

Operate Intentionally to Grow Sustainably

Building a solid foundation for organizational growth

Structural Integrity

Agenda

Objectives today: Help organizations prepare their operations to support sustainable organizational and personnel growth by sharing:

1. Key **philosophies** to guide sustainable growth
2. Key **operations systems** to have in place, with deeper dive into ones that are often overlooked or undervalued
3. **Resources** for organizations to build these key systems

About Us

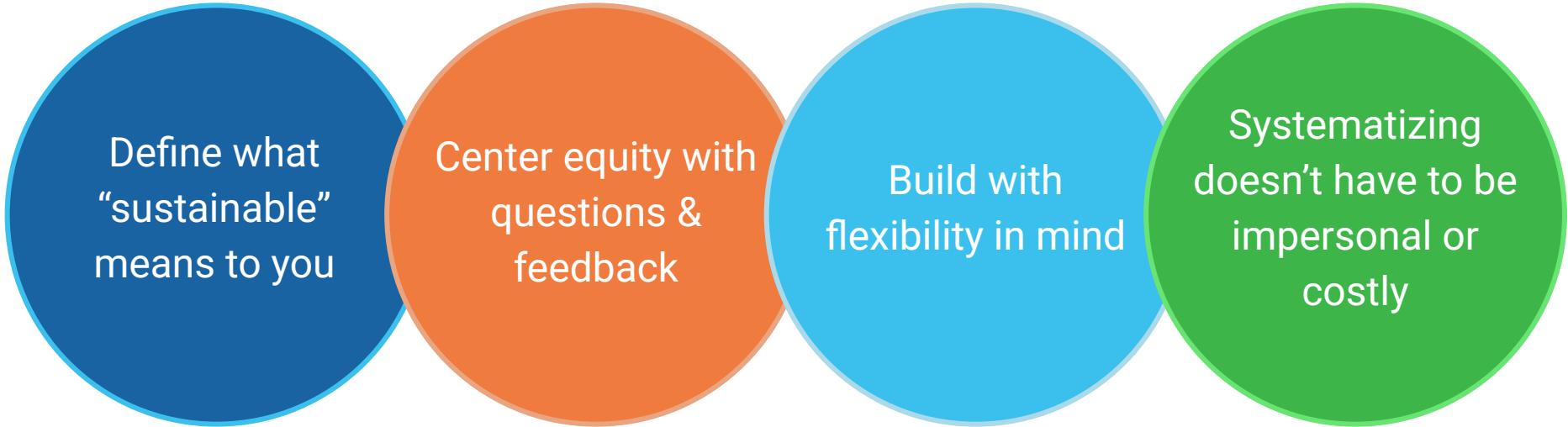
Structural Integrity is a nonprofit focused on strengthening the nonprofit sector by helping mission driven organizations build their foundational operations to **generate capacity, enhance sustainability, and center impact.**

We bring a combined 30+ years of experience working in nonprofit finance and operations.

Understanding who's here

- a. What is your organizational headcount currently?
- b. Since two years ago, our headcount has...
- c. How would you describe where your organization is in its growth trajectory?
- d. For those who have experienced growth, how has it felt to you?

Key philosophies to guide sustainable growth



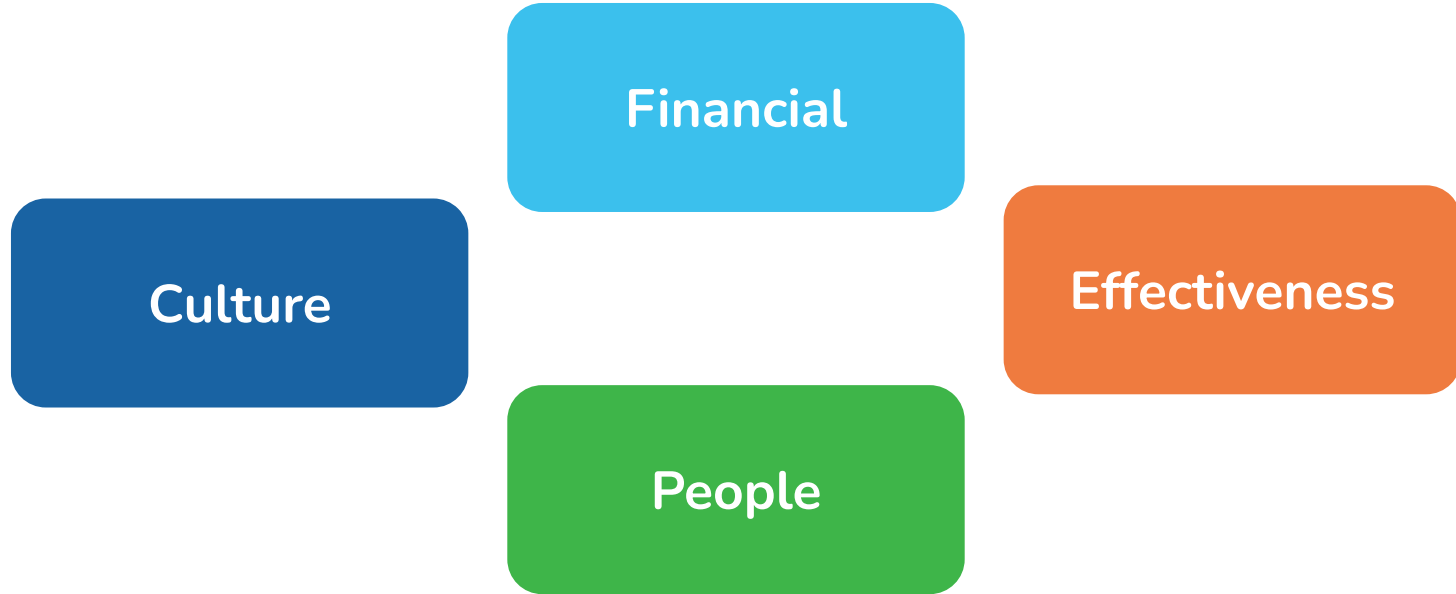
Define what
“sustainable”
means to you

Center equity with
questions &
feedback

Build with
flexibility in mind

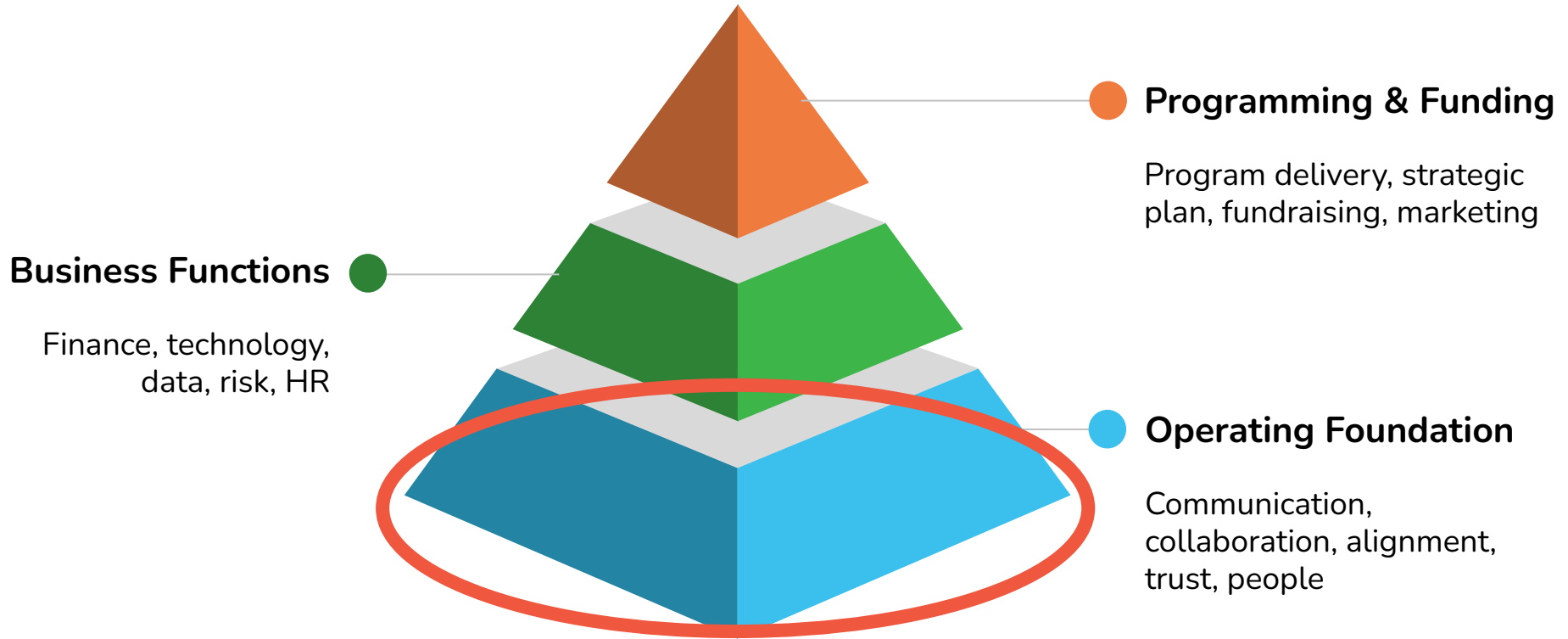
Systematizing
doesn't have to be
impersonal or
costly

Defining Sustainability

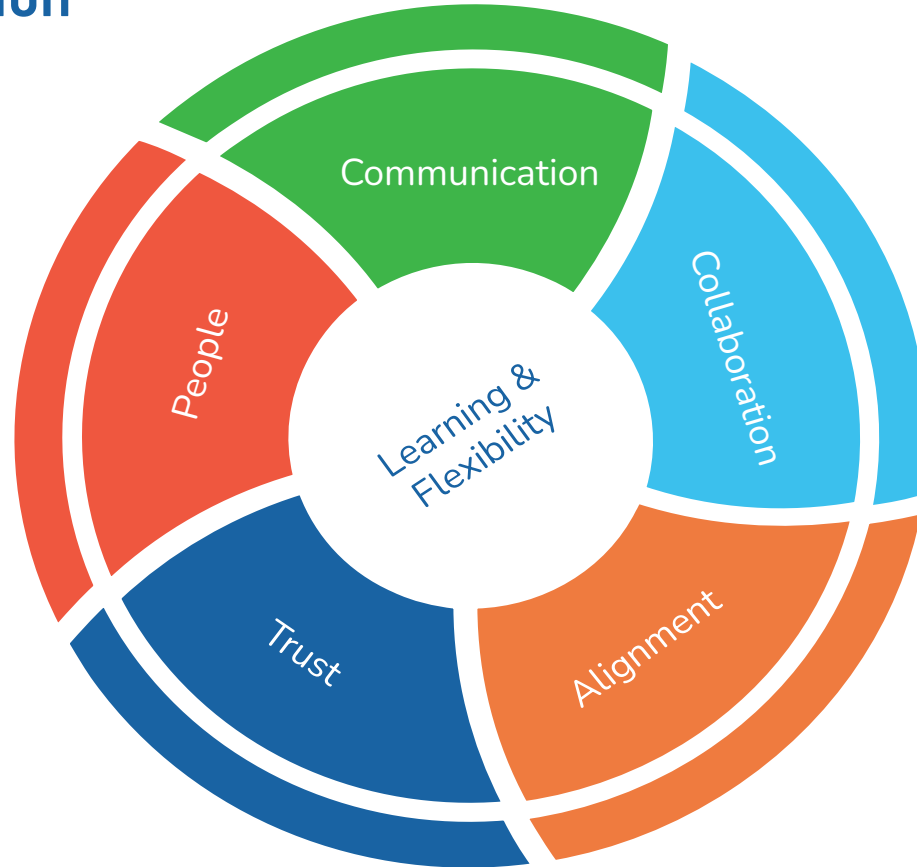


Key Systems

When we say “operational systems,” what examples come to mind for you?



Operating Foundation



Communication

Establish regular ways for staff to *provide and receive*...

- **Feedback**
 - Pulse checks, surveys on major decisions, annual org health survey, check-ins, office hours
 - Share findings to increase transparency and trust
- **Information**
 - Newsletter, intranet, staff meetings, standing meetings
 - Create ways for all staff to contribute, not just leaders
 - Set norms for what gets shared that err toward more not less

Collaboration

Set expectations for working together through...

- **Effective meetings**
 - Sharing an agenda in advance, making the meeting purpose clear including why specific attendees are invited, setting a short default length, starting and ending on time
 - Invest in facilitation skills
- **Project management**
 - Template (e.g. google doc), tool (e.g. asana), defining roles and decision making through framework like MOCHA, RAPID, or DARCI
 - Be clear on what success looks like and have a single owner
- **Accessibility to one another**
 - Norms for responsiveness, communication of preferred ways of contacting one another, calendar visibility, use of workblocks
 - Leave space for staff to do focused work

Alignment

Ensure staff are working in the same direction through...

- **“Annual planning” that clearly articulates the year’s goals and how staff contribute to them**
 - Setting cascading org/team/individual goals as part of annual planning process
 - Give staff a voice in the resources they need to achieve their goals
 - Regularly revisit plans to assess and adjust (build the expectation of flexibility)
- **Clear process for committing to new work & funding**
 - Standing meeting to review new funding opportunities that includes staff across depts
 - Be consistent and seek input from those impacted by the decisions, *before* decisions are made

Trust

Prioritize staff connections by creating opportunities for...

- **Interpersonal connection**
 - Strategy for in-person time (like staff and department retreats), keep space in check-ins and standing meetings for getting to know each other as people, informal interest groups, onboarding 1:1s
 - Consider impact of proximity to power & leadership
- **People to learn about one another's work**
 - “Eat & learns,” shadowing, “all hands” events and activities
 - Don't make it optional to learn about what other teams do

People

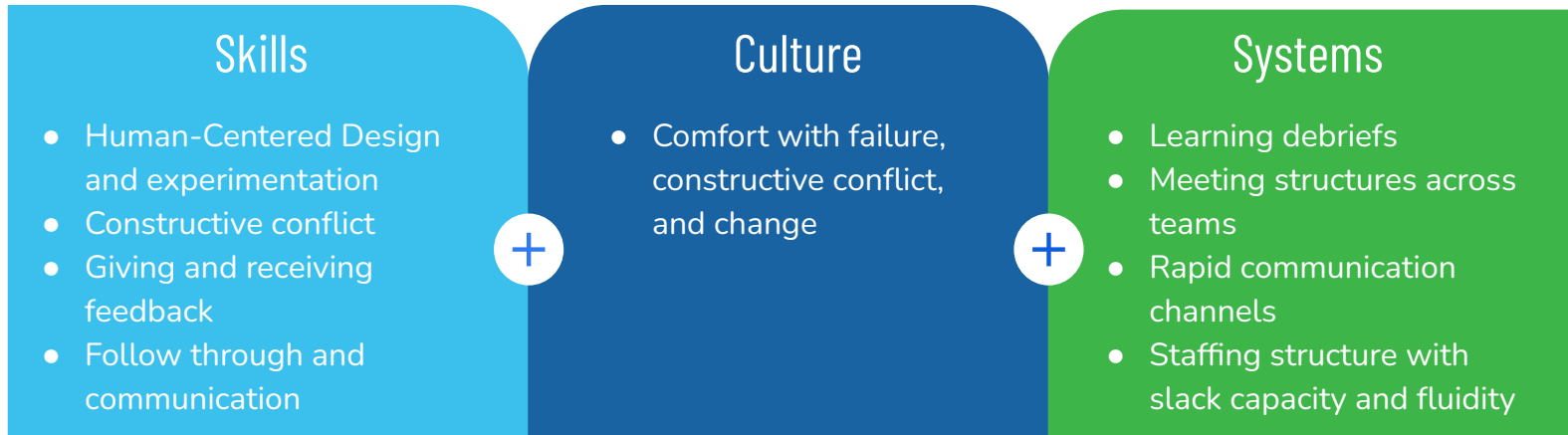
Provide consistent support for people to do their best work through...

- **Equipping managers with skills and tools**
 - Check-in template, regular training, peer support
 - Don't assume tenure = good management
- **Ensuring clear roles and feedback for staff**
 - Job description, goal-setting, 360 feedback
 - Design roles for the people you have but also the needs of the organization
 - Role clarity / enabling people to focus on core responsibilities aligned to their talents
- **Solving capacity challenges at the root**
 - Planning for the unexpected, clear roles and expectations, efficient systems and communication
 - Address root causes *before* trying to hire your way out of capacity constraints

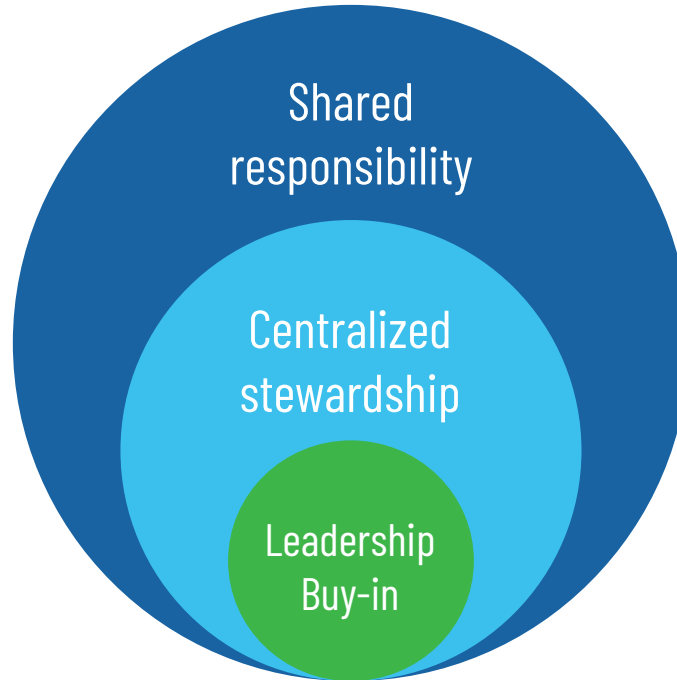
Learning & flexibility at the core

Change is inevitable; learning and flexibility are essential for an organization to survive and thrive

- Systems should be built to evolve and change as your organization does - when faced with options, consider the value of the system that offers more flexibility
- Embed learning and flexibility into your organizational skills, culture, and systems:



Who owns this work?



- Implement in daily work
- Provide feedback to continuously improve
- Create the strategy, norms, tools
- Enforce & train
- Hold themselves and others accountable
- Vocal champion

Wrap Up

Key takeaways

- “Operations” is about all the ways staff interrelate and work together, not just discrete topics like finance, facilities, technology, human resources, and legal/risk management
- Every organization operates, the difference is whether an organization is intentional about its approach to operations or not
- As an org grows and/or staff turn over, informal systems start to break down
- Without a strong operating foundation, everything else you try to do will be harder

Key takeaways

- The bigger you are, the more time it takes to put foundational systems and practices in place – better to build before you think you need it
- Even the most mission-driven staff have their limits, an inefficient operating environment does not have to be their reality
- Systems don't have to be expensive or complicated
- Technology and hiring aren't the cure-all
- Judging “success” depends on how you've defined “sustainability”

Individual reflection - Information to action

Take a few minutes to write down:

- 1) Three things that stood out to you that you want to bring back to your organization as next steps
- 2) Any additional information you think could be helpful to begin implementing changes in your org

Wrap Up & Questions

Questions & comments?

APPENDIX

Resources

- [Structural Integrity:](#)
 - Project implementation, including systems building, assessment of current practices, coaching/thought partnership, and interim support – info@structural-integrity.org
 - [Embedding equity within your operations](#)
- Manager tools, templates, and training: [Management Center](#)
- Facilitation training: [Interaction Institute for Social Change](#); [Compass Point](#)
- Nonprofit financial topics & forums: [Nonprofit Financial Commons](#)
- Cybersecurity assessment and support: [Consortium of Cyber Security Clinics](#)
- Technology assessment, resources, and equity guide: [NTEN](#)
- AI Readiness Diagnostic: [Project Evident](#)
- Discounted costs for a powerful CRM: [Salesforce “Power of Us”](#)
- Discounted technology: [Tech Soup](#)

Business Functions

Finance

Financial structure and management that enables informed decision-making as program & funding complexity grows.

- ☐ Finance & accounting system
- ☐ Expense reimbursement/ purchasing system & policies
- ☐ Financial structure & reporting
- ☐ Annual budgeting process
- ☐ Grant budgeting & understanding full cost
- ☐ Revenue forecasting
- ☐ Alignment of financial data across finance and development functions
- ☐ Policies: reserves, budget variance, dual controls

Risk

Manage risk most relevant/impactful for you, not eliminate it entirely.

- ☐ Tracker for key compliance deadlines, understand multi-state implications
- ☐ Data privacy relevant to your work
- ☐ Process and policy for contract approval and signatories
- ☐ Professional legal support

Business Functions

Technology & Data

Leverage technology while avoiding system proliferation; make it easy and intuitive for people to find the information they need across teams and avoid info siloes. Ensure proper security measures.

- ❑ Outsourced MSP for tech support & security
- ❑ Standards around who gets what equipment and why
- ❑ Technology to support – not constitute – impact strategy
- ❑ Shared data system across teams
- ❑ Clear document storage architecture and norms

Human Resources

Establish systems and practices that create consistency in staff experience regardless of tenure, seniority, proximity to power, and identity.

- ❑ Clear onboarding/offboarding that sets new hires up for success and retains knowledge from departing staff
- ❑ Consistent hiring process
- ❑ Manager training and ongoing support
- ❑ Performance management, inc 360 reviews
- ❑ Transparent & values-aligned Compensation Philosophy
- ❑ HR compliance, with awareness of multi-state complexities