felt that the work, including

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10 Tips for Creating Change in Your Organization

Every nonprofit organization faces challenges that require change. The success at Sunrise Community Center illustrates how to manage change by involving staff from the start. Here's a step-by-step guide to engaging your staff in the next change process at your organization:

1. Know your outcomes in advance. Clearly identify the results you're seeking. For example, Sunrise's goals were to increase trust and improve communication throughout the organization.

2. Create a feeling of urgency. Make sure everyone from managers to line staff knows that the change you're seeking is a priority. This urgency will spur action.

3. Get your managers on board early. Support at the top is key for change to be successful. If senior managers object to the outcome you're seeking, find out why as soon as possible and try to resolve those differences.

4. Seek staff feedback. Don't assume you know people's feelings about how things are going. Ask them through staff surveys and one-on-one meetings.

5. Create a group of willing participants. Ask for volunteers who are willing to work on the change process by forming a volunteer team. Getting volunteers (as opposed to "assigning" this work) ensures that participants are motivated to help.

6. Establish clear goals for success. Make sure the change management team identifies their group goal. For example, the goal of Sunrise's volunteer team was to write a set of values and principles to guide staff interaction.

7. Acknowledge small wins early. Give people positive feedback about decisions they make that help achieve the overall goal.

8. Communicate progress often. Organizations often under-communicate with staff, especially during a change process. Use e-mail, printed memos, and meetings to keep staff informed and interested.

9. Involve the whole staff in celebrating achievement of your goal. For example, when Sunrise's team finished the organization's charter, the entire staff attended a ceremony to read and sign it.

10. Once you've accomplished your goal, continue to reinforce it. Review it often in meetings with individuals, teams, and the entire organization.

leadership, would be more manageable if it was shared.

4. Personality Style. A final ingredient in the committee's success was the members' dynamic personalities. They were extroverts, passionate about making a change, and respected by their peers. Individuals with an internal drive for change, along with strength in connecting to others, can be essential in jump-starting any systems change process. Those qualities were abundant among the committee members.

Keeping the Energy High

One of the committee's challenges was to keep up the momentum generated at the retreat and persuade staff members that change was possible. The committee was successful because they valued staff members' input and let them know it. Committee members talked to staff informally, asked for feedback through e-mails and meetings, and used many ideas offered by employees.

On the one-year anniversary of Sunrise's charter, the group held another retreat. Staff survey responses indicated a strong interest in reviewing the charter at the retreat. Many of the original committee members now seemed ready to recruit new members to replace them. Sunrise's consultant met with them to reflect on their progress. All the committee members were invited to serve as peer mentors for new members, and all agreed.

At points of transition, putting more energy into communication and support helps move a committee to its next phase of development. The experience of past members sharing with new members increases interest and knowledge. Passing down traditions and history is a critical way to connect people. There's something powerful about the telling of stories that gives people a sense of continuity and belonging.

During the one-year retreat, staff members identified a host of benefits of being involved in the change process, including these:

• **They have** a greater voice.
• **They feel** like an integral part of a team.
• **They've gotten to know** other staff members better.
• **They have a greater sense of connection** to the organization.
• **They've been able to build** communication, teamwork, and leadership skills.

In addition, staff members noted ways the change process has impacted the organization as a whole:

• **Staff morale and cohesiveness** have grown.
• **The work environment** is more comfortable and fun.

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• **Employees** understand each other better and have more respect for each other.
• **Communication** throughout the organization is better.
• **Turnover** has dropped dramatically.

Lessons

This case study demonstrates the following management ideas:

• **The key to goal achievement** lies in engaging staff in a mutual effort.
• **Staff feedback** is invaluable for shaping an organization in which everyone feels valued and appreciated.
• **Involving staff** can be infectious. Excitement and energy build around the idea that employees can make positive contributions in pursuing organizational goals.

We hope this case study inspires you to engage your staff in pursuit of organizational goals.

As this article shows, such staff involvement can help an organization change and grow in a remarkably short time. ■

Footnotes

[1] This case study is true. For confidentiality purposes, the organization's name and location have been changed and some identifying details disguised. We have the organization's permission to tell its story. The first author served as a consultant to the organization, and the second author conducted extensive interviews and did research into the organization's history and growth.

[2] See these *Nonprofit World* articles (www.snpo.org): "Using Surveys & Focus Groups to Gather Market Data" (Vol. 13, No. 3), "Are You Using the Power of Assessments and Audits?" (Vol. 14, No. 3), "How to Conduct Focus Groups" (Vol. 17, No. 5), & "Seven Keys to a Successful Board-Staff Retreat" (Vol. 12, No. 6).

[3] Why did these five individuals volunteer? When asked, they gave three reasons: (1) a sense of inspiration by others' positive reactions at the retreat, (2) an eager desire to help create a change, (3) a wish to give staff a louder voice. One of these volunteers says, "The retreat lit a candle in us. I was not feeling positive and was weary coming into the retreat, and it might have been something in the way [the consultant] was talking that made me feel like maybe I can help make a difference or let people see what I see."

Resources

*Conrad, Charles, "Staying Healthy after Expansion," *Nonprofit World,* Vol. 15, No. 3.

Kotter, John P., *Leading Change*, Boston: Harvard Business School Press, www.hbsp.harvard.edu.

*McKay, Shona, "Building Morale: the Key to Successful Change," *Nonprofit World,* Vol. 13, No. 3.

*Starred publications are available at www.snpo.org/members.

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