



USING BASELINE DATA AS A NEW CEO: AN INTERVIEW WITH MCKNIGHT FOUNDATION PRESIDENT KATE WOLFORD

Kate Wolford joined the McKnight Foundation as president in December 2006. The Foundation had commissioned its second Grantee Perception Report® earlier that fall, and the results arrived just as Wolford came on board. A few months later, she used CEP's Staff Perception Report. In this interview with CEP Senior Research Writer Judith Ross, Wolford tells how receiving feedback from the Foundation's grantees and staff helped her hit the ground running as she embarked on her new role.

JR: Let's start with the Grantee Perception Report. What were the benefits of receiving those results as soon as you came on as president?

KW: Coming from the other side of the table as a grantee, I am very aware of the difficulty of getting honest feedback, given the inherent power differential between foundations and grantees. To receive anonymous data that is based on consistent questions that are asked of other foundations' grantees, and have the answers compared with those received by a group of foundations that are fairly similar to one's own, is an invaluable opportunity. It gives grantees the confidence, hopefully, to be quite honest. The Grantee Perception Report definitely provides insight into the perspective of those with whom you are interacting. It tells you how well grantees perceive your foundation's management of relationships, communications, and the tasks to which we commit as grantors and grantees in trying to shape a different future. That kind of objective data is very helpful.

JR: How did having the Grantee Perception Report results help you in your new role?

KW: First and foremost, it was an opportunity for us to be much more consistent and clear about our internal procedures. We had quite a few new staff because of turnover and expansion during the transition before I came on. So it was a way to get us all on the same page in terms of what we hold ourselves accountable for in managing both tasks and relationships. Since we depend

on our grantees to accomplish our mission, we need expertise in issues and understanding how to assess grants, but also skills in managing relationships with our grantees. The Grantee Perception Report gave us an opportunity to develop an organization-wide plan for addressing issues, and it gave me a chance as the new CEO to signal that I take this seriously – it's not going to be put on a shelf. For example, we now have a grantmaking standards guide specifying the timelines in which certain procedures should take place.

JR: You used the Staff Perception Report a few months after becoming president of McKnight. Why?

KW: In part, it was the experience that we had with the Grantee Perception Report, which was an incredibly helpful tool in getting a baseline perception from grantees. I felt that I would benefit from having a similar assessment where internal people could respond anonymously and give very honest feedback about their perceptions. I also wanted the comparative information to get a sense of where we were positioned in relation to our peers. And it was an opportunity for our senior leadership to set a new agenda for the internal organizational culture.

JR: What did staff think of the Staff Perception Report process?

KW: The biggest question for the staff going in was, "Is it really going to make a difference?" There was already some credibility developed because of the way we responded to the Grantee Perception Report: within six weeks we debriefed staff, created an action plan, and appointed work teams to follow up. So that garnered credibility in that were we to engage a staff survey, those results would be taken just as seriously.

JR: Can you share any details about what you learned from the Staff Perception Report?

KW: There was an incredible amount of goodwill from the staff and a strong sense of camaraderie, so there

were a lot of positives to build on. There were some areas where people said, “Here’s something that would really help us to feel more effective in our work.” For example, like many organizations, there was a sense that there were too many silos and that we needed ways for people to better appreciate functions and roles across the organization, understand how each person’s work contributed to the mission, and in that way help them feel more directly engaged no matter where they were in the organization.

Another perception was that professional development opportunities were not spread equally across the organization – that senior and program level leadership had more of those opportunities. And so, with staff input, we created a wider range of staff development opportunities. Some were specific to the job, and some were more about career development. These included everything from training in communications and giving presentations to managing work-life balance. So while some were job- or organization-specific, others were meant to help people develop into well-rounded individuals committed to the nonprofit community.

The survey also confirmed what I had already been hearing, namely that staff wanted more clarity and transparency around how decisions are made in the organization. These included decisions about how compensation is structured, expectations for the performance management system, and how organizational goals and priorities are set.

JR: Did the Grantee Perception Report and Staff Perception Report work together to give you deeper insight?

KW: Yes. The staff survey really focuses on the foundation’s internal stakeholders and internal procedures, and the grantee survey pushes you to look at your external stakeholders. But if you are not perceived as having consistency of communications on one, for example, you are going to be hamstrung on the other.

The issues that we focused on in the Grantee Perception Report were around transparency and clarity and consistency of communications of goals and strategies. A lot of what we heard in the staff survey really did dovetail with those issues. The more we can be clear and really make sure that everybody internally understands and has buy-in, the better we can meet the

challenges that we set for ourselves in responding to the Report.

JR: What are some of the specific things you are doing to improve in those areas?

KW: We constantly remind ourselves that one of our values is respect for those with whom we interact. That then becomes a work-related behavior of how we manage our communications – whether we’re delivering news that people would want to hear about a grant or what they’re hoping not to hear. We must be able to do that with as much clarity and respect as possible.

Then there have been some very pragmatic steps. For instance, we didn’t have individual email addresses on the Web site. If grantees are asking for more frequent and personal communications, putting staff’s direct emails on the Web site versus funneling them through info@mcknight is one of those practical steps that communicate transparency and accessibility.

JR: And what about improving the clarity and consistency of communications about goals and strategies?

KW: The communication staff did an internal review of all our guidelines. As a result, quite a few were updated, streamlined, and then tested with grantees to determine whether or not they were actually clearer. Also, our Web site now offers more opportunities for feedback about the clarity of different communications.

We are also taking steps to ensure that as new staff come in they are thoroughly oriented about areas where there is flexibility and areas where we expect consistency. We do a lot of internal coaching with all of our program staff to make sure that they understand not just what we do but why we do it.

JR: You put your Grantee Perception Report results on your Web site. Why?

KW: One of our values is accountability, and we want to demonstrate that sense of accountability and transparency to the general public and to our grantees. We want grantees to know that we value the time they took to give us input, and that we are willing to share it. We ask our grantees to learn and to share their successes and failures, so we want to model transparency and accountability ourselves. Also, we

work with tax-privileged dollars. We are accountable to the public for operating with sound practices and with being willing to look for areas of improvement.

JR: Would you recommend engaging assessment tools like these to someone who is starting a new leadership role?

KW: I would. Data is helpful. Comparative data is even more helpful. You always have to look at it vis-à-vis your own organizational structure, your mission, your values, but in the absence of data, it's pretty hard to make judgments. You want to be grounded rather than simply anecdotal.

JR: Do you have any advice for others who are considering using the Staff Perception Report and/or the Grantee Perception Report?

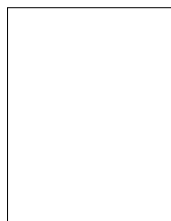
KW: If it's going to sit on a shelf, you're probably better off not doing it. Just by doing it you set an expectation that you are serious about what staff and grantees are telling you. Having a follow-up process is critical.

We used a fairly participatory process in sharing the results of these reports with our staff. We had CEP's staff in to debrief our entire staff both times to signal the importance of these reports. For the Grantee Perception Report we set aside an additional day to really dig in and allow everybody in the organization to respond and give ideas about opportunities for improvement. And then the senior leadership team forged those ideas into an action plan.

JR: Do you plan on repeating these assessments?

KW: Yes. Our board is committed to repeating the Grantee Perception Report. In terms of the Staff Perception Report, the first one was a baseline. I'll be keen to see where we are in another year or two. Otherwise, how else do you know if you've improved? By repeating the same tool, you have the benefit of comparison. If you have a theory going in that certain changes will actually lead to a different result, you can test whether or not that's been accomplished.





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