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Critical Team-Building Tools in Philanthropy

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TOOLS

Key Points

- Using the experience of a team at a large, U.S.-based foundation over a four-year period, this article examines four essential tools for cultivating high-performing teams in the philanthropic sector.
- The tools are giving and receiving feedback, the art of appreciations, organizing meetings to produce accountability, and assessing team communication styles, all applied with a racial equity lens. Use of these tools resulted in a more cohesive team that performed well when buffeted by changing priorities and substantial global problems.
- The tools are likely applicable in every sector. But when used by foundations where large-scale social issues are the crux of the work, the resulting high-performing teams are most likely better equipped to confront concerns vital to philanthropy.

Introduction

Philanthropy, like many other sectors, organizes its workers into teams. In a highly networked and interdependent world, individual actors will not find solutions to intergenerational and intractable problems. Any lone grantmaker likely lacks the full knowledge to correctly identify the root cause of a problem, much less to figure out how to assemble the best solutions for tackling the challenge.

A team, according to Jon R. Katzenbach and Douglas K. Smith (1993), is "a small number of people with complementary skills who are committed to a common purpose, set of performance goals, and approach for which they hold themselves mutually accountable" (p. 112). Teams are a fundamental way people organize to successfully tackle work. We think better together than we do apart.

Building effective teams in the philanthropic sector should be an easy task. Where else are there so many extraordinarily passionate, well-educated people, motivated and willing to apply their expertise to making the world a better place?

Unfortunately, the structure of the sector creates a significant barrier to highly effective teams. With only the organization's vision and mission as a guide and without a measurable bottom line – like the profit measure in the corporate sector – teams within foundations struggle to row in the same direction (Drucker, 1990). The predisposition to organize into silos impedes collaboration and knowledge sharing among colleagues. Team members often become confused about the foundation's role in the change process, mistaking grantmaking for an end goal rather than an input to achieving enduring social change.

Using the experience of one team in a large U.S.-based foundation over a four-year period, this article examines four essential tools for cultivating high-performing teams in the philanthropic sector. The tools discussed are giving and receiving feedback, the art of appreciations, organizing meetings to produce accountability, and assessing team communication styles, all applied with a racial equity lens.

By no means was this an exhaustive list of effective team-building practices. However, when applied with focus, rigor, and sufficient investment of time for teams to learn and practice new habits together, these tools resulted in a more cohesive team that performed well when buffeted by changing priorities and substantial global problems. The enumerated tools are likely applicable in every sector. But when assembled and practiced in foundations, where large-scale social issues like poverty alleviation are the crux of the work, the resulting high-performing teams are most likely better equipped to confront concerns vital to the philanthropic sector.

Building an Effective Team

In 2008, the W.K. Kellogg Foundation began concentrating up to two-thirds of its grantmaking resources in several priority places, including Michigan, Mississippi, New Mexico, and New Orleans. Internationally, it worked in micro-regions in Haiti and Mexico. By focusing a majority of annual grantmaking to a limited number of geographic locations, in full partnership with communities and over an extended period, the foundation hoped to create lasting change for children and their families in those places.

In 2010, the Kellogg Foundation created a new place-team structure by assembling a diverse group of staff from existing teams in the foundation to form three new teams, focused on improving conditions for vulnerable children. Separate teams were composed for Michigan, New Mexico, and a team for Mississippi, and New Orleans combined, joining an established Latin America team. Teams already existed for the foundation's national work in education, health, and family economic security, along with racial-equity and community-engagement teams. The focus of all the foundation's teams was the audacious vision of improving outcomes on behalf of vulnerable children.

The Michigan team was comprised of 14 racially diverse individuals with impressive academic credentials, deep content knowledge, and organizational skills. However, this group of foundation staff had not worked together before. The new team needed to learn how to work across a variety of differences – including but not limited to age, race, gender, and organizational role – in support of the foundation's deep commitment to racial equity. There were four geographic teams within the Michigan team (Battle Creek, Grand Rapids, Detroit, and statewide), which added to the complexity of functioning as one place team.

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To help with team building, the Michigan team engaged InPartnership Consulting, an organizational development and strategic change firm with a strong practice of supporting philanthropic teams.

The process began with an assessment of how the team organized relationships, communicated within and across the foundation, and delivered on results. The first year's data painted a picture of a good team with a passion for making a difference on a range of issues. The initial report findings were summed up by one team member: "We're clear on the what; being clear on the HOW we're going to get to success is what we need now. We're tackling society's biggest issues in the hardest recession we've ever had, in the hardest-hit state!"

The assessment also revealed a tendency within the team to avoid conflict, due in part, to a "culture of niceness" (a self-description that the team considered to be a cultural norm in the Midwestern region where team members worked). Respondents also highlighted another trend: "[We don't] handle mistakes well"; "[we are] critical of errors." Interview feedback suggested that these tendencies had a corrosive effect on the team, reinforcing silos and undermining team success.

The team identified three key challenges:

1. too many meetings,

One key skill was developing a practice of giving and receiving feedback, which proved to be the most critical competency. The organization benefited when teammates were able to exchange honest and timely information about issues that prevent work from moving forward.

2. too much time spent responding to urgent issues or crises, and

3. not enough time available to plan and build trusting relationships across the team.

In light of these findings, the team's leadership made – and stuck to – a decision that proved to be a core breakthrough for the team: In part to nurture and strengthen relationships, they decided to dedicate two full days every month for the team to strategize, plan, and learn new skills together.

The team members' reactions to this innovation ranged from skepticism to relief. InPartnership, meanwhile, saw an opportunity to support a good team's transformation into an aligned, collaborative, and trusting team focused on results. Between 2010 and 2014, the team added new members and lost others, bringing it to 21 members. For four years, 2010 to 2014, InPartnership administered an annual assessment to each team member to track the team's progress. Using the assessment data, the team was able to track its progress in applying several critical tools and make corrections as needed year to year.

Giving and Receiving Feedback

One key skill was developing a practice of giving and receiving feedback, which proved to be the most critical competency. The organization benefited when teammates were able to exchange honest and timely information about issues that prevent work from moving forward.

If the feedback process was so valuable, why was it so hard to do well – or at all? A simple answer: The human brain appears hard-wired for protection from pain or discomfort. Criticism may be perceived as a threat, which triggers the primal "fight or flight" instinct – part of the "minimize danger, maximize reward" mechanism that neuroscientist Evian Gordon calls "the fundamental organizing principle of the brain" (as quoted in Rock, 2009, para. 5). When faced with feedback, a stress reaction complete with the release of the steroid hormone cortisol is not uncommon. As a result, hearing and sharing honest feedback among team members had somehow morphed into an expectation of the "gotcha" game. Given the brain's response to a perceived critic, practicing receiving feedback was as valuable as knowing how to give it. Engaging people in this highly sensitive area became a valuable tool for team development. The feedback tool was practiced in nine of 20 meetings from January 2011 to June 2014.

A first principle for giving feedback was that the person must be sure that the information will help the recipient be more successful. When feedback was framed as a tool for improving another's performance, the interaction was robbed of its ability to sting. Feedback needed to be planned in advance of its delivery. Nothing good for a team happened in the heat of the moment. Practicing developing a written plan for giving feedback proved crucial to the team's progress, because such introspection allowed the giver the opportunity to think deeply about the feedback's content and purpose.

Another critical element was asking permission to give feedback. "Is it a good time for me to give you some feedback?" may sound at first like an odd question. However, the act of asking permission allowed recipients to prepare for new information and, if needed, to arrange for an alternate time when they were more likely to be able to hear the information.

A simple "thank you" was important to remember when receiving feedback. This courtesy acknowledged that one teammate cared enough about another's success to give a gift of feedback. Asking questions – for clarity or to improve understanding – was the next step. Receivers needed to make sure they deeply understood the feedback. Sometimes, those two steps were all that were needed for success.

When they first started practicing giving each other feedback, the groans were audible and the anxiety on colleagues' faces was plain. Filling out short forms to structure the feedback helped to relieve some of the pressure. InPartnership designed a structured feedback process where peers provided feedback to one another about their strengths and contributions to the work. (See Figure 1.) The intent was to provide positive, constructive information that allowed team members to improve their work and relationships.

Consistent feedback helped team members build trust. Regarding the practice, a teammate commented: "I thought I was going to die, but it wasn't bad. It was helpful."

In an assessment of growth in communication skills from 2011 to 2014, the team rated skills in giving and receiving feedback as having improved on a five-point scale, from lowest ratings of 3.1 and 3.8, respectively, to 3.5 and 4.1 in 2014. (See Figure 2.)

Appreciations

Practicing the powerful art of appreciation provides a balance to delivering feedback that may sometimes be perceived as negative. As noted by researchers Jack Zenger and Joseph Folkman (2013) in the *Harvard Business Review:* "Only positive feedback can motivate people to continue doing what they're doing well, and do it with more vigor, determination, and creativity" (para. 8).

In most meetings, applause becomes an automatic and perfunctory response signifying thanks. By contrast, when verbal appreciation was expressed for team members' contributions, it compelled givers to engage thoughtfully with what they had heard or experienced. Effective appreciations were specific and directed at a single person.

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The team practiced appreciations at every team meeting from January 2010 until June 2014, the period under review, and at every team meeting since. Members have begun to bring the practice to other foundation teams. Team members now regularly make time to appreciate each other. The first time they receive a verbal appreciation in front of a group individuals tend to be startled, but they quickly learn to enjoy and benefit from the praise.

Decision Action Log

Disorganized meetings that produce little action are the root cause of underperformance for many teams. According to the Mayo Clinic (2012), disorganized people are more likely to feel anxiety and stress, which can result in diminished mental and physical health. As a result, disorganized meetings may take a toll on the health of a team. Business consultant Audrey Thomas (2014) cited

FIGURE 1 Sample Form to Structure Giving and Receiving of Feedback

Michigan Team Feedback 2.0

POP Your Conversation!

1. What's my purpose in giving/receiving this feedback?
2. Is it the right purpose from my point of view?
3. Is it the right purpose from the other person's point of view?
4. Is my primary goal coaching, evaluation, or appreciation?

Ask

1. What's one thing you see me doing (or failing to do) that holds me back?

During the Conversation

1. Spot the topic(s).
2. Stay on track.
   - Ask: Are we are the same track? (If you are aware of more than one topic, name the two topics and give each one a track.)
   - Ask: What is the real topic here?

When You're the Recipient of Feedback

1. In what ways is this feedback right?
2. How do I get in my own way?
3. Where have I heard this before?

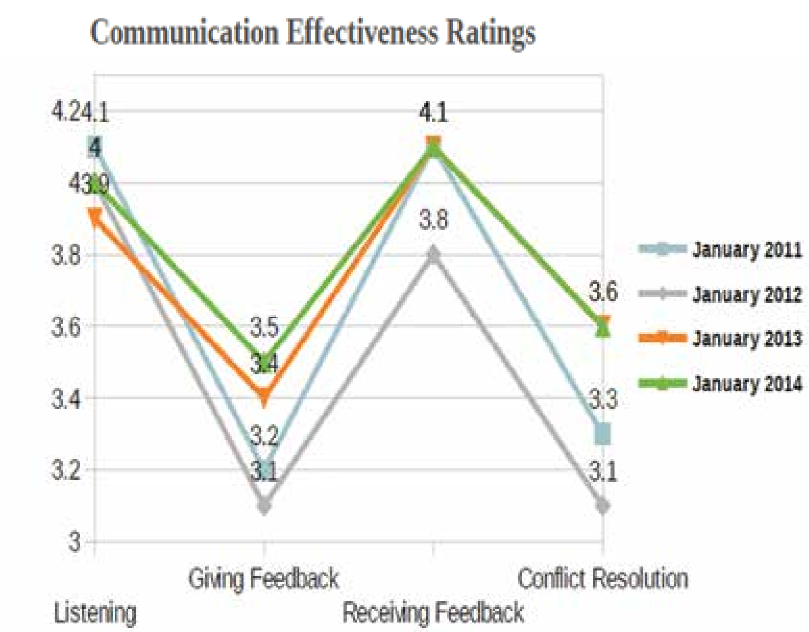
Move to Action

1. Determine one small step (action) you could try to see if the advice is useful.
2. Agree on a time by when you will take the step.
3. Identify a time to check in and determine if the feedback and actions taken have improved conditions for both of you, or if more conversation is needed.

(Stone & Heen, 2014)

InPartnership

FIGURE 2 Communication Effectiveness on a Five-Point Scale, 2011-2014



"inability to make decisions" (para. 8) among the root causes of disorganization reported by her clients.

One tool to combat disorganization was the Decision Action Log (DAL): a simple chart of what action must be taken, who will take it, and by when it must be completed. When used consistently and correctly, the DAL was a powerful tool of accountability and facilitated team agreements around moving work forward.

In this practice, a team member was assigned to note decisions made by the team during a meeting on a large flip chart that everyone could read; this created a clear record. At the end of the meeting, detailed review of the DAL ensured that the entire team understood all items discussed and agreed upon. Checking the previous DAL at the beginning of the next meeting reinforced a culture of accountability, and helped create more useful and efficient meeting agendas.

The DAL was introduced at the inception of the new team and was practiced at all 20 team meetings from 2011 until 2014. Using this tool well proved harder than the team imagined, however. In reviewing the previous DAL at the next meeting, the team asked questions like, "Does anyone remember what that task was?" During the review of items, another challenge was to not use meeting time to start working on an item – an easy habit to fall into – but instead to check for completion and to assign a new deadline if the task had not been completed. Use of the DAL has now spread across many Kellogg Foundation teams, improving colleagues' accountability to one another and making meetings more productive and valuable.

Mapping Interpersonal Style

No one would start a journey to an unknown destination without a map. Why, then, would an organization undertake to build a team without first developing an understanding of its members?

Individuals bring their preconceptions of others into any team environment. As Brenda J. Allen (2004) discusses in *Difference Matters: Communicating Social Identity,* "when we interact with people, we often draw on what we expect and assume about the groups they represent to form our attitudes and to direct our behaviors" (p. 2). Finding a common language to describe and complement differences was an important part of building a high-performing team. There are hundreds of ways to assess individual styles, including the venerated Myers-Briggs Type Indicator. Using the Interpersonal Leadership Styles (ILS) survey, the team mapped every individual's preferred communication and thinking style.

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The ILS assessment identified people as one of four types – Directors, Analyzers, Counselors, or Persuaders – as well as the level of intensity of each type (e.g., extreme Persuader; on the line between Analyzer and Counselor). While the ILS did not capture the important and complex identities that shape how we see and interact with the world, it did provide insight into how

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Various configurations of styles brought different strengths and challenges to the team. Awareness of similarities and differences in styles contributed to the team's performance.

individuals use their power to get things done, how they like to work, how they tend to focus their actions, and the amount of order they like to have in their life.

Using the ILS provided the team members with a nonjudgmental language for talking about differences and similarities. As new members joined the team over the years, the ILS was administered and the team discussed the meanings of different roles. Analyzers dominated the team at its inception; four years later, the team has a larger number of Directors. Persuaders have historically been fewer in number, and the number of Counselors has shrunk to just one on the current team. There was no magic mixture of styles; the understanding each member's style helped build stronger working relationships.

Various configurations of styles brought different strengths and challenges to the team. Awareness of similarities and differences in styles contributed to the team's performance. Project planning now included an intentional effort to bring a mix of ILS styles to the design of plans and programs. The goal is to maintain a balance of perspectives and approaches to improve program results.

Building Racial-Equity Skills

To fulfill their organization's vision, the Michigan team required not only a set of tools to support its development, but also a way to operationalize the foundation's deep dedication to racial equity. In 2010, the team completed Bennett intercultural sensitivity self-assessments. In 2011, the foundation as a whole took the Intercultural Development Inventory (IDI), a 50-item assessment of intercultural competence and the capacity for shifting perspective and appropriately adapting behavior to cultural differences and commonalities. The foundation received an organizational score, each team was given its score, and each individual had a personal score.

With the introduction of this tool to the foundation, the Michigan team had additional language to discuss its score and the members' individual journeys. Improving the team and individuals' scores became part of every team member's annual goals. The team goal for 2011-2012 was simple: "Understand and improve our team IDI profile." A reassessment in 2013 showed improvement in both the foundation as a whole and the Michigan team. The IDI measured progress across a continuum from denial to adaptation; the Michigan team had moved from the middle space, minimization, to the next stage of acceptance.

The team's conversations about both assessments led them into discussions of race, power, and culture. The team realized it needed to develop a shared language, approach, and perspective for talking about race and thinking about racial equity – and to build capacity for addressing cultural dynamics as a vital component of cultivating a strong and trusting team.

Over the next few years, during each monthly meeting the team invested time in thinking about and working to build understanding of how the dynamics of race impacted their work – with each other, and with community members on foundation-funded projects and initiatives. After the first year of focused racial-equity work during the team meetings, one staff member commented: "We've had really good discussions. ... We're starting to feel comfortable sharing and asking questions. ... Everyone's heart is in it." But other staff members acknowledged, "We still have a long way to go."

As a result of this engagement, the team now owns the responsibility to bring a racial-equity and healing lens to every aspect of its work. In the 2013 assessment, one team member described this new level of rigor: "To enter into difficult conversations is new for us. ... [We've created] a safe space for … people [to] speak up honestly. … [T]hat is a very new behavior. It has been easy and comfortable."

Acknowledging this plateau allowed the team to identify that a deeper dive would be needed to ultimately improve the lives of children in Michigan: "We need to go deeper into racial equity and get everyone to contribute to the conversation, so that we can help grantees understand why they need to integrate racial equity" into their approach.

Conclusion

By understanding individuals' communication and thinking styles, team members maintained a sense of who they were as a group, even as the team doubled in size and some members departed while others joined. Through an annual assessment, team progress was measured by employing the four tools described in this article: giving and receiving feedback, appreciations, using the Decision Action Log, and assessing team communication styles. Evidence of progress can be seen in the change in average team effectiveness scores, which rose between June 2011 and January 2014 from 3.5 to 3.9. The tracking of assessment scores also unearthed the ups and downs of team building. In June 2012, when the size of the team doubled, collaboration and effectiveness ratings dipped. In January 2014, an increase in team size was accompanied by a dip or flat-lining in scores.

Lower scores could be attributed to the learning curve that accompanies the onboarding of a significant number of staff members – each of whom must adapt and buy in to the prevailing team framework, and develop skill in the use of team-building tools. Interview comments also pointed, however, to a need for deeper understanding of the impact of constant internal fluctuation and frequent staff transitions on the team, as well as improved mechanisms through which team members adapt to change. Having the annual assessment and frequent refreshers on the tools made it possible for the team to then make progress on critical indicators.

These tools, practiced with consistency and rigor, provided the team with the foundation for capacities and ways of working that allowed them to produce results in service to vulnerable children while successfully managing change, maintaining trust, and building collaborative relationships.

From observation, the shifts in capacity can be summed up as:

- from "what can I contribute?" to "what can we accomplish together?"
- from a "stay out of my business" approach to thinking about how to contribute to each team member's success, with feedback that leads to action, appreciating each individual's contributions, and supporting everyone's success.
- from leading with control and certainty to practicing how to model vulnerability, candor, and humility in the work.
- from "I'll do it myself" to making the conscious choice to ask for help and to solicit other team members' input in order to make the best possible decisions.
- from silence on issues and dynamics impacted by race, gender, age, power, and other dimensions of difference to talking regularly about how identity, race, and privilege shape perspectives and daily experiences – allowing team members to more fully bring themselves into the team and be affirmed, and leading to greater awareness and opportunity to build respectful relationships across differences.

The larger question of whether improved team cohesion will eventually lead to improved outcomes for vulnerable children in the three cities of focus continues to be much more difficult to measure. In the corporate sector, it seems widely accepted that teams drive organizational success – the more organized and cohesive the team, the better the bottom line (Ancona & Bresman, 2007). Our assumption in undertaking these

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The belief was that aligned grantmaking had the potential to foster regional coalitions and networks, and build a larger base of support for policies benefiting children and families. Measurable progress toward this goal began to emerge around 2012: Significant work was now underway across the three places, for which the Michigan team credited the fact that they had built mechanisms for collaborating.

team-building practices was that the same was true in the philanthropic sector.

In the four-year window covered in this article, with child poverty in Michigan hovering at 25 percent, certainly no large-scale improvement in child-level outcomes was realized and none was expected. From the time the team was assembled, however, one of its stated goals was to align grantmaking across the three places and connect it to state policy levers. The belief was that aligned grantmaking had the potential to foster regional coalitions and networks, and build a larger base of support for policies benefiting children and families. Measurable progress toward this goal began to emerge around 2012: Significant work was now underway across the three places, for which the Michigan team credited the fact that they had built mechanisms for collaborating. "We've co-created strong, measurable, achievable goals for this year," one team member commented. Another observed, "Team members show up in alignment wherever we are."

The team continued to work toward the highest level of performance with disciplined use of these tools and assessments. Monthly meetings, for which the team once needed two full days for in-depth team-building strategy and practice, evolved into more effective half-day sessions.

The team has met its grantmaking deadlines, moving a significant percentage of the foundation's annual budget. One of the only federal requirements for foundations is that they distribute 5 percent of their investment assets for charitable purposes (Renz, 2012). One measure of team success could be narrowly construed as the Michigan's team contribution to the foundation meeting this requirement. For three of the four years under review, the Michigan team was able to move more funds than it had been assigned in its annual budget, between 22 percent and 24 percent of the foundation's annual payout.

Given its commitments in its priority places for the next 25 years, the Kellogg Foundation continues to refine its measurement and evaluation efforts, including examining the connection between team cohesiveness and overall outcomes, to answer that larger question of how its grantmaking contributes to improved outcomes for children and their families.

As Jim Collins (2001) concluded in *Good to Great,* "Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice and discipline" (p. 310).

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