It Takes a Village: Leading Inclusively

The Community Action Association of Pennsylvania (CAAP)

Overview

Gone are the days of top-down, "no questions asked" leadership. Today's workforces increasingly expect to be kept informed and to have a meaningful role in shaping the organizational decisions that impact them. This document supports organizational leaders in understanding leading principles of inclusive leadership and management and identifying tangible approaches they can use with their teams. The included resources can support inclusive leadership practices at both the team and the supervisory levels.

The content is based on La Piana Consulting's powerful *Real-Time Strategic Planning* methodology described in our book The Nonprofit Strategy Revolution; our extensive experience guiding nonprofit leaders to position their organizations for strategic, equitable, and sustainable impact; and research and tools developed by experts throughout the social sector, including from The Management Center, JustLead Washington, and CompassPoint.

Contents

Organizational / Team Leadership

In small teams, leaders can employ flat structures that minimize or even eliminate hierarchy and meaningfully involve everyone on the team in leadership. However, many teams and organizations are so large that some level of organizational structure is needed to carry out the work of the group. Often, in more complex structures (as well as those where leaders favor leadership by a small group or even a single individual), fewer and fewer people are directly involved in leadership.

While hierarchy can be an efficient option in some cases, such as the typical example of the military, it often provokes feeling disconnected, disempowered, and disengaged from organizational leadership and team direction. As a result, individuals may not feel a shared sense of accountability for the team's direction. Innovation and quality may suffer.

Decision-making and communications are two areas in which leaders can create a culture of inclusive leadership, even in very large organizations.

Decision-Making

Seek Out the Voices Who Will Enable Good Decision-Making

Inclusive leadership begins with an understanding that perspective and expertise do not solely reside within those at the top of a team hierarchy. The most effective organizations engage both those with direct experience with the work elements in question and those who would be impacted by a potential decision. These perspectives enable a clear understanding of situational context, creative possibilities, risks and potential mitigation approaches, and stakeholders' anticipated level of buy-in or resistance.

In many cases, the mere act of authentically inviting stakeholders to participate meaningfully in the process increases creativity and buy-in, and thus the chances that the best decision will be made and successfully implemented. However, common mistakes can derail attempts to include a broader set of voices in the process:

- **Performative Inclusion –** If leaders want feedback, they must be prepared to receive it and give it real consideration. Asking for input that is not actually welcome can cause irreparable damage to the trust of team leaders. Incorporate the input into the process and make clear how it was used or why it was not acted upon.

- **Exclusive Process Design –** People need context in order to participate fully. Dropping someone into a conversation without taking the time to provide the foundation for them to engage fully risks marginalizing those individuals and not getting their best thinking. Design a process that includes the time to provide training, materials, or resources to ensure all participants have the needed baseline of understanding.

- **Ignoring Power Dynamics –** Even authentic invitations to participate in a process can fail if those invited do not feel comfortable sharing their perspectives. While some power dynamics cannot be fully mitigated, careful process design can create the conditions for people to participate in ways that feel safe.

With a large stakeholder group, it can be challenging to identify who can best bring to the conversation a representation of relevant experiences and perspectives. Questions such as the following can help determine candidates for inclusion in the process.

- Who is accountable for this decision?

- Who can provide historical information about this issue?

- Who can share lessons from similar situations?

- Who can speak to how this issue is being addressed today?

- Who will be impacted by this decision? In what ways?

- What identities are missing from this process?

- Who needs to be involved in implementing or supporting this decision?

- Who might have concerns about this decision? Who might resist or try to block implementation?

Various methods can be used to involve people in the decision-making process. Each of these methods can be used at different stages, from assessment, to brainstorming, to making the decision, to planning the implementation and communication of the decision. Some of the more common methods include:

- Adding stakeholders to the decision-making team, committee, or task force

- Establishing advisory groups

- Interviews

- Focus groups

- Surveys or polls

- Team meetings

- Town hall discussions

- Physical or electronic comment boxes

Clarify Who is Accountable for the Decision and its Implementation

An important factor in inclusive decision-making is to align a decision with accountability. While there may be situations where the accountable party is not the ultimate decision-maker, an organization or team can take on tremendous risk if those with organizational or legal accountability for the decision or its implementation are not involved meaningfully in the process. A common example is an association where members vote to direct the board and staff to take action. Effective processes ensure that the accountable parties contribute to the information and perspectives that provide as comprehensive a picture of the situation as possible to inform the ultimate decision.

Develop and Share Decision-Making Criteria

Organizations with clear decision-making criteria are well-equipped to make better decisions. These criteria serve various functions, including:

- Aligning choices with an organization's mission, vision, and capabilities
- Including important considerations of those directly and indirectly impacted
- Preventing hasty decisions made under pressure
- Informing what information and perspectives are needed to make an informed decision
- Providing a framework to communicate the rationale for a decision to stakeholders

When faced with a choice, leadership should consider how each option (including keeping the status quo) addresses each criterion.

The criteria help inform decision-making and help to provide accountability and transparency but should not be the sole method of determining the path forward. Some choices may fall short in one or more criteria, but can still be worth doing. In those cases, additional conversation should determine whether to choose that path despite it failing to address all the criteria. Conversely, some items may seem to address each of the criteria, but may not be the best investment of resources. Update the list of criteria as needed to ensure its relevance.

We recommend that every nonprofit organization's strategy screen includes the first three criteria *(bolded below).*

Sample Organizational Decision-Making Criteria

- ***How does it help us advance our mission and vision of impact?***

- ***How does it build on, reinforce, or create a unique strength?***

- ***How does it positively advance equity and avoid amplifying or creating harmful internal or external inequities or oppressions?***

- How is it informed by the diverse perspectives and experiences of our internal and external stakeholders?

- How does it fit with our organizational priorities?

- Does it pay for itself (e.g., fees, earned revenue, sponsorships), or can we raise funds to pay for it? (E.g., is it compelling, relevant, and necessary enough to excite and motivate donors?)

- Do we have the capacity (e.g., staff, expertise, tools) to do this or a plan to add capacity?

- How will we measure short- or long-term success?

- Are we the best organization to take this on? Or are others more suitable?

- If we will work in partnership, is this a partner we want to have?

- How will our effort leverage bigger gains or impact?

Communications

Often, the first communication about a decision or its context comes once it has already been made by leaders, leaving many to feel the decision came out of nowhere. In an inclusive decision-making process, there are few big surprises as leaders provide proactive, clear, consistent, and timely communications about the status of the team and its work, potential decisions, and opportunities to provide input or ask questions.

Elements of a communication plan may address the following questions:

- What is the issue, project, or initiative?

- What background information or context should be shared?

- What decision has been made, if any?

- What action or decision is needed? By whom?

- What is/was the decision-making process? Who is/was involved?

- What information is needed? From whom/where?

- Who should receive this communication? What questions or concerns might they have that should be addressed?

- Who will draft this communication? Who will approve it?

- Who will share this communication?

- How will this be shared (conversation, meeting, email, memo, press release, etc.)?

- By when should it be shared?

Such a communications plan should both be part of any project or initiative, but also part of the conclusion of conversations or meetings. Where possible, create an archive of important communications (such as a bulletin board, electronic folder, or website) so stakeholders can easily reference information as needed.

Consider Changes to the Organizational Structure

Most of the suggestions above are situational. As a result, they rely on the discipline and intentionality of leaders. Teams and organizations wishing to institutionalize inclusive leadership may benefit from considering structural changes. These may include:

- Revising or flattening hierarchical management, supervisory, and decision-making structures

- Updating the position descriptions, qualifications, and composition of leadership teams

- Employing committees, task forces, or advisory groups

- Developing relevant policies, tools, and training

People Management

While a supervisor is only one person in an employee's work environment, they can have tremendous power to foster inclusive leadership with their direct and indirect reports. Not only can such efforts benefit the staff reporting up to a supervisor, but they can also aid the performance goals of the supervisor: the more a supervisor can tap into the perspective and expertise of their team, the more likely those employees and the organization as a whole will thrive.

We'll focus here on three aspects of inclusive people management: shared accountability, constructive feedback, and conflict resolution.

Establish Shared Accountability

Often, people think of accountability in terms of consequences for a mistake. However, true accountability is also about creating visibility and positive consequences when people perform as or better than expected.

Supervisors can benefit from considering four components of shared accountability:

- **Transparency**
  - What is the rationale for the request?
  - Why has this particular employee been chosen to carry out this task?
  - What support is available to the employee?
  - How clear are the goals and performance expectations?
  - What is the impact across the team or organization of successfully carrying out the task? Of failure to carry it out as requested?
  - What challenges must be anticipated or mitigated?

- **Participation**
  - Who is impacted by the task's success or failure? How will they be engaged in planning, decision-making, or implementation?
  - Who will be involved in carrying out the task? In what roles and at what stages?

- **Reflection and Deliberation**
  - How and when will the team check in to see if the work is on track? Who will participate in these conversations?
  - How will progress or changes be communicated during the task?
  - How will the work be evaluated for learning once complete?

- **Responsiveness**
  - How will changes or amendments be handled?
  - What elements are not able to be changed?
  - How can those carrying out the task request a change or additional resources?

Foster Timely and Constructive Feedback

A working relationship consisting of open, timely, and constructive two-way feedback opens up opportunities for both parties to collaborate and learn from one another. Such a relationship can also minimize hierarchy and the effect of power dynamics, especially when the supervisor is willing to listen and act on feedback from direct reports.

The following are tips for creating a culture of feedback in a supervisory relationship. Each of the items below can be modeled by the supervisor, while direct reports are also encouraged to provide timely feedback to the supervisor.

- Be clear you are looking to share feedback. You may also need to acknowledge that the intended recipient may not be able to receive the feedback in that moment and that you may need to schedule another time to share it.
- Share feedback as close to the event as possible so that the situation is fresh on each person's mind.
- Build systems for feedback, such as check in agendas, project debriefs, and onboarding milestones.
- Get to the point quickly. Don't bury the feedback after a lengthy but nonconstructive introduction.
- Recognize effort even if the outcomes did not meet expectations.
- Ask for feedback, even while giving feedback of your own. E.g., "How might I better support you?"

One form of feedback and leadership is managing up (as well as managing laterally). Supervisors that encourage and respond to their direct reports' efforts to manage up reinforce shared leadership, replacing their power <u>over</u> the direct report with power <u>with</u> the employee.

Managing up consists of seeking to understand what performance expectations, pressures, and constraints your supervisor is facing, and how they relate to your work.

- Clarify your own and your supervisor's strengths, weaknesses, goals, work styles, and needs
- Recognize that you are dependent on your supervisor and that team success requires collaboration
- Work to understand the big picture, not just the here and now
- Communicate proactively, keeping your supervisor looped in on your work and progress
- Match your strengths to your supervisor's weaknesses

Effectively Resolve Conflict

Many people try to avoid conflict, sometimes at great cost. However, effective conflict is an opportunity for building a trusting relationship and individual growth.

At its root, conflict results from unmet needs or wants and is often expressed as stress reactions. Constructive conflict, on the other hand, leads to understanding and commitment to shared goals.

Use the following steps to hold constructive conflict conversations:

- Prepare: Determine why dialogue is needed, anticipate their reactions, and create space to talk
- Describe the problem as you see it
- Describe how the problem impacts the experiences or perceptions of you or others
- Invite the other's perspective; listen quietly without arguing, justifying, or defending yourself
- Seek mutual agreement on the problem
- Collaboratively brainstorm solutions
- Mutually agree on a solution
- Clarify who will do what by when as well as how and when you'll check in on progress