# REALITIES

**A Diversity, Equity, Inclusion and Belonging Talent Management Education Series Brought to you by Nonprofit HR and partners!**

# Employee Engagement and Belonging Practices in Nonprofits

**WEBINAR TRANSCRIPT**

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# REALITIES: EMPLOYEE ENGAGEMENT AND BELONGING PRACTICES IN NONPROFITS

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Webinar Recording
Webinar Slides

How high on the scale would your employees rank their sense of belonging in your organization? It is not enough to assume that your employees feel connected and like they belong at work. The third-highest driver for voluntary turnover in organizations, 26.2%, was dissatisfaction and disengagement with the current organizational culture according to Nonprofit HR's 2019 Retention Practices Survey. Belonging is linked to increased job performance and can strengthen employee engagement. Understanding the extent to which your diverse staff feels a part of the culture is critical to your DEI efforts.

Discussion Topics:

- How to identify and address employee engagement differences based on employee demographic makeup
- New ways that employees may expect to influence, engage and be heard in the workplace
- How to create meaningful employee engagement practices aimed at fostering belonging

**#SocialSectorStrong**

## PANELISTS

**Melissa Phillippi**
Co-Founder & President
Performance Culture

**Beth Mack, Ph.D**.
Senior Consultant
Health & Wellbeing Innovations

**Antonio Cortes, PhD**
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Nonprofit HR

## MODERATOR

**Emily Holthaus**
Senior Advisor, Diversity, Equity & Inclusion
Nonprofit HR

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**Emily Holthaus:** Hello, everyone. Welcome to our session today. Thank you for joining us this afternoon for Nonprofit HR's Talent Management Education series. Today, our topic is Realities Diversity, Equity, Inclusion and Belonging. Our session title is Employee Engagement and Belonging Practices in Nonprofits.

My name is Emily Holthaus, and I know I've worked with many of you. I am the Managing Director for DEI at Nonprofit HR. As you may know, our team supports organizations of all shapes and sizes to integrate DEI into organizational culture and strategy to ensure equity throughout organizations. I'm going to be the host of your conversation today, so I'm really excited that all of you have joined.

I am really grateful that I am one of the first ones to announce something really amazing that Nonprofit HR is starting to do. This is a really special announcement, and you all are one of the first groups to hear about it. You may now listen to Nonprofit HR's events via podcast. You can head over to whichever podcast channel you normally utilize and you can search for The Switch by Nonprofit HR. This new podcast series that we have is going to be available on all major listening outlets. And, because you are the first to hear this, we want you, after this, to go on and subscribe and start checking out all the great episodes that we have available. We will also, starting this evening, have access to this on our website at www.nonprofithr.com/theswitch.

Thank you so much for joining us today, and I do have a few announcements before we jump in to help you better understand how you can participate and engage in today's event.

You've joined the presentation using your computer's audio system by default. You can also switch over to telephone if you need, just select telephone in the audio pane and the dial-in information will be displayed for you to do that. You'll also have the opportunity to submit text questions to us, the presenters today, by typing your questions into the questions pane of the control panel. You can send your questions to us at any time during the presentation. We are going to collect them, and then after we hear from each of our guests today, we're going to host a little Q&A session at the end. We will address as many of the questions as we can as they come in. Also to let you know, today's session is going to be recorded. You're going to receive a follow-up email within the next few days, and it will have a link to the recording. The recertification credits for SHRM and HRCI are being made available to the live attendees of the event only. Information about credits will also be included in the follow-up message and with that, let's get started.

I want to introduce our panel. I'm going to invite everyone to come back on screen, so everyone can see your faces as we introduce the team today.

We've got three really amazing guests with us that are all here to share their unique, and I'm going to say fascinating because I get fascinated by all the things that this group talks about, perspectives on engagement and belonging. Again, we will have time at the end, so each of them is going to get a chance to share with you a little bit. We'll have time near the end of this session to do the Q&A with our experts. You can see everyone's titles on the screen, and I'm going to introduce folks as they come on.

I'm going to start with Melissa Phillippi, she is a dynamic CEO and the Co-Founder and President of Performance Culture. She will be at first to share some insights with us. What is really cool about Melissa is that she's recently co-authored a publication with our own CEO from Nonprofit HR, Lisa Brown Alexander. They wrote together and co-authored on the topic of engagement and belonging. This was recently featured on www.hr.com, which was really neat. There was widespread engagement with that and we're actually going to send you all a link, so you can get a chance to see what they were writing and what they were talking about. Also, at the end, when we send out the resources, you'll get that as well as part of the follow-up. Melissa, I just want to thank your organization and you for sponsoring this event for us today. I'm actually going to give you control and turn things over to you so that you can begin your piece as well.

**Melissa Phillippi:** Thank you, Emily, I greatly appreciate that. Just for a little clarity on that, Performance Cultures has been partnering with Nonprofit HR for several years now, and we were really excited to sponsor this specific event. To get a little more granular on what the co-authored piece is that Lisa and I wrote together, it was actually on diversity, equity and inclusion in performance management. I'm really glad that some things have been brought to the surface in our climate today because it's something that we've needed to address for a while and we're actually going to talk about that. It's a great piece or article there that will be made available to you. I highly recommend it.

On screen, these are just some of the nonprofits that we partner with across the country. We do have a nonprofit case study that we can provide to you as well, so feel free to email us for that. There will be some contact information here a little bit later.

To give you guys a little bit of some baseline data on why this is important, I know probably a lot of the attendees that are listening already get this. I'm from the South, I'm in North Carolina here at the beach. If you notice the ocean, these are just things that you should already know, preaching to the choir kind of thing. However, if it needs to have a business case associated with it for your organization as you're presenting any potential changes, this is something to really hone-in on.

Bain & Company did this research actually back in 2015, still very relevant today, on how there is this employee pyramid of needs and this base level of being deemed a satisfied employee. To even be called a satisfied employee, you really did need to answer in the affirmative for these four areas: that you felt like you had a safe work environment; that you had the tools, training and resources to do your job well; that you felt like you could get your job done efficiently without excess bureaucracy, which is a big one; and that you felt valued and rewarded fairly. This last one really does go along with a lot of what the research that Lisa and I wrote about, as far as performance management. When it comes to whether an employee feels valued and rewarded fairly, a big portion of this will lie in your performance management practices.

This is something we're very big on; we're very big on calibration techniques, and we allow you to do that very easily within our system. When you have an employee that would answer in the affirmative all four of these, they are actually at that 100% productivity level. It's fantastic, you're getting back in productivity what you're, frankly, paying out, i.e. an employee's benefits and salary, workers

compensation and all those things. But, this is a base level and that's not really getting us to reach our mission and vision and fulfill those items and really take our organization to new heights.

On the opposite side, if we're not doing this, if we have a break in even one of this base-level pyramid levels, then we could have a potentially unsatisfied employee, which of course is at a net loss for us. We have to sometimes remember that when we are in HR, we are talking about the utilization of our human resources.

Above that level, is the level of engagement. We're going to be talking a lot about this today. I'm really excited for what my fellow panelists are going to be bringing to you today to really drill down to this because a lot of times, people have trouble with this bottom level, but if they can get above that, they're working really heavily on this middle layer. An engaged employee feels like they're a part of a great team. They feel empowered and not micromanaged. They feel like they have the opportunity to learn and grow, and they feel like they can make a difference and have an impact. The reason why everybody focuses on this is because of that productivity push. Now, we're in the money, so to speak. Not that it's about just that, we obviously are here to fulfill our mission and visions, but it allows us to be able to do that, to be mindful of our grand tours and to be mindful of all of our contributions that are coming in.

There's another layer that I don't hear talked about enough, frankly, in our field. That is the level of an inspired employee. An inspired employee gets meaning and inspiration from the company's mission, as well as the leaders in their company, be it senior leaders or be it managers that they view as a leader. We all hear that people will tend to leave their bosses before the leave their companies, and so that's what we're very focused on, a performance culture. Bain & Company's research shows that it goes through the roof on productivity whenever you have an employee that's an inspired employee, I think we all know this intuitively, but it's neat to see it broken down like that.

With that, I'm going to be turning it back to Emily so she can introduce today's feature speakers which I'm really excited for. I hope that you'll stay attune to everything and at the end, of course, I'll be back on to answer any questions. Please feel free to reach out directly to us for any further information. We do have discounts for nonprofits that go above and beyond the annual discount, so we take good care of you guys. Emily?

**Emily Holthaus:** Thank you so much for setting that foundation and sharing that. I love the last level of that, that's something to aspire to: How can we get our employees inspired and get them to that level of engagement within our organization? I appreciate you setting the stage for us, and we'll bring you back a little bit later when we get to the Q&A portion.
Now, I'm going to take a minute just to introduce our next two guests to all of you, they are going to spend some time on engagement and belonging with the overlay in connection to diversity, equity and inclusion in organizations. Our next two experts come, both, with complimentary experiences with engagement and belonging.

Beth Taylor Mack has over 20 years of experience in well-being and health care in nonprofit organizations. She has held positions and all sorts of areas: marketing, HR, administration, training and

organizational development. Her main passion is this idea of the connection between wellness and belonging and engagement. When she talks to you today, she will really be able to share all of her experiences while working with large healthcare organizations, overseeing healthcare systems and helping to really create workplace wellness that helps well-being and engagement for all employees in the organization.

Then secondly, I'm pleased to announce my Nonprofit HR team member, Dr. Antonio Cortes, is also with us today. He is our Senior Consultant for Equity, Inclusion and Diversity here at Nonprofit HR, he comes with over a decade of experience as an applied industrial organizational and business psychologist. He has actually conducted some formal research on engagement and belonging within the workplace, so I'm really excited to have both of them here to share their expertise with all of us.

 Antonio, I will give you the ball and you can share with everyone.

**Dr. Antonio Cortes:** Thank you, Emily.

I'm excited to be with everyone today and toggle a bit more about this topic that I've actually been, for more than 10 years, playing with. As Emily mentioned, I have done some research, I actually wrote a whole dissertation on employee engagement, the relationship between burnout and workplace flexibility and how all of those three topics interconnect with each other, which I believe was even more relevant today in the world that we're currently working in, as many of us are working from different places, in our homes, in coffee shops, or wherever we can find a spot with internet these days that might be semi-quiet.

Let's talk about engagement and belonging. To ground us, again, in just the concepts of what we mean when we talk about engagement and belonging, I just put these very brief and succinct definitions up on the screen. When we think about an engaged employee, we think about someone that's fully involved, enthusiastic and committed to the team.

If you have seen or have been an engaged employee, there's definitely a very strong energy that person will bring to the table when they're at work: they're happy to contribute thoughts in meetings, they're definitely sitting at their computer screens generating ideas, they're being highly productive. Melissa talked a lot about the differences between levels of satisfaction versus engagement, and then even beyond that, to being a highly-inspired employee. When we talk about engagement, it's not just average performance, it's not just coming and doing your job, it's this level of connection where you wake up and you're actually looking forward to going to work. You actually look forward to performing actions that get the organization closer to achieving the mission. For some of you, if you're thinking about your own organizations, if it's focused on older adult services, if it's focused on conservation, if it's focused on helping disadvantaged youth, whatever it is, the mission, you're waking up and looking forward to doing something that moves the needle in those areas.

Then, on the complimentary side of this, belonging is the feeling of connectedness enforced by a culture that you can purposefully create. The last two words are really, really important here. You can purposefully create a culture where your employees and your colleagues feel like they can bring their

authentic selves to work, or they feel like they have a lot of camaraderie and people that they can talk to, not just about work things, but maybe about personal things as well. If something happens in your personal life, maybe you want to share that with your colleagues. You bought a new house, or you're getting married, or you have a new family addition on the way, whatever the case may be. You like to share those types of personal experiences with everyone, so belonging at work and engagement have a very interesting relationship as we'll talk about here in a second.

But before we get to that, I want to pause and have you do some self-reflection and think about how well you are currently doing with engaging your teams. It doesn't matter what level you are in your organization, but think about this for a moment. What actions are you actually doing intentionally engage your employees and your team members and your staff? Can you think of things that you're actually doing?

The reason why I want to pause here is to give you a chance to actually, just truthfully, wherever you're at in your bedroom, in your office or in the car, think about, what am I actually doing at work to help people become engaged?

If it's not much, that's fine too. If you're doing a number of different things, that's what we want to hear. As we go forward, we'll definitely give you some examples of things that don't cost anything because I like to give things away for free, things that you can kind of go back and do, and have some immediate impact and some tangible insights on. We'll talk about some of those as we go through this and recognize that you can go well beyond the free things that I'll offer as suggestions by doing some more formal work in surveys, development and such.

Let's talk about the relationship now between engagement and belonging. I think that's an interesting one. Emily mentioned I'm all about the science and theoretical constructs of interconnectedness, but what we find in research consistently is that feeling of belonging at a company has the strongest relationship of engagement. I believe most of us today are probably pretty familiar with employee engagement as a concept. Maybe we've done engagement surveys in our organizations or participated in surveys over the years. Belonging is something that consistently, year after year, has shown a very strong relationship with engagement.

What that leads us to believe, then, is that belonging will also have a very strong correlation with business outcomes, like productivity and retention. I say, don't take my word for it, take the word of industry experts. Melissa shared some great information and insights on outcomes that we can actually measure. Well, there's a host of organizations like Gallup and The Conference Board, as well as independent industry experts, that for the last couple of decades have been amassing tons and tons of research and insights into the relationships of, if I have an employee that's significantly engaged, how does that impact things like performance, revenue, retention, utilization of sick days, my bottom line? Over and over, we have the same kind of conclusion that an engaged workforce actually has tangible value, both in dollars and cents of revenue, in retention and all kinds of other areas. If you can measure it, there's a relationship there, and the most fascinating thing that I've found is that there's a very high ROI attached to it. To mention one thing on screen here, I won't talk about all of them because I want to move on to something else that's a little bit more interesting, but your highly engaged employees are

87% less likely to leave the organization. If you can retain 87% of your employees, we already know, again, from other research that retention is a huge cost saver. It costs money to replace people, so all these aspects of organizational functioning that we actively measure on a regular basis can be positively impacted by retention and by correlation, to belonging and engagement. The more that we can focus on improving engagement, the more we can achieve some of these organizational outcomes as well.

I wanted to take a pause here and turn it over to Beth and let her talk more about the climate where we are today and some additional considerations for the concepts of engagement and belonging.

**Beth Taylor Mack:** Awesome. Thank you, Antonio.

I'm going to leave my camera off because I have copious notes that I'm going to present. I just wanted to make sure that I give that my full attention while not distracting from the presentation.

I just wanted to get some level set in relation to where we were, where we are now and where it is we would like to go. Remember the good old days of 2019? I sure do. Back then, as a matter of fact, Gallup ran their employee engagement poll and recognized, at least reported, that engagement was at an all-time high, it was the highest it's been since they've been tracking these numbers starting 20 years ago in 2000, and they highlighted specifically four features of what highly-engaged culture is and what highly-engaged individuals have reported. You can see here on screen that it really starts with an initiative from the top. It doesn't mean that the top people are necessarily leading it, but everybody's very clear on the organization having a well-defined purpose and brand, and everyone in the organization knows exactly how engagement connects to outcomes.

In addition to that, there seems to be this sort of shift in moving away from this top-down, boss hierarchy and really exploring more into the realm of coaching. What I appreciate about that is it gets away from that paternalistic system that we've had in the past and really engages and encourages teams to solve problems at the local level, rather than using that top-down command approach. What's great about this is that this is an essential tenant of anyone out there who knows what transformational leadership is, where teams are directly involved in change management, and it's, again, a shift in how businesses run and are operated.

The third thing is in talking about these high development cultures that practice company-wide communication. Communication seems to be still a challenge moving forward. We'll get to that in a minute, but we all appreciate clear communication, clear expectations and highly-engaged individuals in the workforce will comment that the communication is very fluid, very transparent.

Then, the last thing is holding managers accountable. What's clearly interesting here is what companies will do, they'll create high-value career paths for individual contributor roles. What used to be in the past is that's how you would advance in the company, that's how you would grow. You would have to become a manager, you would have to become a director. We recognize now that simply because somebody is a top performer doesn't necessarily translate to how that individual will show up in a leadership role, so a lot of companies are shifting the way they think about that.

Then, 2020 hits and here we go, with that comes a pandemic and then widespread social issues and civic issues that we've had to face. Nonprofits, as you all well know, have definitely not escaped the impact as everyone can attest. There was a recent research article that described some of the impacts at the organizational level, team level and individual level. Obviously, you've experienced these organizational impacts, including layoffs; changing of workflow; having people work remotely, unless they are essential workers or direct service such as those of you in health care and social services, frontline workers really can't have the opportunity to work remotely and so it's causes riff and in the workforce in general; health and safety, or those nonprofits that work in health care and how they're addressing that with their own employees. Some of the team-level impacts are, of course, absorbing additional roles and responsibilities because now the workforce may have decreased. You're having to work with smaller teams, but the workload is just as great, if not greater, because the need in the community is so great. Then, the individual impacts certainly include a lack of employee voice, employees have felt disempowered disengaged, a lot of questions regarding essential workers and even compensation, things like hazard pay has come up as an issue. For some folks, for sure, we don't necessarily need to drive our employee engagement through our mission and our community. Our employees are most likely very connected to the mission. That's why they work with us. That's why they're there in service to the community, service in others before self.

However, what's happened is, if that has shifted, if the nonprofit business model has shifted, if perhaps that also has meant a change in how the mission is carried out, some employees may feel a bit disconnected.

Gallup then conducted the survey this year. What they reported is that 54% of the respondents are now reporting being non-engaged and that was present with managers and leaders, so all staff at all levels. Obviously, there are a lot of other things that have come up beyond COVID and some of the reasons here, including all the societal unrest we've had in the wake of the killing of George Floyd and all the resurfacing of the diversity and inclusion challenges that we all know too well in the workplace that have always been present, but now it's really sort of caused that to bubble up to the surface and have a greater spotlight.

Unclear business plans. I mentioned before that being able to communicate effectively when we just don't know the future has been, obviously, a challenge, plus not being able to forecast and not being able to budget based on numbers for last year because we just don't know how it's being impacted. If shutdowns are occurring, when are those being opened back up, what are the ratios, things like that.

Then, another challenge, they didn't say that this was too highly-weighted, but that previously furloughed workers returning to the workforce had a bit of a feeling of disengagement because it caused a challenge of how they felt they were seen or valued in the workplace. Again, we all know that our employees really believe so much in the nonprofit cause, but it is just changing the way they've seen their value, whether they've been through the furloughed process, and then brought back.

One of the other things that was captured, or not captured, in the Gallup survey, and I bring this up because I think it's important, is that of preexisting health disparities in relation to systemic

racism. NIHCM, which is the National Institute for Health Care Management Foundation, reported that black people are dying or have died at a rate 2.4 times higher than white people. They also reported how inequities contribute to poor health outcomes that when compared to White Americans, Black Americans are more likely to face food insecurity, housing insecurity, a lack of wealth, lack of higher education and increased incarceration rates. A recent report this month from Columbia University noted that the pandemic threw an additional eight million people into poverty. And, of note, the most affected have been Black and Hispanic people, as well as children. This not only creates an additional strain from a population perspective on social services and health care services in our community, but also, from an employee perspective, think about the employee journey as they may be impacted by some of these numbers directly or through their family members.

Now, I do want to shift into the relevance of belonging, and we've talked about it, Antonio has laid out a little bit of a definition for us to work from. I pulled this quote that Brené Brown had stated. Brené Brown is a researcher, who does a lot of her work around things like empathy and vulnerability and courage, but she even recognizes that it starts with belonging and love. Specifically, I don't think it's an exaggeration how she relates this to our needs, and if they're not met that we literally will break. It is something that I feel very strongly about, and being that we are all social beings, we recognize that need, it's hardwired into us.

Another researcher, Maslow, I'm sure you're all familiar with Maslow's hierarchy of needs. You can see that this is an elemental component of us being able to reach our self-actualization, which is really our fullest potential. Reaching the best version of ourselves that not only is belongingness and love and intimacy super connected here, but also that the level just below that in terms of safety and security. Then, you can see even the next level, the very fundamental level, how COVID has impacted some of us from just our basic needs, such as food, shelter, housing and things like that.

Antonio had brought up the business case, so I'm just going to touch on the well-being case and really focus on some health and well-being measures. I wanted to start with a quote from Doctor John Travis, he was an early pioneer in the wellness industry, and he stated that connection is the currency of wellness. Understand that he truly is right, certainly within the last decade and certainly more so in recent years. We've all heard the term social isolation and its negative impacts related to overall well-being, such as musculoskeletal disorders, poor diet, increased risk of depression, lack of physical activity and other health problems. Again, NIHCM reported that before the pandemic, over one in five adults in the U.S. said they were often or always felt lonely or isolated and many reported that it negatively impacted their health and well-being with about a third specifically reporting it having a negative impact on their ability to do their job. Now we can see how all of this is really fitting in a fabric of challenges, how belongingness is challenge, how social connectivity is challenge and how it impacts our work productivity. Then, when we looked at the effects of COVID in the lockdown, people are not only not able to get connected to work colleagues because of various shutdowns and various reductions in workforce, but there's a lack of connection to family and friends, social groups, faith-based services, et cetera.

Another challenge is that we have nearly one-third of adults living alone, so they're only outlet for social connection might be their place of employment or might be these social clubs. Thus, we can see how this not only leads to an uptick in social isolation, but also additional mental health issues.

Then, we look a little bit more at social isolation and what that is, and it's usually a combination of several factors. From a research perspective, there's a few different surveys that are out there. Two of the most popular are the Duke Social Support Index (DSSI) and the UCLA Loneliness Scale, so we're just going to talk about that in a moment. But first, I wanted to just highlight some of the items that are on these surveys. We have one here, specifically related to the amount of time spent talking with other people at work or at school, or questions like do your family and friends understand you, do they ever help you in the following ways, such as listening to your problems. You can just get a sense of how this is woven into the concept of belonging.

As I mentioned, the UCLA loneliness index. Here are some of their survey questions and they ask individuals to rate these, so really, it's a measure of a true or false. For example, I feel as if nobody really understands me; my interests and ideas are not shared by those around me; no one really knows me; I feel shutout and excluded; and I thought this last one was interesting, people are around me but not with me. So, again, this is not an exhaustive list, but it just gives you an indication of how scientists are measuring this concept of loneliness in social isolation.

One of the measures that actually has been used in the Gallup-Sharecare Well-Being Index as well as the World Happiness Report is the Cantril Ladder and it's very quick measure. It's a metaphorical ladder and the rungs represent 0-10 and individuals are asked to score it twice: Which rung represents their best possible life at this time? Then, which represents their best possible life five years from now? The scoring works as 7-10 being thriving, 4-6 being struggling and then 0-3 being suffering. It's just been an effective tool to just show a quick litmus test of how people are doing at any given time, and it's been said that approximately one in four people are thriving, so it's not like the majority of individuals are thriving within the context of this measure as well.

We've certainly made the case of why it's important, but then if you wanted to even take it a step further and say, well, how does this show up in terms of measures for my organization that are critical? This is, again, taken from Gallup's most recent 2020 survey related to employee engagement performance. When they compare the top quartile with the bottom quartile, they found that those individuals in the top quartile had, obviously, greater difference in safety incidents and accidents at work and a lesser reporting of patient safety incidents, mortality landfalls, so that's in our large organizations related to health care. Then, they had a great increase in reporting of people, employees specifically, that had talked about their well-being, they were thriving, as a matter of fact. We can see how, in addition to strategies to increase one's happiness and well-being, what that looks like in terms of engagement. We know that those with social connections include an environment of trust, they have great social support and include an element of generosity and also gratitude, we know that gratitude is so important in our work and how that shows up for people too. It's critical that we have those things in place, even when we don't have some of the other resources that we've traditionally had, or have been really fractured as it relates to COVID.

In addition, a study from the Personality and Social Psychology Review, specifically highlighted two types of relationships to boost ones well-being and the ability to thrive. That includes one that support individuals through adversity by being a mediator to stress, as well as those that help the individual to promote full participation and opportunities for exploration, growth and personal achievement and so, that's just critical when we think about those relationships at work and how that factors into one's well-being. I know Antonio is going to touch on some more of those things later.

This is where I will turn it back over to my colleague, Antonio.

**Dr. Antonio Cortes:** Thank you, Beth. It looks like we've gotten to that point again when we talk about something I love to talk about: diversity, equity, inclusion, and the connection to everything that we're talking about here today.

When we talk about belonging and engagement, something that we actually had an active debate about as we were preparing this content was, what's the relationship between engagement and belonging? Does one come first, does belonging come before engagement? Does engagement breed and perpetuate belonging?
We kind of went back and forth on that for a little bit. Then, I stepped back, and I said, let me look at the research and figure out what the relationship between those two things are. What I found, something far more interesting, is that it doesn't really matter if belonging comes first, or if you work to create an environment where an employee could be highly engaged. A precursor to belonging specifically is diversity, equity and inclusion, and that's something that came through very quickly as I was looking at those lovely 50-60 page research articles on, let's pick apart certain things and dig into it from a research standpoint. Every single one was saying the same thing. Diversity, equity and inclusion has to come before belonging. To me, that's probably the more important part of this relationship because we know that belonging is highly correlated to engagement already. If we assume that's true, then we become farther up the stream here to say, what do we need to do to create a culture and environment where someone has the potential to feel belonging at work?

If you think about it, practically, let's pull up some extreme examples. If I identify or if I am a transgender woman, what will it take for me to feel like I belong at work?

If I am 20 years old, and I'm starting an organization that's primarily older adults, baby boomers, Generation X, what would it take for me to feel like I belong with people that are maybe 15-20 years older than I am in the organization?

You can pick apart various dimensions of diversity if, for example, I'm a new American immigrant and this is my first time in the country working with a bunch of U.S. citizens, what would it take for me to feel like I belong in the workplace? These are the reasons why we have to ask the question of if the environment is diverse, equitable and inclusive because I would really have a hard time bringing my authentic self to work, and I'm sure a lot of you on this call would feel the same way, if it didn't feel like I fit in there, if it didn't feel like anyone else there shared the same ideas or backgrounds as me. This is why we actually have to consider, and we would like to spend some time talking about the fact, that diversity, equity and inclusion has so many different facets that feed into these other things that we

ultimately want to get to, which then, of course, get to organizational outcomes as well at the very tail end.

Something else that was interesting, in terms of findings, was that trust and mutual respect for diversity of opinions and perspectives in the workplace is a foundational component for engagement. This is true for the culturally diverse workplaces that some of you may encounter and be a part of. Trust is a huge, huge thing as a concept, and then also building on that is mutual respect.

Then, another thing that we uncovered was that organizations that have a really consistent and strong reputation for being leaders in this area, when they're doing things like corporate social responsibility, if they're walking the talk of diversity, equity and inclusion, employees ultimately feel a sense of safety, that's another concept. Safety, trust, mutual respect. All of these things are interconnected, and they build on each other to ultimately create that environment where people feel comfortable and safe sharing things about themselves, bring in their identities to work with them, which they do already. It's just a matter of feeling comfortable and welcomed do so in a way that maybe is more open or more in line with how they would like to show up at work, as opposed to suppressing some other identities.

The other interesting thing, and I love the research on this topic, is that the correlation between belonging and engagement is higher for historically underrepresented groups. Let me unpack this one for you. Again, if we already believe, which I hope we do at this point, that belonging and employee engagement produce tangible organizational outcomes, what we find is for women and minorities of a variety of dimensions, people with disabilities, or diverse abilities, the more that those populations feel like they belong in the workplace, the outcomes are actually even stronger than the statistical averages that we've already shared.

Thinking about the ROI of having a diverse, equitable and inclusive workplace, and trying to become better at that, not only produces the same tangible outcomes that we typically would see with any other organizational effort to improve belonging and engagement, but it has even greater outcomes and positive impact for people that have historically just been left out of the conversation, have been left out of organizations or maybe just didn't feel like they truly belong in their places of work.

Hopefully that is helpful, but I do want to go a little bit deeper and provide some tangible examples for something I think a lot of organizations struggle with today, and that's the intergenerational workforce. Definitely, this is the component of the conversation when we talk about diversity, equity and inclusion.

One of the first things that I want to talk about is the differences between the generations. There are core components that we want to think about it as it relates to this topic, and then also potential strategies that we can use to help that particular demographic in the intergenerational workforce become more engaged and feel like they belong.

There are five groups here, just so you know, and I'll pop them up on the screen as I'm talking about them. The oldest segment of our workforce, which still makes up 1% of our employees nationally, is the group that we refer to as the silent generation, or the Greatest Generation and I definitely have a fond

appreciation for people that are in this age group. Some key considerations and characteristics of this segment of the workforce are that they are very civic minded in general, there are good team players and they place a high emphasis on process. I'll tell you, I think about my grandfather when I think about that descriptor, there's a way to do it and it's actually his way. That's just me joking, but they have a way to do certain things, there's a correct way and they want to follow the process and make sure they're doing it properly. They have a mixed proficiency with technology, and this is where the opportunity comes in for us for strategies that we can use to leverage their expertise. They have institutional expertise and sector expertise that is unparalleled., they've been in the workforce for potentially 30-40+ years.

Strategies that we can use to help this population become more engaged and feel like they belong in the workplace is to have ample access to training. Because for this group, competency is really the key driver of engagement. If they don't feel like they can do their job adequately, it's going to be very hard for them to feel like they can actually get engaged into the work and feel like that they're doing a good job. Make sure that their skillsets are continuously being developed even later into their career, so that way they can continue being effective contributors.

Now, that's a little bit different, it's similar but different, than when we talk about our baby boomers, which are our next popular generational segment, very big in the workforce though. Some key considerations for baby boomers are that they also bring an enormous breadth of experience to the table, so that's the similar part. The different part is that they most likely have very unique personal needs. Be thinking about families that have adult children still living with them, maybe because of the pandemic, somebody's lost a job and now you're back living with your family. Maybe they're caring for older adult parents in their household. Who knows what's going on? Maybe they have their own health issues that they have to deal with. The baby boomer generation is very diverse in terms of the makeup of the unique needs that various employees might have in this particular age segment because there's a lot of things happening right now.

Some strategies that we used to help this group become more engaged would be to increase role clarity, also help them visually understand how the organization is leveraging all of their expertise and help them become more aware of how their contributions ultimately impact the organizational functioning. Then, from more of an HR standpoint, we want to be a little bit flexible here and become more aware of the unique challenges that this particular age segment has because I think their challenges are that they're more diverse than the other age groups and I would say, they are also the most dynamic and fluid right now because it's still evolving as we go.

When it comes to Gen X, the forgotten generation, I promise I haven't forgotten about you, but they see themselves as the next in line to become the leaders of organizations, or some of them are just now starting to get their feet wet in the senior leadership roles. Some of them are definitely starting to grow impatient because the baby boomer generation is still pushing out of the workforce, they're still getting towards retirement age and some of them may not be able to retire for a variety of reasons. This sandwich group right here is trying to figure out where they fit in the overall organizational context and where they could potentially go.

Something that we can do that's tangible for this group is to provide them opportunities to continue learning and growing. Although they may not necessarily be advancing career-wise, some of them will be and some of them are, but training and development is actually one of the most important things that we can do to help keep Gen X advancing their skillset, their knowledge and their personal growth. We found some very positive feedback and outcomes related to this particular demographic and this aged workforce that contributes to our belief that this is actually something that's very tangible for them; helping them get their master's degrees, helping them finish their bachelor's degrees, helping them get a certification, those types of things.

Then, the millennials, those dreaded millennials, I am, myself, one of them. Something that's, again, interesting to consider for this particular age group is that they often prioritize making a visible difference in the world and having some type of purpose and contribution and how that specifically will align with the organization they choose to work for. As a millennial myself, again, I feel like this is accurate. I feel like my contributions to the workforce and to the organizations that I consult with, I'm in part helping you all achieve your mission more effectively and to me, that's personally gratifying.

To keep millennials engaged, it's definitely important to provide opportunities for corporate philanthropy, for career pathing, we're still on the earlier part of our careers, we're not into our mid-career point yet, we're just inching into that spot. So, where do I go from here, knowing that I still have 20, potentially 30, more years in the workforce. I've only been in it for 10-15 years at this point. Helping millennials see where their future is within your organization or within the industry, helping them figure that out, and what things they need to do to prepare themselves to take on more senior leadership roles to develop their skillset is definitely helpful.

Then, some of you are starting to also see Gen Z pop into the to the mix, making things even more complex, but also interesting and exciting at the same time. This particular group is now considered to be the most diverse and educated generation in the workforce today, more educated and diverse than the millennials. The reason for that is about access and just the change and shift to a global experience, both on social media and education with access to knowledge. Another interesting trend with this group is, although they're the most educated, they probably also struggle with role clarity and building professional relationships at work. That's the opportunity for us.

When we're talking about Gen Z and how we can foster engagement for them, it's about laying out the expectations of the roles, making sure that they're clear on what we want to do and how we're leveraging their skillsets for the embedded technology mindsets that they have. Then also, think about practical ways to help them build the relationships that work because this group is a little bit different when it comes to relationship building because they've done a lot of it via social media and not in person, so those social skills don't necessarily operate the same way as they do with the other generations. If we can think about practical ways to help them build relationships professionally, they will be more successful at building that sense of belonging, and ultimately engagement, in workplace. Practical things that could be done are infusing opportunities to engage with other colleagues in the onboarding process or matching them with mentors. Lots of different ideas that can be applied here, but those are some of the key considerations.

Something else phenomenal comes through here, and I've highlighted or circled the various aspects of everything I just talked about that more so relate to belonging. For the silent generation, feeling useful and needed at work contributes to belonging; for baby boomers, being aware of their unique challenges and responding to them in ways that are helpful to them will help them feel like they belong at work and that their personal needs are considered; Gen X, helping them continue to learn and grow if you're investing in their personal skillsets, that comes back in terms of organizational outputs; for millennials, career pathing, helping me see myself in the future in this organization, where they fit, that is very helpful; and for Gen Z, social interaction, you can't build belonging if you can't have positive relationships with your colleagues at work. I figured most organizations are grappling with the intergenerational workforce in a variety of ways, so that's why I want to spend a little bit more time from the DEI lens thinking about that topic.

For those of you who are wondering, where do I go from here, because we talked about a lot of different things, there's probably a couple of different things that you may want to start with.

First, the question: Are we assessing levels of belonging and engagement within our organization?

I definitely know some of you are. Some of you have, actively in our conversations if we consulted with you at all, told us about your employee engagement surveys and the results and the things that you're already seeing that are starting to trend over time.

But are you also assessing belonging directly? Is belonging measured as part of your employee engagement survey? Some do, and some don't. We definitely measure that as part of our equity audits when we do a culture analysis. It's about finding ways to do that, and if you're not doing this, just know that after this call today, there will be some resources that we'll be sending out to you via email that will help you measure, specifically, belonging in the workplace. This will be helpful for you, it's very short questionnaire, with only 10 questions, and it will help you get at the concept of belonging with here with your staff.

Another thing to question is, are you articulating the expectations about the behaviors expected that contribute towards these concepts?

If you think about belonging, do I feel welcome in the organization? Do you welcome new staff into your organization in a very consistent way? When they interact with other people, are they excited to meet them, share knowledge with them about the organization, learn more about them and what their role would be? Then also, just some potentially personal things, where do they live? What things are they interested in? That kind of thing. Are we encouraging our staff members to spend the time to do things that foster that sense of belonging which ultimately will lead towards engagement?

Then, role modeling, there in the bottom left corner in the box. Are we exemplifying those behaviors that we want others to do? Is the senior leadership team and the executive director or the CEO modeling behaviors that are visible that will foster belonging? Are they asking questions of their colleagues? Are they asking them how they're doing? A very simple, unloaded question and you'd be surprised the amount of information you might get back from somebody by asking them how they are

doing. The more often that we can model simple behaviors and actions to show our colleagues how this happens over time, it'll become part of the culture, and we'll be checking each other when we talk and build professional relationships.

That really leads to the last item, which is reinforcing that over time. This isn't something that happens overnight, but you can actually begin the process today. You can change the way that you work to connect and build opportunities for your employees and staff members to ultimately become engaged and inspired in doing their work. It takes time and it takes consistency, so it's about recognizing that you want to consistently, over time, assess where you're at with engagement and belonging; continue to articulate what those things mean for your specific organization, and how it ties to organizational outcomes; and continue role modeling them over time, which will get you to where it becomes part of the culture and ingrained and very easy to do. We'll definitely be giving you some more resources and tips on how to do those things and this is an example of one of the tips that we'll be sharing. It's very simple and costs you nothing in terms of dollars and cents, so your board doesn't have to vote on this one.

How do I create a sense of belonging? Connecting people's individual roles in the organization to the mission and the purpose and saying, you might work in finance, but that contributes to the organizational mission in this way. Communicate that in a very direct and clear manner. That's helpful for people to understand how their contributions ultimately have positive impact to the mission. If you're thinking about millennials, as an example, that's what I need to know to ultimately understand my connection from a personal standpoint and how I'm actually achieving something that's socially impactful.

Next, being intentional about inclusion. I definitely spent a little bit of time talking about the fact that DEI is a part of this, but an intentional part, it must be. Definitely, forming task forces and trying to understand who might not be included or present your organization. These are things that we want to do in a very intentional way.

Next, embedding it into the organizational culture. I feel like that on the last slide, we definitely talked a lot about that. You have to have a plan to do so, what will you tangibly do over time to sustain and foster an environment where people feel like they belong either very quickly or slowly over time.

When it comes to engagement, I wrote a whole dissertation about this first one, but burnout is probably the biggest issue right now, at this moment, that we're dealing with because people are overworked. They're potentially working from home under additional stress and they're not able to go on vacation. In a lot of cases, people are concerned that the risk is too great still and so, burnout is occurring. People are working too much, people have too much stuff to do or too many obligations that are conflicting. Mitigating burnout is a first step to ensuring that the potential for engagement exists because if they're burnt out, there's no way they can become engaged. It's impossible, physically impossible, because they have deficits that are not being met.

Building trust is the second one that I would call out. Again, building trust costs us nothing, in terms of dollars and cents, but it could cost us everything if we don't do it. Fostering a relationship with your

employees where they trust that if they make mistakes, but they're quick to identify the solutions to remedy that, those are great things. In my personal experience, I'll tell you, I grew a portfolio in about four or five years to a $20 million membership base, and I started from zero. In the first six months, I messed up big time. But I had the trust from my leadership team to say, okay, what's not going to work here, and how do we fix it? Then, coming back to the table with a revised strategy ultimately lead us to a place where we didn't imagine we'd be able to go. So, building trust is huge. When I talk about trust, it's really about, if your employees feel like they can do the work and try to be innovative in a way that's safe and recognizes that sometimes things don't necessarily work out, but you give them space to be able to work through that.

Then, the third one here, is celebrate contributions. It cost us nothing to recognize our employees, in a public way such as in our meetings, who have done something that is really moving the needle in the organization. Who brought on the big donor? Who was able to produce programs that were impactful to another segment of the population? Think about ways to celebrate and again, this will be coming to you, these are free things that you can do.

With that, I do want to turn it back over to my colleague, Beth, to give you a little bit of inspiration in how all of these things come in a nice little package.

**Beth Taylor Mack:** Thanks, Antonio. Yeah, I just wanted to say again how this all fits together, where is this being done and where is it being done well. We were thinking about who we can highlight as a leader who truly embodies this and has done a great job within their own organization to create this.

Hamdi Ulukaya is a CEO of Chobani, and I included a link to his TED Talk here. Specifically, one of the secrets to his success is really not to lead from a distance. We just talked about a lot of these concepts and specifically, he's quoted as saying that being shoulder to shoulder seeing people, working with them, understanding their conditions, understanding how they feel about the company, how they feel about the work, how the community reacts to it, is very much tied to the success of the business. He believes in investing in his employees, like Antonio just mentioned about celebrating. In his TED Talk, Hamdi urges companies to adopt this anti-CEO playbook that he's created and really start with practicing gratitude, noting that businesses should take care of their employees first. This notion of doing things by your employees and making sure they have the conditions for themselves, and for their families, and for their communities is not an expense. It's an investment in your own company, in your own people and in your own dream. He goes on to say every time you invest in your people, the return is 100 times greater than the expense. He says it's important to include community as well. He fosters a sense of community both at work and within the local communities in which Chobani operates, specifically in upstate New York and also in Idaho.

That was, of course, written and created before the pandemic, but during and throughout, he has really shown no signs of slowing. They've committed to shipping out food products that support individuals and communities impacted by COVID to the tune of one full truck of product per day, even though it's an increased workload for his factories, but nonetheless, people are certainly very engaged and highly committed to get that work done because they know how important it is. He also has founded the Tent Partnership, which can be located at www.tent.org. He's also brought other agencies on as partners,

but what this organization does is it encourages businesses to help integrate refugees economically into their new communities as employees, as entrepreneurs and as consumers. The business case here is to strengthen the workforce, drive brand loyalty, of course, so there's a bit of a business case for it, and obviously, consumers would then see the Chobani product name and feel a certain way towards it, but also to increase employee engagement. When you see others around you who are like you or have the same shared experiences, you can imagine that sense of belonging just continues to be fostered.

I'm going to re-introduce Emily to take us to the Q&A.

**Emily Holthaus:** Thank you so much. I'm going to ask all of you, if you can, to turn your cameras back on. We're going to spend a little time here just connecting and chatting. There's so much rich information was shared, and I know that we've had many great questions come in through the chat. I'm actually going to stop sharing my screen for a moment, so that the group can see us, and we can hang out and chat for a few minutes.

I did want to start with a question, all of you have had such amazing experiences in various places with inclusion and belonging and engagement. What do you see groups doing wrong or going wrong with this, and what can they do to potentially overcome some of those barriers to really do this well? Whoever has a great example, who'd like to jump in with that first question?

**Beth Taylor Mack:** Sometimes employers don't think from an equity standpoint who could join, let's say, a task force or a team. I've worked in organizations where they would say, okay, we want to put together a workplace wellness committee and invariably, it would be salaried people who could afford to take an hour or an hour and a half break in the course of their day to show up for a committee meeting. We were truly missing out on the voice of individuals who were hourly workers, we were missing out on second shift, third shift, weekends. For me, I think the biggest thing really is when you talk about if this truly is a transformative leadership style where you're working shoulder to shoulder with all employees, you really have to consider what that inclusive lens looks like and how that shows up in committee work.

**Emily Holthaus:** That's a great one. Antonio, what were you going to add?

**Dr. Antonio Cortes:** Yeah, I can build on that one spot in my mind. I'm thinking about an experience where groupthink was allowed to dominate particular teams. We had a brand development team that essentially looked at potential partnerships in the for-profit or nonprofit space, evaluating the reputational risks and if we wanted to align our organization with these. It initially started off as just a people, a group of marketing staff, and the issue there was that it was very focused and wasn't considering the other aspects of the work that was happening within your organization. Groupthink essentially is the issue that happens here when you don't have diversity at the table and so, we actually were able to correct that. We had representation from different departments, such as our legal department, our programs department, our strategy and innovation department, on top of the fact that we have our marketing and communication experts to look at different facets of potential partnerships and where the pros and the cons would lie. Once we have the diversity of representation and of

thought at the table, that had much more productive and fruitful conversations on, what is the actual risk? But also, what is the multitude of possibilities that exist?

**Emily Holthaus:** Yeah, I would also add to that. Once you bring those diverse voices to the table, let them influence and actually listen and make changes based on those new perspectives because it's one thing to say that you're going to bring some diversity to the conversation, but if they never get to contribute then it doesn't matter that we actually did it at all.

Melissa, I'm wondering if you have any great examples from the work you've been doing around this.

**Melissa Phillippi:** Specifically, when you're talking about belonging, and I got really excited with a lot of Antonio's slides, especially with the engagement piece on celebrating the contributions, one of the things that we are really focused on with a performance culture is having, obviously, a defined set of core values, but going a step further and operationalizing those core values. Get them to a little bit more granular level and to the acceptable and unacceptable behaviors. Then, a big piece that I think both Beth and Antonio hit on is that element of trust. We can try and we need to get it right at the top, but if we don't hold people accountable at all for those behaviors, when it's not okay, when we see something not in line, you can say anything you want and have whatever program you want at the top, but the employees towards the bottom of the organization are going to feel what they're feeling from their peers. Whether or not we're holding people accountable as leaders and managers, behaviors that are not in line with diversity, equity and inclusion are not creating a sense of belonging.

Recognize and celebrate those contributions, like Antonio said, when you see it. It's not just about being held accountable when there's something wrong, but hey, did you see what she did or when they celebrated someone in the room or they gave them a place to speak. That's a great example of what we're looking for here, painting a picture, celebrating those behaviors and holding accountable behaviors that are not in line.

**Emily Holthaus:** Melissa, I think I've seen that in my career so many times where we let an employee sit there that is operating counter to those core values that we say are so important. We let them stay there for years and years and you see all these superstars leave because they're saying, why is this still being allowed to happen here? Even one or two people that are operating counter can crush your ability to be able to build it and make it go forward and I've seen that happen many times. That accountability piece on both sides we want to celebrate, but we also want to make sure that we're keeping in check when things are going counter. That is super important.

I'm going tell the group listening, please continue to put your questions in and I'm starting to see some come through. Melissa, I actually have one specifically that was asking about the slide you shared at the beginning.

On the slides comparing the satisfied and engaged employees, what are some factors that may explain the positive relationship between engagement and productivity?

**Melissa Phillippi:** Well, if we go back to that slide, I think it really outlines, and I don't know if we can pull that back up. A lot was actually in line with what Antonio was highlighting too, and I'll invite my colleagues here to discuss that too when we get there.

By the way, Antonio, I'm in between the Gen Xers and millennials and we don't like to be called millennials, but we are not a Gen Xer. We feel like we have one foot in both generations.

**Dr. Antonio Cortes:** Yeah. I'm on the tail end there too of the millennials, I refer to myself as the wise millennial.

**Melissa Phillippi:** All right, this is a great slide here. Thank you for bringing us back up, Emily. We look at that level of engagement and, again, I think Antonio had some great research that he can speak to. I think so much of what we've been talking about with belonging really goes to this first element here on the left, they feel like they're part of a great team. I say a lot of times, tongue in cheek, you don't really show up at your work saying you're going to be the best average worker you can be today. I want to be on the average team. No, you want to be on the championship team, right? You want to be the winner. You want to feel like you're doing something that matters, so you really do want to feel like you are part of a great team. We use the performance values matrix, and our methodology, which is management models, has been around for decades and decades says, hey, performance matters, but so do those behaviors. If you're a part of a great team, you can also have a lovable slacker on the team, and it weighs down the team, so that's not okay either. It's not going to create a sense of belonging because it starts to actually erode away at trust that we were just talking about because, wait a minute, if we are supposed to be all rolling the boat together and you're letting this other person just get away with not doing their job, that means I've got to pick up the slack and what does that tell me? I think that also goes to burnout that Antonio was talking about too, that whole part of a great team, there's a lot of stuff going on in that.

Are we holding accountable performance, as well as behaviors, and are they being empowered and not micromanaged? This is something my team will tell you, I have really, really high standards. I have to really work on this because if it's going out there and it's got the Performance Culture name on it, I'm going to take that very personally but I have to let them go. Craig Groeschel is a leader that says, if someone can do it 50% as good as you, let them do it. It was really hard for me to do that when I heard that, but it's the only way you're going to grow and scale and, frankly, help them try to grow in that.

Again, I loved the circled slides, Antonio, that you had. They said how a lot of the intergenerational employees want to have learning and development. There you go, have an opportunity to learn and grow, and then feeling like they can make a difference and have an impact, which I think that went to the millennials piece too. However, you did see there was some form in all of your generational sectors there, there's something there for all on this level.

Antonio, Beth, anything you'd want to add to that?

**Emily Holthaus:** I'm going to throw another piece in from the audience, this is a real-time one that came in, someone that wants to weigh in here.

They're asking, how do you balance creating that space for improvement, but also at the same time holding staff accountable? It's that tension or finding where the sweet spot is in the middle, so I want to throw that into the conversation.

**Melissa Phillippi:** The way that we do that, and the way you do that, is with that performance matrix. I don't have that on here, it's on the website www.performanceculture.com, it's front and center. They are two independent constructs, the research has proven that was done in 2012, some academic research, that they are not correlated. We all know this. You can have a brilliant jerk in your organization. Everybody just got a name in your head when I said that, right? You can have performance independent from behaviors, you can have that lovable slacker. You do have to have very specific career pathing and very specific performance metrics that are held accountable and that are elevated through that career path. You do have to have those defined behaviors that we're also holding accountable through a number of different means that we can measure that. Then, you integrate that, in my opinion, into your performance management process because you have to inspect what you expect.

I'm sorry just wanted to jump on that because to us, that is the answer. Antonio, I'm sorry for interrupting there.

**Dr. Antonio Cortes:** Oh no, you're perfectly fine, Melissa. I would say, complimentary to that, I would never not hold someone accountable for something that's happening. I feel like performance management requires us to do that, and myself included. If I messed up or I did something and it didn't really work out the way we intended to, that's on me to own that particular item. But what's more important is really how we respond to that and giving the opportunity for employees to build on that learning because every time something doesn't work, you learn something that doesn't work to either address it or do it differently.

That's where the opportunity for engagement happens. Every time in my personal and professional life that something goes off the rails, if I'm able to correct that in a successful way and we're supporting each other to do those types of actions, that's where engagement happens because now I realize that I have the potential in myself to ultimately correct things, wherever they might be in the organization or within my work and own that process as well. Failing fast is how I like to refer to it. We just have to dig into it. Beth, I don't know if you have anything else you'd like to add to that.

**Emily Holthaus:** Beth, I've got one here that I'm hoping you can weigh in on that just came in.
You talked a lot about the overlay of COVID and how everything is so different in the environment and how we're actually able to achieve this.

Someone is wanting some advice. What can we do in this time to foster more of a team attitude, to build that trust, to build that belonging, to do those check-ins on personal well-being, now that all of our employees aren't in front of us anymore? We're remote or we have to be socially distant and we can't give someone a side hug or whatever we used to do. Any advice there about this new reality and how we can still really lean in here?

**Beth Taylor Mack:** Yeah, that's a great question. Obviously, it's dependent upon where you live, right now we are experiencing a very temperate fall up here in the northeast, but I think it's even encouraging individuals to lean on self-care. That looks different for different people, and so it's hard to do these virtual check-ins and ask how are you doing? But giving people the task, giving them the option of asking, what is going to work for you? Would a walking meeting be better? Or can we just get on our phones? We don't have to see each other, we can just be out in nature, you're walking in your neighborhood and I'm walking in mine. Doing these different things that get us away from technology is one of the things that we've learned.

I didn't share it with this group, but it was since 1985, there was a measurement done in 2017 that talked about only 7% of people have friends at work. That's shocking and sad and I think it's because we say we're connected, and I use that term with the air quotes, we're hyperconnected, but we're not really exploring what that looks like from an individual basis. We're not asking the right questions and we're not experiencing more to say, lean into your self-care. What's going to help you navigate this better? How can I support you? That journey is definitely individually based, no matter what.

I think there's a lot of those workplace wellness shifts that have started to look more into mental health. It used to be all about fitness and biomarkers, if we're doing workplace wellness, we'd better see a reduction in A1C, that measure for blood sugar. That shouldn't be an outcome, but it had been in the past and now, we're making that shift really more towards holistic health and wellness, including mental health which, again, looks different for different people. It's a matter of checking in with individuals, asking them to help shape and create their own personal journey, doing more outreach, in terms of definitely giving them the resources and support that they need and links and their community, but also just reshaping how we can connect with them in a different way. We can just do a walk and talk where we're just walking outside, we're getting away from this technology, we're still using it, but doing something differently.

I think that's going to be the big challenge moving forward. There's been such a shift in how we've heard how companies are now thinking, do I really need a high-rise building in New York City and to pay all that rent? Is this going to be a shift that happens permanently? Is it going to rebound at one point? That's the great unknown, and that factors into the communications issue, so I think that's the other piece too: Being as communicative as possible with employees to make sure that they are in the know just as much as you are on a given basis.

**Melissa Phillippi:** Yeah. I'd like to echo that because in performance management, I sit on a couple of advisory panels with, frankly, some of my competitors and we share what's going on, what we're seeing and we certainly have all seen an uptick in the usage of some form of one-on-one, we call them check-ins. I actually just had my COVID test before this webinar because I was traveling and had a little sore throat, by the way, it's negative, so I'm okay, but I've traveled on-site to two different locations to different clients. One of them is in health care, so they have been essential and are working still side-by-side. The other one, the week prior, is not and they are in technology, so they have been all remote, and then getting together for the management training with us was the first time they've been together since pre-COVID.

Both companies had been utilizing our check-ins, basically purely digitally and using it just to document some conversation. Now, in the absence of communication, at least something is better than nothing to best point. Especially in uncertainty, you may not have certainty, but you need to at least have clarity. No leader was ever fired for overcommunicating. But, in both cases, what we did was challenge them to, if they cannot be in person, try Zoom, what we're doing now, or GoToMeeting or something like that at least to see facial expressions and hear tone. That's best point about that technology. There's all that research about loneliness, how loneliness has really increased, even though we're more connected to best point. Then, for the one that was actually the health care client that we're working with, they said, well, we see each other every day. I replied, but you're seeing each other in groups and passing and it's on to the next patient versus taking a timeout and to best point about self-care. Let's take a time out and take 15 minutes every two weeks, that's really not asking a lot to talk. What are your needs? How are you feeling? What do you need to do your job and to have the tools and resources to do your job? That is going back, again, to that slide that we were looking at. We keep assuming that they're fine and that documenting our conversation in a technology platform, which clearly I'm a fan of, is going to do it, but it doesn't replace real belonging or real relationships. You have do that with conversations and if you can't be in person doing something like this, there's just never going to be a replacement for the human biology that were made up of.

**Emily Holthaus:** Yeah, and Melissa, what you were saying just now made me think about, how Antonio, you said at one point, you must be intentional, best believe you must be intentional.

I think about often, we're just trying to get the work done, trying to get the work done and you need to be intentional to carve out time for people to connect differently and to have the conversation about what they're doing or how they are. My world right now, as you know, my 10-year-old is on punishment because he was skipping his virtual classes, so that impacts my ability to work, all of that. Be intentional about carving out the time for those interpersonal connections that would happen organically when we're walking down the hall together or going out to the parking lot afterwards. We don't have those moments where we get to have that. How do you intentionally create that? Antonio, I don't know if you have any additional ideas about how to do that?

**Dr. Antonio Cortes:** I mean, there are tons and tons of ways to do that. I think the big thing that, as was listening to Beth and Melissa talk about the opposite ends of the spectrum, it's really about the balance of value of interactions and quality of interactions or frequency of interactions, and then the mode and the medium, or how you actually connect. That's different for everyone, some people prefer a phone call, and I'll tell you, I miss in some ways just having a regular phone call because I used to be on the phone all the time, prior to COVID. I wouldn't have to have video calls all the time, I'm not opposed to them, but it was just nice to be able to lay back in my seat, not have to worry about if I have drool on my face or something and just have a nice conversation with somebody. You miss the weird things like that, so for everyone, it's a little bit different. Some people, they want more screen time. For me, right now, being a newer member of Nonprofit HR, more screen time is actually better to make those connections because I can get to see people, connect faces with names, learn body language and things like that. Whereas, we typically do that all in person, so a phone call is the great alternative when you spend a lot of time in person with people. I think it's just trying to figure out the balance and what

works for your organization, where you're at and also the people that you have there because everyone has different preferences. It's a little tricky, but it can be done.

**Emily Holthaus:** I love that, and I was thinking about with a phone call, you can actually go outside or sit and leave your environment too, it allows you to get out of whatever your space is. Mixing it up is probably really important. We've got a question that came in around belonging, and I'm actually going to put your slide back up here in just a second, Antonio.
This person was asking, what are some tangible ways that you assess that feeling of belonging? Belonging is difficult because it's not about what we do, it's about how that person feels, and the feeling of belonging sits with them, so how do you actually assess it? Is it specific focus groups we do or survey questions we ask? Talk a little bit about that, and I'm going to bring the slide back up where we were looking at that as well.

**Dr. Antonio Cortes:** Measuring belonging is actually a lot easier than you would conceptualize it to be. In a lot of our surveys, belonging, specifically, can be captured with just three questions.

Examples of them are: Can I bring my authentic self to the workplace? Do I feel like I have positive relationships with my colleagues? Do I feel like I can contribute ideas to the organizational function and actually be considered in decision making?

Think about what fosters belonging and then ask questions about it. Focus groups are great because you can actually get into the dynamics of, how does it feel to work here? Do you like working here? Do you like your colleagues? Do you know very many things about your colleagues outside of work? Do they know things about you? You can get into all those types of kind of rabbit holes.

In assessing belonging, I promise you from a statistical standpoint, three questions is all it takes. That can be embedded into an engagement survey, some engagement surveys actually already do embed it just because it's so strongly correlated with engagement. If any of you are using third party vendors for engagement surveys, I would suggest you ask them if there's a specific index on belonging that's embedded into it. Some of them will definitely already have it, I know we do with our organizational survey. For measuring it, you can do it via survey, you can do it via focus group, but the big thing is, do people feel like they can actually see themselves in the workplace and feel like they're comfortable sharing their ideas and perspectives in a way that's free and comfortable. That's what we're really trying to get at.

**Emily Holthaus:** It's funny too, I'm the operations person and I say, ask your people.

When you're doing your one-on-ones, be very fair, and just say, I want to know how you feel, do you feel like you probably belong here? Are there things that I can do as your supervisor to help you feel more connected and engaged?

Again, for everyone, the answer to that is going to be different and I think you need to know your employees, know what motivates them and what's important to them. We don't often ask these things,

but why don't we? It should be something that we do on a regular basis. Melissa, I see you shaking your head, how would you answer that?

**Melissa Phillippi:** Well, I was just thinking that I love those three questions. I was thinking also about something else, I believe it was Antonio that said it or maybe it was Beth, about the underrepresented group. You ask the majority in an organization how they're feeling or you have a survey where the majority is already in a majority, right? They answer yes, I have belonging, or yeah, I feel great and I'm represented. At Performance Culture, we use DiSC.

There's a lot of other workplace style, personality style or communication style assessments, but I always say the most extroverted caffeinated of us in the room is generally going to take over anyway. Maybe specifically asking, to your point, Emily, a group that you know is an underrepresented group in your organization, or different minority sections of your company, what they feel because if they feel like they belong and they can answer yes to those questions, as Antonio was saying, in a positive way, then we may be getting somewhere.

**Dr. Antonio Cortes:** Yup, and that is one of the resources to that's coming. There's a 10 question, true or false thing that we'll be sharing out with you, that it measures belonging, safety and I think connectedness. You'll see it coming through though, and there are, like I said, just three or four questions in there that are specific to engagement, so you don't even have to think of the questions, we'll send them to you.

**Emily Holthaus:** Excellent. This is great discussion, and we are almost out of time, but I do want to end with each of you getting a chance to answer this last question.

Where should an organization begin if they want to get on the path to strengthen their employee engagement practices, their ability to drive belonging with that equity and inclusion. What's the starting point? Beth, I'll let you start.

**Beth Taylor Mack:** Sure, yeah. That's a foundational, or the keystone, of all this is trust, and I think that's the big challenge we face right now. It is maybe a lack of trust, not for any other reason than just the bottom has fallen out. We don't know if the shutdown will come back and there's going to be a search for that means for business goals. How am I valued if I've been furloughed before? It makes me think when Melissa was talking before, Simon Sinek did a piece with Navy seals, and it was performance versus trust. He noted that your top performer who has very little trust, they need to go. Brené Brown would say the same thing. The only way we can show up and be our authentic self and be vulnerable, to Antonio's point, is that safety there and with safety comes trust, so that's the only way we can really show up. I think that there's going to be a litmus test right now about, how is your trust in your organization and how might that be a keystone of where you need to start?

**Emily Holthaus:** Thank you!

**Dr. Antonio Cortes:** I would say, to build on Beth's point, you really just have to know you are at today, so assessing your levels of belonging and engagement in your organization is where I would like to

start. That's probably how we start most of our engagements with our clients too. I don't jump in, I don't do training and tell you that you need to do this, I need to understand what's currently happening in your organization. I feel like that's a great place to start, just start to measure it if you're not doing it already.

**Emily Holthaus:** Melissa, how about you?

**Melissa Phillippi:** Yes. I agree wholeheartedly with what both Beth and Antonio talked about. We've actually got a second book coming out for building better teams for better results.
Every time I try to write about this stuff and try to point out some other areas to highlight where we might be able to focus on, I keep coming back to the top leader. An organization is only as healthy as its top leader. If leaders aren't leading the way, if they're not leading by example, if they're not then holding their senior leadership team accountable to high performance and great behaviors and trust, if they're not pouring into them and expecting them to pour into those below them and cascade this down, none of it matters. It has to happen at the top, and it has to happen consistently because consistency builds trust to best point. To me, it's always at the top. You have to start there.

**Emily Holthaus:** I agree 100% with all of you all.

I want to bring the contact information up for all of us here, so that if the leaders who are listing want to learn more, they know where to find you all.

I just want to extend an amazing thank you for all of the knowledge that you've dropped on us today. All three of you just brought something really unique to the table. For this discussion, there's plenty of questions we didn't get to, we could have spent a lot more time here, but it was really fascinating conversation for all of us today. Thank you all for your time, and we're going to turn to close up for today. I'm going to just end it with a few announcements that we have.

Remember, after this is all over, we will be following up with all of you, so that you will get a chance to have all of the resources we talked about, the connections to Melissa's article and I have some support pieces for you along with the recording of the webinar. That will all come out.

I do also want to let you know that if you're sticking with us with this series, we have a really awesome one on another topic coming up called Leadership and Culture in Nonprofits and that's going to be on November 19th. We have a pretty amazing secret guest that I can't disclose yet, so get on the website and keep checking in because we have someone really cool that's going to come and join us for that one as well.

Then additionally, there's something really neat going on tomorrow. There's a special webinar that we're hosting called, The Impact of Everything: No Ordinary Crisis. It's going to be focused on leading through this crisis fatigue. Beth, you talked about that a little bit today, about how that's where we are. Information for both of those webinars can be found on Nonprofit HR's website. Also, when we conclude the call, there'll be a little pop up that gives you a little survey. Please fill it out for us, let us

know how we're doing. We always want to be on the path to improvement, so just let us know how this was for you.

As always, we're here for you. If you need us, you know where to find us. Look for us on www.nonprofithr.com. You can email us directly at info@nonprofithr.com, or visit us on the web and like we said earlier, just to remember to sign up for our cool new podcast too. That's another way we want to stay connected with all of you. Thank you for listening. Thank you for sticking with us. Again, a huge thanks to the panel, and we'll see you all again next month. Thanks, everybody. Thank you. Goodbye.