

#SocialSectorStrong

WEBINAR TRANSCRIPT

**UNLOCK THE POTENTIAL
OF YOUR SOCIAL
ENTERPRISE'S PEOPLE**

UNLOCK THE POTENTIAL OF YOUR SOCIAL ENTERPRISE'S PEOPLE

The social enterprise ecosystem is a vibrant example of how impactful missions can be when the investment in people is prioritized. The success of this emerging fourth sector proves that when leaders are dedicated to their people—to their growth, development and fulfillment—their return on that investment is greater mission impact. Recognizing even more impact means that social enterprises must now unlock the potential of their people, and this winning strategy must be collaborative. If you are a social enterprise leader of a start-up, growth creator or an established organization, it is paramount to lay the structural and cultural groundwork within your organization to maximize the potential of those passionate people you brought on board. Join this conversation and hear how to harness your people's potential and learn about the Aha Effect.

Walk away knowing how to:

- align your social enterprise's purpose, mission and vision while maintaining your people as a focal point;
- apply/codify the tenets of leadership in service to the people who choose to invest their time, skills and passion in your mission; and
- build an intentional and collaborative culture that attracts and retains high-performing talent.

SPEAKERS



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Alicia Schoshinski: Good afternoon everyone, and welcome. Thank you for joining this afternoon's Virtual Event from Nonprofit HR. Today's session is entitled Unlock the Potential of Your Social Enterprise's People.

My name is Alicia Schoshinski, I'm the Managing Director of Talent & Development at Nonprofit HR and I'll be your moderator for today. We have a lot of great content to cover, so let's jump right in. But before we do, I would like to go over a few items so that you know how to best participate in today's event.

You've joined the presentation listening using your computer's speaker system by default. But if you would prefer to join over telephone, just choose telephone in the audio pane, and the dial-in information will be displayed.

You will have the opportunity to submit text questions to today's presenters. You can type your questions directly into the questions pane on the control panel. You can send in your questions at any time. We'll try to answer some questions during the presentation, but we will definitely have time during the Q&A at the end.

Today's session is being recorded and you will receive a copy of the slides and the deck within a few days following the presentation. Today's session is being hosted by Patty Hampton, Chief Social Impact Officer for Social Impact Talent Advisors by Nonprofit HR, otherwise known as SITA by Nonprofit HR. In fact, Patty is also the Managing Partner of Nonprofit HR. Then, we also have Tracye Weeks, who is a Team Lead and Senior Consultant for Nonprofit HR. You'll have plenty of time to connect with our presenters today, but let me tell you a little bit about their backgrounds first.

Patty Hampton is the creator of the firm's social enterprise collaborative SITA by Nonprofit HR, for which she serves as the Chief Social Impact Officer and spearheads multiple strategies and business initiatives. Also, in her role as Managing Partner, she co-leads the firm's business and financial strategies and is a member of the Senior Management Team. Innovation is a personal core value of Patty's and it has helped her shape SITA. Her expertise includes executive recruitment and consultation services, developing and delivering training programs, and facilitating focus groups that result in an enriched employee and supervisor relationship as well as an engaged workforce culture.

Before joining Nonprofit HR, Patty served as the Director of Human Resources with ASAE, the Center for Association Leadership, formerly known as the American Society of Association Executives. A trusted advisor to social entrepreneurs on the East and West Coast, Patty also serves as a board member for the Social Enterprise Alliance.

Unlock the Potential of Your Social Enterprise's People

Our other presenter is Tracye Weeks. Tracye is a resourceful and results-oriented human resources professional. She provides daily value to clients and areas of thought partnership, HR strategy, leadership coaching and training, and implementing best practices for creating high-performance organizations.

Tracye often serves as the interim HR leader for clients, who value her unique approach and creative solutions to solving organizational challenges. In these roles, Tracye advises leaders on strategy related to organizational structure, policies, risk assessment and aversion. Additionally, she enjoys managing creative initiatives that fit into the bigger picture, long-term organization goals.

Over the past 15 years, Tracye has supported both for-profit and nonprofit organizations in strategic planning, oversight and people relations. Her creative problem-solving ability has helped save organizations over one million dollars in operational spending by implementing solutions that are not only effective but also efficient. Tracye is the former HR leader of a Fortune 500 company as well as of a leading educational nonprofit.

Again, you will have an opportunity to ask questions throughout the webinar, and certainly during the formal Q&A session at the end.

Without further ado, Patty, I'll hand this over to you.

Patty Hampton: Thank you so much, Alicia. Tracye, we are on, on, on.

Tracye Weeks: It's us!

Patty Hampton: Thank you so much, everyone, for joining us. Just a bit of a commercial here, if you will, SITA by Nonprofit HR was founded in 2019. We are a collaborative that exclusively serves the social enterprise community. We are backed by our parent company that offers 20 years of serving the social sector as a trusted advisor and thought partner.

We also provide total lifecycle solutions for people management and direct partnership with social enterprises, including foundations that provide services to the social enterprise community, social incubators, B corps and also impact investors. And, of course, we are a woman-owned organization. Our vision is really simple. We are the first global talent management collaborative that is exclusively designed to support the HR and people needs of the social enterprise ecosystem or community. Thank you so much for joining us.

This is what Tracye and I are going to unpack for you today. First, why human potential is key to the success of your social enterprise. And remember, we will give you definitions around that, so we're talking to social enterprises that are for-profits, nonprofits, B corporations and also hybrid organizations. We're also going to talk about alignment with purpose, mission and vision; tenets of leadership; building an intentional and collaborative culture; and, the Aha Effect, one of my favorites.

All right, let's get started.

Tracye, I know you're excited, just as much as I am, to talk about social enterprises. We already have stated that we're talking to folks on the call that are for-profit organizations, nonprofits, B corps and also hybrid organizations that work in the social enterprise community and ecosystem.

The number one thing that I really want to talk about and touch on to give our talk some context is more around the organizations that have a formal talent management strategy or plan that will guide and has guided its work in 2021.

If you look at the slide, Nonprofit HR's Talent Management Priorities Survey, and Mishka, of course, will put the link in the chat for you if you'd like to download the entire survey.

In the survey, 28% of the people in the organizations that we surveyed actually have a talent management strategy in place. If you look at the number in the middle, 63% do not have a talent management strategy in place. So, that's telling, very telling.

And from Tracye's perspective, I'd love for her to just share a little bit about why she thinks that's important to have a talent management strategy because she's serving as our consultant. And so that 63%, Tracye, is really high. What do you think some of the areas are that are causing that to be so high and continue to be high over the last three years that we've done the survey as well?

Tracye Weeks: Yeah, so what we know about small businesses, nonprofits and especially social enterprises that don't have a lot of what we call "people capital" is that we're focused on the mission and we're focused on getting the work done.

What we don't focus on in that time are the people that are doing the work, the talent management strategies and, specifically when we're creating strategic plans, our budgets, our focus, all of our resources, are going to accomplishing that mission. And what I see organizations fail to create are internal strategies that focus on people. One of the main tenants of today is that I want to talk about why that's important. And really my mantra is, we want to work smarter, not harder. Here is our exact opportunity to do that.

So, follow along with us today. Really think about what we're saying, what we've noticed and what we've worked on in the last 15 years. Use us as a test case because I want to talk to you about those organizations who see and have seen major shifts when they create a talent management strategy in addition to the external strategies they are creating.

Patty Hampton: Great, thanks so much Tracye. I really appreciate that. You all are in for a treat. I love working with Tracye at Nonprofit HR, she's one of our experts and she has a lot to share today.

In this diagram, you'll notice that, in the middle of the diagram, this is all about the talent management lifecycle. For those individuals working in your organization right now, how are you managing the lifecycle for the time that they're going to be with you?

This diagram shows your organization can't just survive, but has an imperative to thrive. That is what I'd like to share. And unlocking the potential of your people is part of that imperative.

So here's an example of how this works.

I had an opening at Nonprofit HR, and I've written several job descriptions over the years not even recognizing that this lifecycle does matter when you write a job description, when you first sitting down to create your job description for an opportunity that you have open. I had a vision in mind, but I had to really think harder about, how does this lifecycle work with respect to the talent that I'm going to be attracting to the organization? And what prospective candidates would be interested in helping me build out a program? What's going to attract them to the organization, to Nonprofit HR in particular?

And also, everything in this part of the pie around attracting, I don't know if you all can see my pointer, is very critical, just as much as every other part of the pie, but the most important. But then, once you get them into your organization, how are you going to grow them, and what values are you offering to them as well? So, everything on here is critical, but I really had to keep in mind that middle part because for me that's what makes an organization tick. That's the organizational culture and engagement, how are you engaging your employees once you attract them to your organization? And of course, our values. What are our values? And those regarding diversity, equity and inclusion?

We'll talk more about the equity piece. I believe Tracye has some areas around that that she's going to include regarding the thread of equity, I love to call it the thread of equity. And so, we'll talk more about that in a minute.

Tracye Weeks: And if I can just add, Patty, look at this flowchart and think about your organizations. What's different about mission-driven organizations, social enterprise organizations, is that we're hiring people who really believe in the mission and want to serve the mission. And also, it takes it a step further, because usually, people who apply and want to be in our organizations have lived experiences with what our organizations do. It differentiates when you're identifying the right type of talent.

Think about in for-profit organizations, or just in regular businesses, we hire people and then we say we can indoctrinate them until our culture, we'll teach them our culture. But as social enterprise organizations, we hire people who have the same values as us and they help us shape the culture. So, think about it that way.

And when we move on to growth and value, the way in which you grow those people and you make them successful, and what they see as value, is intrinsically different than if you were creating that value for someone who didn't have the same goal.

Patty Hampton: That's right. Thanks so much for that, Tracye. And to be honest, as I was writing the job description, everything that Tracye just mentioned, I had to keep all of that in mind.

But we're also looking for entrepreneurial individuals. Social enterprises need people that are entrepreneurial, and how is that going to show up during the interview? And what was critical for this program is that the person could demonstrate our core values. Tracye just mentioned that, as well.

The values that they show up with are the ones that are going to be part of your culture. And how do those coexist in the same culture?

In our culture, we focus on being agile, innovative, authentic, accountable, but also, an inclusive organization. We also understand what it means to be extraordinary. That's one of my favorite words, and people tend to not understand how to interview people that are extraordinary. But once you begin recruiting for a position, the core values, just as Tracye mentioned, is all part of your mission and your vision. It's also where you can ask those behavioral-based questions as well. Anyone on this call can certainly Google behavioral-based questions that you can ask during an interview, but make sure you tie it to your values. Ask behavioral-based questions based on your values.

So, what's the strategy for how you anticipate supporting the person, as Tracye mentioned, to grow? In this part of the pie, it talks about growing. How do you ensure that the employees' time and talent is valued based on the mission and vision of the organization, just like Tracye mentioned?

If our people are “the most appreciated asset,” then we have a responsibility, especially as leaders of our organizations, to be what I like to call the chief people officer for the organization. Tracye is going to go through the tenants of leadership, as we mentioned earlier, so that you understand what your role is as a leader in the organization as well.

That means we have to hold ourselves accountable, right, Tracye? We, as leaders, are accountable for everything and every part of this pie.

Anything to add there, Tracye? We're going to move on and give folks seven proven strategies that they can deploy to unlock the potential of their staff. Tracye and I will talk about that in a minute.

But, first, as I already mentioned, ask probing questions about projects that you already know you're going to have to hire people for and that they're going to undertake. So this is during the recruitment phase, and also ask probing questions once they onboard with you as well.

Demonstrate a genuine interest in their goals and professional development, and share opportunities of where they're going to grow with the organization. People really want to know, how will I grow if I join this social enterprise? Sometimes I call it the WIIFM effect, What's In It For Me? Yes, they love the mission, they love your vision, but they also want to know how they are going to grow with the organization.

And then the other one that I know Tracye agrees with me on is coach or be coached. So as a hiring manager, if you're a hiring manager on this call, or a leader in the organization, coaching and mentoring your staff and the people that you're attracting to the organization is part of your responsibility. Remember, you own being the chief people officer.

The fourth one is around communicating your organization's values and where you are in your DEI journey. In this day and age, people want to know, are you just making a statement based on the type of organization that you are? Or are you really engaged in the DEI journey of what your organization is about? Consider expectations as well. What are the expectations around being an engaged employee? People want to know what your expectations are because they're certainly going to ask you the same sort of questions.

Then, number five is being an empathetic leader. We talked a lot about that in our own staff meeting yesterday and it was fantastic to talk about being an empathetic leader and what that meant, particularly this year because of the three crises that have come to our doorstep, as well as what it means to be not just a boss. No one just wants a boss, someone to tell you what to do and how to do it. They want to work with someone that they know actively listens. Actively listen to people that you're interviewing, that you're going to be engaging with your organization.

The sixth one is around building trust, and don't micromanage. That's one of my favorites, Tracye, don't micromanage. In social enterprises, it's about doing; it's about being and doing. Give people the freedom to take a chance. In our organization, we look to take a risk and ask for forgiveness later, literally. We say that in many of our client organizations. People do take a risk. We all know this saying about how people leave poor managers, not the organization, per se.

Then, the seventh one that I wanted to share was around the pie that we just left, that diagram, and it's embrace their well-being, their self-care. Know what motivates them, understand how they like to be recognized and share how they will be treated. People want to know, do you care about my well-being in your organization? What are the values that equate to that as well? And, how will I be treated with dignity and respect?

All right, now Tracye and I are going to just sort of run through some of the boxes here. Tracye, you mentioned earlier about focusing on lived experiences, that is very true for the social enterprise community. Let's talk a little bit about focusing on lived experiences and what that means.

Tracye Weeks: Yeah, it boils down simply to, what's your connection to our mission? What's your connection to our purpose?

Now, in consulting, the way we ask this question is different depending on what we're seeking. We would want to make sure, of course, the question is legal and it's within the rights of what we need to get. But instead of asking people for arbitrary examples, we really want to know what their experience is with the topic.

So, if I'm applying for a social justice organization, I want to know how you're connected to that topic. Why do you have a passion for that? Those are typically words you don't hear an interviewer asking, it's typically what we make up or what we say if we're interviewing somewhere. But here, in enterprise organizations, we really want to know, how are you attached to it? Because remember, most people in our organizations are not here because of head, they're here because of heart. And so, in order for us to find those people that are aligned with what we do and what we want to accomplish, we need to know how they're connected to it.

Patty Hampton: Great. Thank you so much, Tracye. We really will cover all of what you see here on this particular slide. The equity and belonging, Tracye is going to touch on that as she talks about the tenants of leadership, as well. We're going to cover alignment with respect to purpose, mission and vision, we'll touch on that really quickly, and then thrive and build a visionary legacy through replication

I can tell you right now, that in this social enterprise community, we do so much for our staff and the people that we attract to our organization, but what if the vision that they have can double its efforts across the world, and you can replicate what you're currently doing in other countries?

That, to me, is what a social enterprise can certainly do and it can certainly thrive in that space because once you have a tangible product or service that you're offering, that can be replicated. And that's what's important when people look at changing the world. I'm all about changing the world and focusing on social enterprises, and I think that's important.

So, let's move on. Tracye, anything you wanted to add there?

Tracye Weeks: I just wanted to add two points that I think are important and that will help lead us through the rest of the conversation. The one about focusing on collaboration is really also tied to our mantra of working smarter and not harder.

When we reach the Aha Effect, and we'll talk about that as the very last thing, our organization should be cohesive and it should be collaborative. And so, we should be working together and not working against each other. That also pulls into diversity, equity and inclusion and what we add is belonging because there is a difference between inclusion and belonging. And so, you should be thriving to create an organization that feels like it belongs, that it is a vital part, that is collaborative and that is cohesive.

Patty Hampton: Great. Thanks so much, Tracye.

So Tracye mentioned earlier about alignment with purpose, mission and vision. This is also critical, particularly for social enterprises.

People want to change the world. They do have a change-the-world approach. I've been in this space for more than 20 years, and although it sounds very cliché to change the world, it actually does matter when you're talking about your business, your business objectives and the approach that people come with respect to life itself. People might be really serious-minded, but are they jazzed about your mission? You're going to ask probing questions when you interview people, so going back to the talent management lifecycle diagram that we talked about earlier, you do know if people are really jazzed about your mission because you're going to probe and ask questions around that.

Then, go beyond just their competencies and skills. Nowadays, we can no longer afford to just stick to the job description. I may have wrote a job description, but I had to really massage it to the point where I said, "Yes, this is what you're going to follow."

And so, what happens is you're going to probe questions and ask questions around other competencies that they bring, the soft skills, the hard skills, yes, but what other competencies do they bring to the table that can help your organization thrive and how they're going to work on projects as well?

So dig into what motivates them. You have to know what motivates them. One of the best questions that we always ask for some of our clients when we're interviewing for them, and even for our own organization, why did you choose to apply for this opportunity? What is it about this organization that will make you say yes? So, you have to understand what that is about.

How does the personal mission, how does someone's personal mission, align with our organization as well? I want to know. This is personal. This is not just about hiring someone, this is about their personal mission. I always say that our purpose in this world was already inscribed on our hearts before we even got started. And so, that should matter to you, the personal mission and the alignment of what people care about, what's personal to them and how that all aligns.

All right, Tracye, I think you're up next. Let's go through the tenants of leadership. And this is where you all have to really listen in because, again, you are responsible for every part of that pie and you are the chief people management officer.

Tracye Weeks: One caveat to what you just spoke about, Patty, is that we aren't looking necessarily for sameness. We're looking for thought partners. We're looking for motivation. So we want to hire people who have different ideas to get to the same point. Think of it as a debate team. One side of the debate team is for and one side of it is against, we're arguing the same point though. And so, you're looking for variety in people, you're not looking for sameness, because, and it's one of the things we'll talk about, how we move an organization forward is through creativity and innovation. And we can't have that in a vacuum so, just think about it that way.

So, one of the things I am so passionate about is leadership, the way we lead and the way we show up. There are expectations of us as leaders that we have to meet in order for our organizations to thrive. Now, one of my passions is helping leaders become transformational leaders, it's kind of cliché, we're transforming into transformational leaders.

Most of us are used to a transactional leadership style. That is the style that sound like "I'm the boss, you're going to do what I say," or "You have to be here nine to five," or "Here's a task you need to get accomplished, here's when I want it back, keep me informed along the way and just let me know when it's done." That's a transactional leadership style, most of us are probably used to that, especially if you're not in social enterprise organizations.

But what we strive for in this environment is transformational leadership, which focuses on creating value along the way as we go through positive change. The end goal is of developing followers into leaders themselves. It's a cycle. You want to build your next generation of leaders, and that's how you're going to replicate your results. It's cyclical. It increases the health and credibility of the organization through empowering your people who then empower their people and so on and so forth.

On the next three slides, we talk about the trend the tenants of leadership, or the tenants of transformational leadership, which are broken down into the four I's. But I refer to them as the EIs because they're all about emotional intelligence.

The four I's identify the distinct behaviors of leaders who are transformational and not transactional. The first is idealized influence. Here, you are a positive mentor and coach. Notice that we're not saying you're a supervisor or manager; you're walking side by side with your people, mentoring, coaching, teaching and training them. This is going to create trust, respect, collegiality, courtesy and culture. And you're going to demonstrate your personally held values. This is the opposite of, "Do as I say, not as I do," where you want them to do the opposite. Whatever you're mentoring and teaching, you have to live, because your people are watching and you're training how they're going to react and how they're going to train their people.

The next is inspirational motivation.

So, we want to hold high expectations. We are going to communicate what those expectations are. But the way we get to those expectations is we're going to infuse innovativeness, creativity, thought partnership and building a collaborative strategy. We want to use inspiration. We want to use energy. We want to go beyond minimal standards because we just don't want to meet our expectations, we want to exceed them.

Challenge your people to set meaningful goals that advance not only their professional growth but their personal growth. The two are just as important in these types of organizations. And you want people to know that you consider them important. One of the reasons I love Nonprofit HR is that work balance is just as important in life balance. And we create culture so that you can step away and things are OK.

The next one is intellectual stimulation.

This goes along with growth, and I understand in our types of organizations, usually, they're very flat, there's not a lot of places we can go up. That's OK because we want to grow wide.

And when you hire people who are controlled by motivations and values and cultures, what they're really wanting is to learn more, not necessarily to learn up. So, we give people opportunity to learn, not based on what we think motivates them, but based on what they tell us is motivating for them.

I ask, "What is it you're interested in?" And then I look for opportunities for that person to gain that experience. And then I push them to be involved, to volunteer, to do and then I follow up. "What did you do? How did you volunteer? Here are some opportunities, here are some resources to do that."

And the last one, if not least, is individualized consideration.

Treat each person as unique and valued because they are, and we value the differences. Think about the debate team. Actively listen. Put your cellphone down, put your second screen up, but your computer down, look me in my face, talk to me and repeat back what I just said to you. And also, you're going to be your authentic self. That's a little different. When we walk into those big, huge organizations that can feel very impersonal, I was taught, I know, in the early part of my career, you leave it at the door. But in these types of organizations, we understand that that makes a whole person.

And so, if I'm in a meeting and I see someone is just different, they're not themselves, I'm not going to continue the meeting until I check in on them, and that's OK because remember, we're building people-centered, people-focused organizations.

Transformative leaders provide encouragement. We set clear goals. We provide recognition and support, moral fairness, integrity, promote positive emotions in others and inspire people to achieve their goals, not just the goals of the organization. These actions ultimately lead to employees contributing in new ways, and they create alternative solutions to solve problems with little intervention needed from the leader. That's the caveat. Once you've built a transformative environment, you are going to work smart and not hard.

This is when you can take a vacation, and no one calls you but to say, "Got it under control, hope you're enjoying that mimosa," or whatever it is. That's where you want to get to in an organization where there's a level of trust and communication, that you have trained your leaders, they share the vision and they're carrying on that vision.

Back to you, Patty.

Patty Hampton: Thank you, Tracye. Wow, that's incredible. Believe it or not, this is the first time I've heard about transformational leadership the way you explained it. So, people have called me a transformational leader, but now it all makes sense.

It's all tied in together as to why I sort of gravitate, if you will, being a servant, having a servant leadership style, as well as being a transformational leader too. I'm so passionate about really helping leaders to be transformational. People want to work for people that they're inspired by, that they're moved by, how they coach and mentor. So, everything that you just said, Tracye, was just spot on, I really appreciate you sharing that.

Alicia, we can go to the next slide, but I'm going to pause here just to see if there are any questions that people might have at this time that Tracye and I can answer.

Alicia Schoshinski: Yes. We do have a question here that relates to a little bit of what Tracye was just talking about. Somebody asked, how do you help people develop inside a very horizontal organization, AKA not very hierarchical, where it can be tough to determine who is responsible for anyone's growth and development?

Tracye Weeks: That goes right back exactly to what I was just talking about, about growing wide.

So, we may not know who's responsible for what, but we do know who does what. And so, our job is making that connection. When you're in a collaborative environment, you are breaking down the hierarchical barriers, those are things like an Open Door Policy, where if there's a question, you can go directly to the CEO and there not being a stipulation about doing so. Or something like, "Hey, I know Sally is working on this project. I really think she could use some help and support. Can you just sit in and take notes because it's a learning opportunity for where you want to be." You have to create those opportunities within flat organizations so that people can grow wide, not necessarily up and that's OK because they're there for the same mission. And so, if your goal is to make them a whole person that is a copy of you and your values and your culture, then they should be involved in all of those things and shadowing all of those things that you are doing because there's a lot to learn.

Patty Hampton: Great, thank you. Alicia, we can take more questions as well.

Alicia Schoshinski: OK, there is another question that is from somebody who is with a community mental health organization and is thinking about organizations like theirs. They asked: How do we support the goals without the funds? We want to invest in our people but have very little actual money.

Patty Hampton: Yeah, Tracye and I both have comments about that, for sure.

There are intangible ways and tangible ways to certainly invest in your talent, invest in your staff. One of the biggest ways I would certainly have folks do is look at your benefits. If you offer benefits to your team, look at the benefits that you offer.

There are some, what I like to call, hidden gems around how you can support individuals. There are EAPs, of course, online, within your insurance, like your short-term and long-term disability, or life insurance policies. Sometimes, you'll see EAPs being offered inside of those. Inside of those EAPs, there's a whole host of things that people can focus on with respect to wellness as well. So even in there, there's also wellness programs that are free that you can certainly highlight in your handbook, or when you communicate with people around what you offer and what is valued by your organization.

The other one is around growing. If we go back, again, to that diagram that we first talked about, LinkedIn Learning has some freebies. Take advantage of the freebies. I do as a leader in my organization myself. As a leader, I have to keep growing too. How can I coach and mentor other people if I'm not continuing to grow myself? So take advantage of LinkedIn Learning. There are several free programs and learning opportunities on LinkedIn Learning as well.

Tracye, anything to add?

Tracye Weeks: Exhaust the free resources because they are out there and they were harder to find before COVID. Now, there are so many, there are free aspects and utilize your status as a social enterprise organization because there are more freebies. But in addition to that, don't underestimate the value of your time. And all that goes into coaching, leading, mentoring.

For example, we're virtual, not unlike most of you or everybody else at this point in time, and even though we may be busy, what I do with my team is there's a dedicated 30 minutes to an hour every week just for them to show up. And when they show up, I ban them from talking about anything that's work related. That's free, it costs me nothing, but time. And remember, put the iPad down, put the computer down, we're going to listen and be present in the moment, and it builds and creates value and culture.

Patty Hampton: Exactly.

Alicia, we're going to move on, I'm sure there are more questions. According to my time, we probably will have additional time left towards the end, but I want to get through this slide because based on everything that Tracye and I just mentioned, this one is the most important.

It's about building an intentional culture—and I'm going to emphasize the word intentional because my business partner, Lisa Brown Alexander, and I have intentionally built for the last 20 years an intentional and collaborative culture. We interview for that as well.

It begins with your organizational leadership. Model the behavior that you want to be seen in your culture. If you are working on the weekend, which I am sometimes guilty of, then you may have direct reports that will work on the weekend as well. I'm very guilty of that. But I'm also mindful that that happens as well.

Then, people in teams, they have to trust one another. You have to somehow build into your all staff meetings some sort of activity that requires people to trust one another. Trust the ideas that your colleagues bring to the table that's going to help the organization move forward. Remember, we said you're not just surviving but you're thriving. The only way to do that is by having a collaborative culture, a culture that trusts each other in how you're bringing innovative ideas and being entrepreneurial within the organization.

Then, values and behaviors that drive results. Remember, we talked about interviewing people about their mission, their vision for their life. It's all about their lived experiences. They're bringing their own set of values from birth. To what was instilled in them from the moment they were grade school kids all the way up through where they are now in their life journey, interview for that. It will become part of your culture when you interview about what matters to them because how they work and how those values tie together is exactly how they will treat the people you serve and how you can, not just survive, but thrive and have a thriving culture.

And then, people are focused on mission and outcomes. That's a given for the social sector, in particular, the social enterprise community. People want to be focused on the mission. What is the mission? How does it impact me? How can I help change the world? What are going to be the outcomes of the projects that you're engaging me in?

Then, imagine an open, I say imagine because Tracye and I have probably a short story to share, but imagine an open feedback culture. Yes, and/or let's explore a new path. The reason I pause there and tell you to imagine is because at Nonprofit HR, we always use ourselves as an example and we give each other sort of a high five, if you will, when we have clients that want to create a similar type of a culture of open feedback. That means that if I notice something during a meeting that Tracye did, Tracye doesn't report to me. It doesn't matter. But I have an opportunity to go to Tracye and talk to her about something that I may have noticed during a meeting or something that I wanted to learn because I noticed that she did it really well in a meeting, and I need to learn how to do that really well.

Tracye, anything you want to add there?

Tracye Weeks: Or to check on me, if I seem different or to offer me support if you notice that something is off, and that's what's important. Has anyone seen the movie "Yes Day"?

That's your challenge for tonight. Go watch "Yes Day" because it's all about saying yes and seeing what it develops from there. Thinking in the positive and through the positive, that the glass is always half full, not half empty. That will typically switch your training of how you approach problems and solutions and outcomes.

Patty Hampton: Right, very good, Tracye. Thanks for that. The other thing I wanted to point out as we look at number five is around performance. If you go back and you think about the pie, people want performance feedback. They want to know how they're performing. Unfortunately, at Nonprofit HR, and I say unfortunately because there are people on the call that have a formal performance feedback system or tool that they're using. Well, at Nonprofit HR, remember I said that we build an intentional culture, so we do open feedback. Yes, people have a conversation on an ongoing basis. And we have a conversation around the annual timeframe that people have come into the organization, but there are no surprises. There are never any surprises.

People know when they're not doing well because the entire time, whether it's weekly or daily, on an ongoing basis, they are constantly talking with one another and being open about what they're sharing. And, like we said before, either coach or be coached. Then, we also have a saying about celebrating people to success someplace else. The culture that we have, the culture that you will intentionally build, is not going to be for everyone. You will notice it immediately once the person is on board, and I guarantee you for the first 90 days. So whatever that timeframe is for you, it could be 90 days, it could be 30 days, 90 days or six months. At some point, you will know that this is not the right culture for the person that I hired. Guess what? It's OK. It's OK that you made a mistake. Hiring is not supposed to be perfect. There is no such thing as a perfect hire. Really, there isn't.

Tracye Weeks: And don't make people feel bad about that. I always remind people, yes, 90 days is our opportunity to evaluate if this works for you, but you should also be evaluating if we work for you. And don't be afraid of checking in on that because a lot of times, they're just differences, and it's just different before someone realizes, "Ah, this is for me," or it isn't, and you should expect that and foster them because you're fostering them toward working toward their purpose, regardless of what that is or where that is.

Patty Hampton: That's right. And then the sixth one that we can touch on just a little bit is around building an inclusive remote culture, versus on-site teams, nowadays. So, half the world is remote right now. Some have gone back to work to their office space, some have not. But we have to be intentional about how we are including people who are remote, that in itself can be very challenging. But thank goodness for Zoom. Thank goodness for, I believe Google Meet is still available. Thank goodness for so many technological tools that we have before us, where people who are remote or work in a different country, different city and state, can be included.

Make sure that they are included, and not that they're just on the technological tool that they're using, but you're calling on them. Say their name. We just learned that yesterday, make people feel included. Say their name, and you'd be surprised how they will shift when people just hear them.

And then, people demand inclusiveness nowadays. All of that matters in this day and age, especially with our organizations, and we're trying to diversify and thrive.

You have to have and hire people that have diversity of thought. That is a thing. That's the lived experiences that we talked about, their lived experience is different from yours. We talked a little bit about that earlier, and hiring people with diversity of thought is really key as well.

Anything to add there, Tracie?

Tracie Weeks: What we're seeing now as a trend in hiring and a trend in talent management is that, yes, people are evaluating if this is somewhere they want to work, if this is someone they want to give up their time or give up their service to. And people are judging you before they even get to you, you're kind of the last factor. And then, the expectation is that you will build and support that when they are in the organization. And if people do not feel that, see that and can research that from the beginning, they're turning down jobs because it does not fit into what their mission is, what they believe in and what motivates them. It's different than it used to be.

Patty Hampton: You're right. You're right. Tracie, thank you so much.

Next, create a sense of belonging. We mentioned belonging earlier and ensuring that everyone's voice is heard and they can contribute, again, just calling on them during a meeting. Talk to people or call out someone's name who you've never heard from before in an all staff meeting or just a project that you're working on. Make sure that you're calling on those individuals, so that they know that they need to be engaged, and they should engage, and you are counting on their diversity of thought as well.

Then, encourage and embrace informal networks. We have a lot of those here at Nonprofit HR. Many of our clients do as well. People use Slack. There is a variety of tools and work products that you can certainly use, you can collaborate on case studies across the organization for example. This happens in many project-based organizations as well, especially in the social enterprise space, there's an opportunity to collaborate with people in the ecosystem itself.

Would you mind helping me on a project that I'm working on, and let's do a case study together. Guess what? It is beneficial for your organization and the other organization if you have a collaborative case study that you're working on.

And it benefits not only your organizations, but also the ecosystem at large.

Tracye Weeks: I love the tenant of embracing informality.

We want people to be innovative and brainstorm and be creative. In my earlier career, I managed a call center. As you can imagine, call centers are very busy. Your job is to be on the phone. All of my fellow managers were upset because I took my team off of the calls once a week for 30 minutes, and we went outside and we became one with nature, or whatever you want to call it in that moment. Take a breath, let's refocus on our goals, let's have a laugh, but not one time did we ever get in trouble for not being on the phones because we were rated number one on the floor for our tenure.

So, focus on informality. It feeds you on the backend. Remember, work smart, not hard.

Patty Hampton: That's right. Thanks, Tracye, and then everyone owns their fair share of the workload with an end goal in mind. What is the end goal that you have in mind? What's going to be the outcome?

Believe it or not. Even at my age, in my role in the organization, I've done my fair share of some administrative work. It's not about Patty doing the administrative work, and I'm sure Tracye has been the same way. But it's more about getting the work done, getting the end goal in mind. For us, it's about clients, it's about serving the clients, about delivering results, and whoever is in my space, whoever is working on a project with me, they are my collaborative partner. We have a collaborative culture, and so I'm not above doing any administrative work. I've done that, my entire life, even in my own personal business. You have to do some sort of administrative work. If you have the team that does that, god bless you.

But sometimes, you do have to have a roll-up-your-sleeves attitude, and I read a book, I think it was called "Get Sh*t Done." Just get stuff done, and that's what it's about.

Tracye Weeks: Remember, collaboration in our type of organizations is less about hierarchy and it's more about how we accomplish the mission.

Then, it also ties into the tenant of growth. And, how are you going to be able to step away if everyone is not cross-trained and understands the importance and value that every person on the team brings? You can roll all that into the way you build culture.

Patty Hampton: That's right, that's right. And so, the last one is really on brainstorming. Give people the space and an opportunity to brainstorm, again, with the technological tools that we have like Microsoft Teams and Slack and all the others.

You can brainstorm together. That's where ideas are birthed. And so, I think that's also a critical piece of building a collaborative culture and how important it is as well. Alicia, we're going to take some questions right now.

Alicia Schoshinski: OK, Patty.

One question that came through was asking about some of the core qualities. Can you name some of the core qualities of a great people manager who can unlock the potential of social enterprise talent?

Patty Hampton: So, I'm thinking that the person who asked the question may have missed the very first half of the session, which is OK. Some of those core qualities are being a coach and being a mentor. You're not just the boss. We get that, we understand it. The other one is around demonstrating a genuine interest in the individual's goals and their professional development. They're invested in their own professional development, but guess what? You have to be as well. You have to be invested in their professional development. Then, I think we said earlier, coach or be coached. As a leader, you have to serve as a coach and a mentor. Especially nowadays, you are the chief people officer for the organization through attracting, growing, the values and everything in the middle, which deals with the culture of the organization as well. Then, the other one is around being an empathetic leader. We talked earlier about being an empathetic leader. Then, building trust, of course, is one of the biggest ones as well. Tracye, I think you may have one or two more.

Tracye Weeks: I did. There are some very specific ones when we talked about transformational leadership. So, providing encouragement, setting clear goals, providing recognition and support, moral fairness, integrity, provoking positive emotions in others and inspiring people towards their goals, not just the goals of the organization.

Patty Hampton: I apologize. My dog is barking and is not happy right now. He's a German Shepherd in a whole other world right now.

Tracye Weeks: Are there any other questions that we can answer that came through, Alicia?

Alicia Schoshinski: Yeah, you talked about the manager's role as a coach and being responsible for the employee development, what role do you see that's placed on the actual employee in that development path?

Tracye Weeks: It's a great question because it's shared responsibility. It's actually a perfect segue when we move into the Aha Effect of how this all works.

Every one of us is responsible for our own development, but accountability to that development is really where it all comes together. And so, what I see are leaders working harder because they think, "If we're leading, we have to create. We have to come up. We have to resolve. We have to provide solutions." All you need to do is ask. Ask someone what it is they need. Ask them what it is they like, ask them what it is that motivates them and then ask them how they would resolve that. "What's your solution to that?" And, let's talk through whether that's a great idea or not. You don't have to work as hard as you probably are already working because you give people the opportunity to create their own paths and all you have to do is agree or fix.

Patty Hampton: Great. Thanks, Tracye. Alicia, anything else we can answer?

Alicia Schoshinski: I think we can wait until the very end if you wanted to move on to your next slides, and then we can come back to some more questions.

Patty Hampton: OK, great. So, our last slide was more around the Aha Effect. It's about retention and satisfaction. How satisfied are people who are engaged with your organization? And again, trust.

It's the moment that you realize when everyone in your social enterprise organization is contributing their gift of greatness. If you remember anything from today, it's about individual contributors to the larger goal. Your vision, mission and purpose are being fulfilled because others believe in what they cannot see. As a leader, everything all of a sudden is working in tandem with each other. The people that you hire, that wheel that we just showed you, the Aha Effect, everything working together because everyone's moving toward the same goal, toward the same end goal.

People will move forward with a vision that they can't even see, even if you don't paint the perfect picture. People will continue to move forward because they believe, if it's a social justice organization, they believe in the mission of being a social justice organization and the mission and the work that goes into that and what that looks like.

We have B corps that believe in the products that they sell and that they're helping to be an employment organization, so that they're employing people. The mission that you have is tied to how people are going to continue to move forward.

Tracye, anything to add?

Tracye Weeks: It's less about seeing, also, in the Aha Effect; it's more about feeling, which in a lot of organizations, they don't feel. But in our organizations, we feel. It bonds people together, it ties us together and it helps us move forward together.

And lastly, one of the things I always say is that it's not by accident, it's by design. And really, the success in creating the culture is making it a point to build a strategy about creating this type of culture.

Patty Hampton: That's right.

Tracye Weeks: Three years or five years, whatever your plan, it's about creating culture that's all centered around your people.

Patty Hampton: That's right, That's right. Thank you for that, Tracye.

Alicia, this is our last slide, so either we're ending early or there are more questions we can certainly answer.

Alicia Schoshinski: We can definitely take time for questions, and thank you again, Patty and Tracye, for all the information you shared this afternoon.

Certainly, it has been a great and timely discussion, but please add more questions. You can just type them in the questions box, and Patty and Tracye will get to any of the questions you have in any of the time that we have remaining.

So, I saw one question that was related to what you were actually just speaking about, the focus on mission and people being attracted to that. How do you connect everyone to the mission in all positions, such as ones that are not as direct-service oriented, such as finance and others?

Tracye Weeks: Oh, there's a way. We build these, and I know in the consulting role, I build these types of, what do we call them, work plans.

From this point of view, and being in HR also, I always say, I spend the money, I don't make it. I'm operational a lot of time, so I have to work harder to prove my value. So, one of my tenets is, my job is the people, inside the organization, internally. You should be able to come to me and have the things that you need taken care of for you, your person, your families, your peace of mind, in order for you to serve the vision and serve the mission of the organization. That's my role.

And how do you do that? How do you set those goals? How you set those goals for your strategic vision will automatically align to what the mission and the vision and the values of the organization are.

Patty Hampton: That's right, and if I could add to that one, Alicia.

I heard the piece about a finance position, it's a perfect example. People and finance are the two biggest assets that any organization needs to continue to move forward.

If you don't hire a financial steward to move and keep and maintain your financials, and understand the programs related to those finances, then you have the wrong person in the role. They have to understand how programs work and the people that are needed, that's the HR component that comes in. Even if it's just one project that you're working on, and how all of that ties to the mission and the vision of every outcome, from every project or service that you're providing. It all ties together.

There is a reason we have a finance person, even if it's outsourced. There is a reason why you have people that manage and run programs. There is a reason why you were awarded that grant for that project. And so, all of that has to work in tandem.

Tracye Weeks: I'd say that's the reason why we don't work in silos.

We work collaboratively so that everyone is aware of how their parts touch one another, and how their parts are just as important as one another within the organization.

Patty Hampton: That's right.

Alicia Schoshinski: Great. Thank you. The next question is, considering COVID, how can organizations plan for the short term and also create a progressive, long-term and sustainable approach to workforce planning and skills development?

Patty Hampton: Mhmm, Tracye, that's all you.

Tracye Weeks: The short answer is, give yourself grace and get through now.

And so, one of the first things we did at the beginning of COVID was dropped our five-year plan because all our focus needs to be on the next nine months and giving people the grace and space to be in the moment. It's OK to say, "Hey, we have to cut back on some things." One of the questions I asked my clients at that point in time was, "What do you need to do to keep the doors open?" Everything else is unimportant at this point.

Then, when you're ready to rebuild, you rebuild together. It's not just on you, remember. Things have changed. Now, you need new opinions. Now, you need new brainstorming on what has happened. How does this change our business, and how can we be innovative and take advantage of these changes? Glass half-full all the time, not glass half empty.

Patty Hampton: That's right.

Alicia Schoshinski: Great. And then another one just came in. First off, they had a comment that said, "This is such an affirming presentation. So many leaders get so stuck on keeping their eye on the goal and how to manipulate the staff to get there." They asked, what are some successful ways to engage the diverse leadership and work qualities within an organization in this inclusive environment?

Tracye Weeks: Repeat that, Alicia.

Alicia Schoshinski: I'll repeat the question part, sorry.

What are some successful ways to engage the diverse leadership and work qualities within an organization in this inclusive environment?

Tracye Weeks: Ways to engage inclusivity in the environment?

Alicia Schoshinski: That might be what they're asking for, or they may also be talking about leadership styles being very diverse, I'm not sure.

Tracye Weeks: OK, if that's what you meant, you can definitely reach out to us. But from my understanding, there are diverse leadership styles and people may not see, people may not take the same road. We might think differently about how we get to where we're going.

And, if you have built, or intentionally build, a collaborative environment, those things are excluded because we don't really care how you get there. What we care about is the end goal and the end result. But, if you don't have an organization where you can say, this is repetitive, this is not innovative or this is not helpful, you don't have a collaborative environment, and you've got to start there. Are people being accountable and owning that? Those things we need to work on, and it starts with leadership. Because, if you're leading by example, if you are showing people how you want them to be, but you're closed-minded and not open, then you are building the opposite of what we talked about in the last hour and a half.

So, we have to take accountability for what we know, what we don't know, what we are, what we aren't, where we want to be and what we're OK with.

Alicia Schoshinski: Thanks, Tracye. And another question: How do you hold staff accountable when they're not meeting expectations?

Patty Hampton: That's my favorite. Shall I answer that one, bluntly, Tracye?

Tracye Weeks: Go right ahead, yes.

Patty Hampton: Open feedback is what we talked about.

A person should know when they're not meeting expectations. If you're meeting with your team or person or people on an ongoing basis, no matter what routine you've established either weekly or monthly or quarterly, there's never a surprise that they're not meeting expectations.

We term, in our organization, giving feedback and helping them get to where they need to be if you have to, which I hate altogether, as a PIP, or a Performance Improvement Plan. But they should never be surprised that they're not meeting expectations and here's why they're not meeting those expectations.

So, you have to either do a PIP if you have an organization where you're doing performance reviews and you have in your handbook a process that you have to follow as well. That's number one.

Number two is, if you do have an open feedback culture, then I would want to have a conversation with that individual. Give them on a scale of one through five the areas where they're not meeting expectations, so that there isn't a surprise. Give them time to improve.

Put a timeline on it for them to improve, or, at some point, recognize if it's just not going to work. I don't like to use the word fit anymore or it's just not a good match. I try to steer clear of some of those words because of DEI, number one, and being an inclusive organization, but celebrate these folks to someplace else. And it could be that they need to run their own business. There are a lot of people that I know to this day, they were not set out to be managed. Period. They are now running successful organizations on their own.

Tracye Weeks: I always say, fail fast.

You want to be able to fail fast when it's not a fit and it doesn't work. You want to be OK with that. Remember, we talked about us saying, "Does this work for us?" and people identify if it works for them as well.

And if it doesn't, help them and support them. I love what you say, Patty, celebrate them out. And that's a good thing, it doesn't have to be a punitive process. What your responsibilities, though, are to be open, to make sure that you are upfront and honest and that you are transparent because that's how you are held accountable or how you're holding yourself accountable.

In one of my previous jobs, I literally was in charge of everyone who exited the organization, voluntary or involuntary. I will tell you, at the height, it was approximately 350 people a year. Every single person who left that organization I had a conversation with, and not one person left an organization saying, "I hate the organization and I hate you." And that says a lot about how you help people manage out and celebrate them out. I love that, Patty.

Patty Hampton: Alicia, do we have time for one more?

Alicia Schoshinski: Sure, one more question. It gets back, I think, to that passion related to people who are wanting to work for social enterprises, but what are some key questions in identifying high intrinsically-motivated individuals?

Patty Hampton: Key questions during the interview stage or phase?

Alicia Schoshinski: It sounds like it could be either in the interview phase or as you have people and you're trying to develop them, too.

Patty Hampton: OK.

Tracye Weeks: There's one question I'll add before Patty talks about other questions that she's probably experienced and asked.

When we talk about people having lived experiences and having motivations, a lot of times we ask people, "What happened?" But we should take it one step forward and ask, "How has that affected you? How does that still show up in your work, in your life today?" Because it's going to give you a true example of how they still live with and what affects them, their motivation, the way they move, the things they think, the way they go about accomplishing things and handling tasks. They're going to take those experiences they've dealt with, but how do they use them in their everyday life?

Patty Hampton: That's right. And if I can add to that, Alicia, I think, again, we mentioned behavioral-based questions during the attraction phase of the talent management lifecycle.

I cannot stress any more that it is critical that you're not just asking passive questions when it comes to interviewing people anymore. They are behavioral-based questions that you need to probe and ask about, ask people for examples. "Can you give me an example of a time when you were entrepreneurial?" Let them talk through the lived experience that they're going to share with you. So, that's one.

And then, the other that I really love is, “Why this organization, why my social enterprise, and why now, at this point in your career?” That’s another great question. It will demonstrate their interest in the organization. Did they do their homework about the organization? What’s motivating them just on the vision and mission that you have? And why do they want to be a part of changing the world and want to be a part of that mission? I think it’s a tell-all, when you ask people, “Why this organization and why now?” They will share what their personal values are. You can ask people about what they value in an organization. “Talk to me a little bit more about what you value in an organization, as a leader. What expectations do you expect from a leader?”

The more they talk, the better. To me, they will tell their story, and every time they talk, something shows up. Your job is to be the chief people officer and uncover the talent that is required for your organization to help you move forward, not just survive, but to thrive. How is that person going to add diversity of thought? You’re dealing with all of this during an interview phase as well.

Tracye Weeks: And something you just said, Patty, was great. I think we need to lead with that question: “Tell me your story.”

Not, “Tell me about your resume.” Not, “Tell me about your work history.”

“Tell me your story.”

Patty Hampton: That’s right.

Alicia Schoshinski: OK, great. Somebody asked, how can we deal with cultural breakdowns at the middle management level and ensure that managers own their role in intentionally building and sustaining culture? So, basically, not just leaving it to top leadership.

Tracye Weeks: Are you on board or are you not?

What I’ve seen is we tend to have two to three or two different sets of rules for different people in our organizations. And usually, as we move up the accountability lessens. Well, remember, we’re building a collaborative organization, so there’s not necessarily a middle manager. There’s a mentor, there’s a coach, and are they leading by example and being held accountable to that?

So, remember, also, it’s by design, and so the messaging is about collaboration, the messaging is not about managing. We don’t use the term supervisor, we use the term mentor, coach, thought partner. That’s intentional because we have to get everyone thinking across the board about what our responsibilities are, and our responsibilities are to each other, internally.

Alicia Schoshinski: Great. Well, thank you both. Thanks for letting us toss in one extra question there at the end. We appreciate it. That is all the time we have for the question and answer section today, but we definitely thank everyone who attended today's webinar. We certainly hope you found the information to be valuable, and thank you again to Patty and Tracye for leading today's very dynamic discussion.

We've shared the link to a new blog by today's presenters, so be sure to check that out. And if your organization is a social enterprise, be sure to visit gosita.com where you will see more information about how we are partnering with social enterprises. We have many, many more webinars coming your way in 2021, so be sure to check out the events calendar at nonprofithr.com/events.

Also, please be sure to complete the feedback survey that will pop up once the webinar has ended. Your comments will help us with our planning and can inform topics we can cover in the future as well.

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Thank you so much, and have a wonderful day, everyone.