Rockland Trust's Non-Profit Collaborative Seminar: Navigating Disruption – January 27, 2026

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Alison Burns

Good morning and welcome, everyone. I hope everyone has weathered the storm safely. My name is Alison Burns, and I am a member of the community giving and engagement team at Rockland Trust. At Rockland Trust. Being a bank is about more than providing financial products and services.

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Alison Burns

It's also about being a strong advocate and steward for community organizations that help support the individuals, families, and businesses that make up our communities. This is a fundamental belief that has been a core element of our culture for 115 years. On behalf of our colleagues, it is my pleasure to welcome you to Rockland Trust's first nonprofit collaborative seminar.

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Alison Burns

The nonprofit collaborative is a proud legacy that Rockland Trust continues from enterprise Bank. And we are thrilled to carry it forward by delivering meaningful support, valuable related resources, and impactful learning opportunities to nonprofit organizations across our footprint. We are delighted to have so many of you joining us today, and we truly appreciate you taking time out of your busy schedules to be here.

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Alison Burns

Please note that a recording of today's seminar, along with a slide presentation, will be shared with attendees after the session. We will leave time at the end of today's presentation for questions, and encourage you to share them in the chat. We are excited to have Eric Curtis, CEO and Partner of Curtis Strategy, with us today to share insights and tools with us that will help us navigate disruption. Please welcome Eric Curtis.

Eric Curits

Thank you, Alison, I appreciate it. And thank you to the Rockland team for having me. I'm very grateful to be here today. And very grateful for having, a huge audience, this morning. So, really appreciate everyone taking the time, today to be with us. And I am going to talk a little bit about some of the things that we are seeing and doing, with clients throughout the presentation.

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Eric Curtis

As we all know, the level of disruption, across multiple nonprofit sectors is fairly substantial. And I think that if I was to look at kind of a core theme that I would like to get across today is, about leaders acting intentionally to move their organizations forward. And we're going to share some insights on things that we use and tools that we use.

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Eric Curtis

And methodologies that we use to be able to do that. So again, I appreciate everyone being here today. I thought I'd start out with just giving a brief background on what we're seeing, out there in the market in general. And as we all know, technology is advancing at an unbelievable rate. What that's allowing organizations to do small, medium and large is to operate at scale more effectively through the use of technology, tools and solutions.

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Eric Curtis

One of the sections that we're going to talk about today is business models and how technology is evolving business models, which is the way and manner in which organizations deliver service technology, having shrunk our world down quite a bit. What that has created, is a lot more competition. I know that's not a word that we have heard often in the nonprofit space, but there is quite a bit of competition.

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Eric Curtis

And I'll talk about how that unfolds, throughout the presentation with, competition for staffing, competition for funding, so on and so forth. And as a result of a lot of that competition and our world getting smaller, every nonprofit sector that we work in, from Health and Human Services to even higher education, are looking at means of partnership consolidation, whether that's through mergers, affiliations, shared services or other types of strategic partnerships.

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Eric Curtis

In addition, we kind of all feel the cost of everything is rising, due to inflation. And there's a lot of challenges that exist in attracting talent and retaining talent because of those associated costs going up. And organizations are feeling that struggle, even some that might have workforce crisis, issues within some of their programs. And services.

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Eric Curtis

The, the, the regulatory environment will, will, call that a hot mess right now as that is, a very dynamic, environment. But I think some of the things that we are seeing are the threats to the tax exempt status of nonprofits, whether that's in the 501 C3, 501 C, six tax designations, and those are areas that I know a lot of the trade professional associations have a lot of attention to is protecting those tax exempt status.

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Eric Curtis

And then lastly, probably one of the biggest impacts we're seeing because not only does it impact culture, but it impacts how an organization plans is the retirement of executive leaders, from the CEO to maybe those top two levels within an organization. And this is something that's happening very rapidly that organizations might not be as prepared as they should.

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Eric Curtis

And so we're actually going to give some tools and suggestions, and constructs for, for how to look at that. A little differently from an organization design perspective. As we get into this and, and these are some high level trends, and, and, and I know we're going to allow for 15 to 20 minutes if, if not more, at the end for and a so as we go through, if there's anything that you'd like me to address or answer in the presentation or things that I don't cover, just save those questions for the end and there'll be plenty of time to put them in the chat.

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Eric Curtis

And the Rockland team is going to help me, dive into that. So most, most nonprofits have to go through a strategic planning process. And, and one of the things that we'd like to do is maybe enhance the way that's looked at from a business model standpoint. And business modeling is about looking at the way and manner in which you as an organization deliver value, whether you're delivering value to students,

grantees, patients, individuals, whoever, that those stakeholders may be, the way and manner in which that service is being delivered.

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Eric Curtis

And the reason being is we've entered a time and space where technology is supporting different ways to evolve business models and the way those services can be delivered, either for creating additional capacity, or for improving the efficiency or effectiveness of the process. This this is a tool that we've used, in terms of a business model framework to be able to look at the types of, individuals, students, grantees, etc., that you support, and what segments you might be supporting them in.

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Eric Curtis

And really what value you are delivering. And what this allows is a really niche and customized solution. It's very hard moving into the future to be able to look at large pools of individuals that you serve, and then develop solutions in an aggregated mentality versus really start to dissect things that are customized level, either for a particular individual or a group of individuals.

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Eric Curtis

And what this allows you to do is to deliver value in a more customized way, whether that's through the use of data, technology or enhancing service design. So this first part of this canvas is really looking at the customer segments, the value and the way and manner in which those relationships and channels, those services are delivered.

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Eric Curtis

On the on the other side, on the left hand side is looking at what partners are force multipliers to us, or ones that support our capacity and bandwidth. And then how do we look at some of the activities that we're doing, change those or resources that we need to bring on that we might not have? Right. Those are the capabilities needed for the future.

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Eric Curtis

And then everything obviously needs a financially sustainable, model in terms of dollars and cents. And so there needs to be a look at the revenue and the cost structure. And this is a simple framework when you're thinking about innovation in the organization, to add into the strategic planning process for ideas to be, for ideas to find their way into using this framework as a common language to present changes for an organization.

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Eric Curtis

And really what it does is it breaks down into three different categories. There's a client focus, a capacity focus, and a financial focus. Kind of the three elements for generating ideas. So for example, if I wanted to change the way that we delivered a particular service, right. And, and I want the staff that lead that service to go analyze that at a more detailed level.

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Eric Curtis

I might give them this tool as a common as a standard framework and common language to be able to present back to me, to be able to see what they are redesigning or improving, within a particular program, or service. And so the, the benefit of this and utilizing this from an innovation standpoint is to be constantly reinventing yourself.

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Eric Curtis

Right? So if you look at the stages of a company, from birth to growth to maturity to decline, if, if, if we know that we're reaching a point of, of growth, or, and starting to move into that maturity phase, we want to start to reevaluate from a place of strength how we do something. Because when we're in a place of decline where we're not in a good decision making, place, to be able to look at reinventing ourselves.

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Eric Curtis

And if we're growing really fast or we're just a new company, we really need to have our business model proven first before reinventing it. And so this is just looking at the life cycles of an organization and start to look at maybe you have a particular program that's, outdated that needs, needs a refresh. And being able to use the business model canvas to think through, innovation differently.

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Eric Curtis

And so that's just a little bit of, insight as to how you might be able to, enhance strategic planning and a particular tool to be able to use. But as we all know, structure follows strategy. And as organizations start to implement and execute, this is kind of the area we want to focus on the most for our presentation with you today, because this is where we see the highest level of change, in an organization, in terms of like the need or leadership's attention.

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Eric Curtis

So organization design and performance management. So, many of you might be familiar with the book Good to Great by Jim Collins. This is a famous quote from from that book, which is pretty much the basis of organization design. And as we move into the future, there's so much changing with the types of talent and capabilities and things that we might need as an organization.

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Eric Curtis

It's up to leadership to be able to drive the changes needed for an organization to tackle the disruption that's happening, and, ensure the future viability of the organization. There's before I get into the definition of what org design actually is, there's three main reasons that you would actually use this construct that we're going to go through.

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Eric Curtis

One unfortunately is the really negative side. And that's workforce reduction. So for example, if there is funding cuts that affect a program or service that you deliver, you might have to reduce the workforce in that area. If there's a state of financial crisis, that an organization is undergoing, it might have to reduce the workforce in a particular area.

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Eric Curtis

The other the other area that we see or design is on the integration of a merger or an affiliation or a partnership that, those economies of scale and understanding that new structure of a combined organization, needs to be looked at in, in a lot more detail. And then lastly, which is our definitely our favorite is that, an organization has undergone rapid growth.

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Eric Curtis

And as a result of that rapid growth, they have broken their infrastructure. Right. And so congratulations, you're victims of your own success. And as a result of breaking that infrastructure, a new type of organization needs to be built to handle the level of growth you're now operating at. And so when we look at what organization design actually is, it's structured around these five pillars.

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Eric Curtis

So the first is talent. What type of talent do we need to deliver the right service. Do we have the right people in the right seats doing the right work. And is there role clarity there? And even under talent, we're also looking at do people understand their KPIs which are key performance indicators. Meaning how am I measured based on how am I doing?

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Eric Curtis

The second piece is structure. How are we designed as an organization from a management perspective? From a spheres of influence perspective within an organization to manage at this new level of scale that we might be operating at. And then third is capabilities. And this is often overlooked and something that's essential. What are the capabilities needed for the future that we do not have at all or that we need to dramatically enhance?

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Eric Curtis

Right. So think of technology which often comes up in this discussion. Do we have a chief information officer? Do we have the right cybersecurity framework? Do we have the right data solutions? Things of those natures tend to come up as a part of this discussion. And obviously people are going to be leading that those categories, those initiatives, do we have those capabilities internally.

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Eric Curtis

And if we do, do they need to be enhanced? The fourth one is core process. How are we designing process, looking back at that business model, the way and manner in which we deliver value and service. And this is really important. And to give you an example here, we did a project with a very large client, and we mapped out their process within one of their particular programs.

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Eric Curtis

And what we found was that, you know, of the of the 20 steps, let's say that that process consist of they were using manila envelopes handed from desk to desk, and several of those Excel spreadsheets in several of those steps. And then they were in the last few steps doing massive data entry into electronic health record system. So rather than create this multi-step, multi use multisystem approach to how data is managed in evaluating that process, we understood that the as is the current situation and we're able to change all of that just to use the electronic health record system throughout a whole process which built a tremendous amount of efficiency, and capacity, for

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Eric Curtis

that organization. And then lastly is systems. So the systems that we use enable us to do two things. One, to set the process by which we want people to capture information or deliver a service. But two, they allow us to manage at scale more effectively. It's really hard to operate on paper or Excel, and things like that.

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Eric Curtis

If we are a larger organization and the more we grow, the more complex and robust our systems use becomes, whether that's the financial management systems that we use, the Ria systems, or just the enterprise platforms that an organization might use as they reach a very large size. And so this is what makes up, organization design. And we're going to dive into a little bit of this, in specific areas around structure and talent.

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Eric Curtis

But really just the purpose of this, and as I talked about, the key theme of the presentation is acting intentional. It's critical for the CEO and the and the, the senior leaders of an organization to be able to allocate time throughout the year to work on the organization. So much of our time is spent working in our job, right.

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Eric Curtis

But it's forcing that time and space to be able to work on the business. Right. And that could be through strategic planning. You're allocating time to work on where you're going as an organization and then organization design, which is allocating time to figure out how do we function and operate more effectively at the scale that we now are, or the scale that we want to be.

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Eric Curtis

And there's different conversations that happen. You know, if we're looking at the whole organization or a specific department or a specific team or even an individual employee needing to understand their role more effectively, and the KPIs that are tied to that, and that will also lead to a succession discussion that we're going to have. Some of the challenges that we see under that talent.

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Eric Curtis

Tenet for org design is that a lot is changing, and it's getting more and more complex and, to, to, to manage folks. And we want to make sure that we are developing and training people for the next levels within the organization. All right. So what does that look like? Well, we have evolving capabilities, meaning up a training need for workforce.

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Eric Curtis

And that could be around technology or new ways that we want to be able to deliver service. There could be a scarcity of, talent in the marketplace. So we have to compete for that talent. That could be through higher salary structures, and then we get into kind of having to level set, or salary compression challenges. It could be job readiness.

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Eric Curtis

The people that we're bringing on might not be ready fully to tackle the job. So how are we planning to develop them in a short time period for that level of readiness? And then a major culture change is moving to performance management. And that is what we're going to talk about coming up. This all helps to build a culture that leadership wants to be able to, build and develop.

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Eric Curtis

And the way we look at achieving some of this is through these three lenses training, developing and upskilling. So as we talk about succession planning throughout a whole organization or we're looking at bringing people on into specific roles and making sure that they're ready, we want to be looking at all of that holistically through these three lenses.

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Eric Curtis

And so if we look at training and really what this is about is getting the people that are new to a job position, the job function, able to do it on their own. All right. So we bring somebody in, we hire somebody new. Do we have the appropriate training curriculum in place so that they can go, on their own and be self-sustaining in that role?

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Eric Curtis

Now, in a lot of job functions, people are in those roles for five, seven, ten plus years. And if we're not looking at developing them in those particular areas, the only training they're getting is either on the job or the initial training that we gave them. As part of step one. So how are we intentionally designing career paths and development within a particular role?

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Eric Curtis

And then, as we all know, bench strength has been a huge challenge. Which is why leadership succession, a lot of times when CEOs or senior leaders are retiring, organizations are going external to look for talent versus internal because they don't feel they have the bench strength. A lot of time and attention has not been given to upskilling people.

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Eric Curtis

So as we develop people to be really good in their current role, how are we developing them and assessing them? More importantly, to see who's ready for moving up to the next level? And that's that mentorship and leadership development. And so when we look, when we think about talent development or training, looking at it through these three lenses helps you to figure out how to get somebody ready to do their job, improving them in their job, and then assessing and providing them a pathway for the next level up.

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Eric Curtis

And the goal around all of that is to truly build a culture of performance. We want individuals to be able to perform because the more they perform, the the better. A team, a department, an organization is going to do. But turning a culture from. Yeah, we don't really measure much right now to measuring a lot of things for performance is a huge cultural change, right?

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Eric Curtis

It all starts with figure out what what do we want to measure and track? How do we design rewards and recognition for team members around that? Do management know how to coach to performance based off of metrics? Right. And then how are we developing those skills to kind of double down and ensure that we're continuing looking at building that culture of performance.

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Eric Curtis

And the reason we want to do this is performance is the basis of morale. So if if team are teams are performing, morale is higher. Right? You can you can equate it to being stuck in traffic. If we're stuck in traffic and we're not moving, we're probably pretty frustrated. Right? We're stagnant. We're not moving. You're probably not very happy versus we're going 65 miles an hour down the highway.

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Eric Curtis

There's no traffic. Things are going really well. You feel that momentum, you feel like you're getting places. And so your morale is in a different place than it would be if you're stuck in traffic. And the same thing

goes to people understanding how they perform in their role. Right? So if performance is the basis of morale and you can define how somebody can perform with key performance indicators, meeting metrics that you use to track how they're doing, and then being able to coach to moving that needle up or down, then that's really powerful, especially if you're incentivizing around it.

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Eric Curtis

Now, the challenge exists on this side is that when you have bad performers that are protected, right. Like, we know certain people within an organization might not be performing where we want them to be, but we kind of ignore that. Right? And so when you protect bad performers, you get more bad performers to protect because it creates the type of culture that's acceptable from a leadership perspective versus looking at defining how people defining the roles defined in the clarity of those roles and defining the performance measures of those, and then training the individual on that and then holding them accountable and management accountable can change an entire organization.

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Eric Curtis

So here's an example of what that looks like. We have two identical org charts on either side here. And if we start to measure everything meaning individuals have key performance indicators right. We can look at it from a red yellow green framework. Green meaning they're doing great work. They're rock stars. Yellow means they might be struggling. They need some time and attention, and then red means they're really not doing well, in their role.

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Eric Curtis

And we can look at situations like these two org charts here if we're tracking that data, because it's going to tell us a couple things. One, the org chart that has the three, sorry, the four green boxes and the yellow one tells me that everybody under that chief operating officer is performing really well, maybe with the exception of one employee.

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Eric Curtis

So really what that tells me is I have an employee that needs attention. If I look on the other side with the three red boxes and the two yellow boxes, what that's telling me is people in that department are not performing at all. In fact, they're struggling. And so my tendency might not be to go look at those red,

yellow and greens, but look at the chief operating officer and how they are managing and are they being effective.

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Eric Curtis

Right. And I wouldn't be able to really decipher that as an issue unless I was reviewing and looking at key KPIs. Because as we all know, you know, a coach slash manager can make the difference in a high performing team. And so if I know that through being able to look at a lens like this, I can then address it as a manager and a leader.

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Eric Curtis

Now, in making some of these changes and going to try to build a culture of performance, you normally have, folks that aren't going to come along for the ride. And, and those are your laggards. Those are, individuals that don't want to change as you are trying to drive change within a particular organization. Right. And so looking at how that plays out and identifying those individuals to, to see whether or not they should come along for the ride with regards to the future of your organization.

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Eric Curtis

And so there's there's a lot of benefits to being able to implement some of these tools around org design. And performance. Because again, performance being the basis of morale, if, if I have role clarity and know how I am measure accountability goes up and we've heard that word a lot with a lot of our clients is like, how do I hold people accountable?

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Eric Curtis

How do I ensure they're accountable? Well, you have to empower them, but you have to empower them around a framework of role clarity and performance measures. You want the work to be efficient, as as it's getting done. And you'll recognize that from having, key performers and then being able to reduce the duplication of effort, which you might see with two organizations coming together, or which you might see from, undergoing rapid growth.

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Eric Curtis

And, and in that process of going through growth really quickly, you're just grabbing people and putting them in seats. And then you quickly realize, as you start to dissect that the complexities of your organization, there's a lot of redundancy and duplication and maybe even gaps. One of the biggest things that installing a performance, a culture of performance supports is it identifies those people that are busy versus productive, right?

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Eric Curtis

The ones that are look, that are looking busy, in their work versus are being productive, in their work. And, and in doing this, it creates a lot of positive cultural impacts, for the morale and staff satisfaction and things of that nature. But it's an incredibly hard transformation to make from a leadership decision making standpoint. And so, you know, the, the, the org design piece is a key element for how organizations are looking at changing the way they do things to be ready for the future, which pretty much is here now.

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Eric Curtis

And assessing some of those, ways to change as an organization. And I will say this, that the, the psychology of change as a leader is very, very difficult because not only are you giving up things that, you know, you're moving into things that you don't know and you don't know how to lead around. And so there needs to be a lot of thought put into, the detail of what you want to evolve to in that change process.

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Eric Curtis

And org design helps with that. Another level of disruption that we're seeing in the market is, is that there's a lot of partnerships happening, in a lot of great, different ways from, mergers to, affiliations to shared services to other strategic levels of partnership. One of the reasons that that's happening, obviously, is technology is shrinking our world, and there's competition and costs, rising.

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Eric Curtis

But the other thing is, if we look at Massachusetts, there's over 47,000 nonprofits in Massachusetts and 38,000 of those are 580 threes. And if we look at just a particular sector, let's say human services, there's

over 3000 human services, supporting, the Commonwealth with 7 million people as a population. So the substantial amount of market saturation and when you have market saturation, if I wanted to grow as an organization and enter new geographies, that might not be easy to do organically, I might have to do that through strategic partnerships.

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Eric Curtis

And of all the strategic partnerships that we have helped facilitate, this is a lot of the strategic rationale that has come out of those discussions. So normally when we're in partnerships, discussions addressing disruption and building, a larger unified organization, we ask the boards and the senior leaders, like, why do you want to do this in the first place?

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Eric Curtis

And of the many, many conversations that we've had, these are the things that typically rise to the top as strategic rationale for doing so. Which, you know, some of these are really intentional and really great, you know, mission continuity and retaining, retaining talent, building out technology capabilities or capital for technology investment. Some of the more challenging ones is if there's a state of emergency relating to a financial situation, that that's a very challenging conversation to have.

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Eric Curtis

And then obviously, succession planning leads to to quite a bit of strategic partnerships. And this this tends to be the reasons that we see, a lot of organizations, moving into considering partnership as a means of addressing disruption. The process really looks at three phases, right? When, when when we realize we need a capability or we need something, whether that's growth or, or resources or things like that.

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Eric Curtis

The first conversations really around planning, it's planning with the board. It's how do how do we source this? How do we how do we go identify a partner? We've we've never done that. We don't know how to do it. What's involved in that conversation. And usually that's about defining strategic need, which might come from a conversation about what programs and services you want to enhance, what geographies you want to be in, what size partners make sense, and then what are you looking for in in a partnership.

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Eric Curtis

Right. So it's kind of some of those relational conversations that need to happen so that, you know, as an organization going into any discussion, what that all looks like prior to opening any doors. And let's say you you do have a partnership going and you're trying to architect what that looks like is, is this, a merger or is this affiliation?

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Eric Curtis

Can we do some shared services together? Like how do we want to build this partnership and architect this, agreement together. And, and that's when you get into things like negotiations and due diligence and, and aid, and all different types of planning around governance and things of that nature. And then once that partnership has been kind of consummated and that contract in whatever way, shape or form that is, designed is is complete and you have the closing date, you know, you have some integration planning that you need to be able to do and really that integration piece is around those five tenets of org design.

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Eric Curtis

And it's looking at, okay, now for this new partnership, we have this new level of scale and complexity. How do we look at talent and capabilities and structure and systems and process? Because those are different lenses that we need to look at things because we might be creating something, a new, and then the, the purpose of, of, of partnerships is really about stability and resilience, as we saw coming out of Covid, there was a tremendous amount of strategic partnerships form.

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Eric Curtis

And I think as the market gets more and more complex, we're seeing more and more and more of those take shape. And, and it's it's important that an organization be able to protect its culture or find a cultural partner that is aligned to, to their values and, and their leadership philosophies and serves similar communities, or has that kind of vested interest in those communities?

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Eric Curtis

And because it's different than a for profit, partnership and for profit partnerships, what happens is there's usually a financial exchange, right? One organization is buying something else from another. There is no financial exchange in nonprofit partnerships. So everything moves at the speed of trust in relationship. And even though you might be getting a great value with a particular partner around shared resources, talent, technology, or expanded geographies or whatever, there has to be that trust within that relationship because there's no financial benefit.

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Eric Curtis

And I think that's one area that the for profit companies could learn from. Nonprofit partnerships is taking the time to build those relationships, because if done right, the integration side goes a lot smoother, than you would have if it was just a plain financial transaction. And so looking at these three areas from the, the business model transformation that organizations are going to to org design and how to build a culture of performance to strategic partnerships.

00:37:19:07 - 00:37:56:17

Eric Curtis

This is all about acting intentionally, for your organization and building the future. For, for the organization and keeping momentum. Right. Because the challenge in leadership decision making is that when so much pressure is compiled on you, some sometimes like avoiding decisions is is easier than making them. But when we make them, we build momentum. Whether those decisions are right or wrong doesn't matter, as long as we are building momentum in a direction and we will learn from the rights and wrongs throughout those decisions.

00:37:56:19 - 00:38:40:24

Eric Curtis

And that's really where we see some of the most successful organizations, is they don't stop moving under tremendous pressure and things of that nature, and they make the hard decisions and they keep that pace going. And then they learn from any mistakes made and then incorporate those changes and learnings back into the organization. But that momentum is what sustains them through a lot of the disruption cycles that we're seeing right now, obviously, with, with technology and AI and the way business models are happening and funding pressures and all of those different dynamics that might affect your organizations, ensuring that you're acting intentionally to move is essential.

00:38:41:01 - 00:39:02:02

Eric Curtis

And so I did promise that. I did promise that we were going to stay on and have plenty of time for questions. And, wanted to kind of open the conversation up. And maybe the Rockland team can help me facilitate, some of the Q&A in the chat. But if you have questions, please throw them in the chat.

00:39:02:02 - 00:39:27:06

Eric Curtis

I'm happy to answer anything. Even if we didn't cover it today and something that you want to explore, or specific case examples you'd like to bring forward. Happy to kind of run those scenarios. Now with you.

Andrea Borowiecki

Thanks, Eric. Good morning everyone. We have a few questions in the chat. Eric, what is your suggestion for organizational design when the nonprofit is run entirely by volunteers?

00:39:27:06 - 00:39:54:01

Eric Curtis

By the board? Yeah. So, when you have that situation, you still have a board responsibility of maintaining their fiduciary obligation and operating as a board, but then they are fulfilling as board members and volunteers specific job functions within the organization. Right? So let's say finance, for example, your treasurer might also be your for lack of a better term, your CFO.

00:39:54:03 - 00:40:17:18

Eric Curtis

Defining those roles and separating them out enables them to know what hat they're wearing. Right. So, for example, what is the role of the finance director for a volunteer? What is the role for an event coordinator as a volunteer? And we use what we call a job pack framework as part of our org design process. And PAC is an acronym.

00:40:17:18 - 00:40:43:10

Eric Curtis

It stands for purpose, activities and KPIs. What's the purpose of the role that you're trying to create? What are the top five key activities? Because if everything's important, then nothing is right. And then how do you measure success? And so really what you're doing is you're building a management framework even for volunteers, so that they then know who owns what and what those outcomes are going to be that they are operating on.

00:40:43:10 - 00:41:12:24

Eric Curtis

Now. It's a challenge because it's a volunteer board. But if they're going down that road and there's any kind of confusion of clarity, who's doing what and what are things do to define ownership that can solve for a lot of turmoil that might exist to the board, caused by lack of clarity? Great. Thank you. Our next question is what strategies can be used to retain high performing, experienced employees who recognize and are affected by workplace challenges?

00:41:13:04 - 00:41:40:15

Eric Curtis

Yep. So if you have a high performer, and they are an absolute rock star and you want to protect them, recognition goes a long, long way. A lot of time management spends a lot of time on dealing with low performers. Right. And so what the team around them sees is the time, energy and attention going to low performers when the time, energy and attention should be going to high performers.

00:41:40:17 - 00:42:02:01

Eric Curtis

Right. And the more time, energy and attention you can give them and recognition, that is one massive strategy that goes a long way. And then and then also reviewing what the pay scales are within an organization. And do you have the appropriate pay scales, for that particular function. And is this high performer at the top of that pay scale?

00:42:02:03 - 00:42:31:02

Eric Curtis

If so, and then are there any is there any room for promotion within the organization? And how are you upskilling them so that they can see themselves in the future, 3 to 4 years down the road in a potential position which you might not be able to promise at that point in time, but you can develop them towards and talk to them about doing, whether that's through goal setting of career aspirations that they want to achieve.

00:42:31:02 - 00:42:50:07

Eric Curtis

That could be kind of laterally and up or directly up within their role. And if those positions aren't going to exist, let's say that they're the chief operating officer and the CEO has no plans to retire for the next 20 years. Right. You might only be able to retain that chief operating officer for the next five years.

00:42:50:07 - 00:43:20:19

Eric Curtis

And then they're most likely going to be looking at going elsewhere to achieve a CEO position, which means you have succession planning concerns that you need to undergo, but also you want to continue to support that chief operating officer as a high performer for to to retain them and also to coach them to a CEO position if you want to see them, you know, moving up because a lot of times people will leave an organization and then they might come back, at a higher level.

00:43:20:20 - 00:43:28:00

Eric Curtis

I hope that answered your question.

00:43:28:02 - 00:43:32:20

Eric Curtis

Yep. You're on mute. I think.

00:43:32:22 - 00:43:54:16

Andrea Borowiecki

My apologies. What are some strategies that you would suggest to encourage leadership to be more innovated instead of stuck in the past?

Eric Curtis

Yeah. So, that that's a great question. Innovation really doesn't exist. I shouldn't say it doesn't exist. It doesn't really come as much from the C-suite, you know, the senior leadership team as it does throughout the organization.

00:43:54:18 - 00:44:26:23

Eric Curtis

Right? So the people it's serving, serving the individuals that you are taking care of or providing value to in some way, shape or form are the ones that understand how to make improvements and changes. And you can use the business model canvas as a way for them to bring their ideas forward. Here's the challenge that exists with that, you empower your team throughout the entire all levels of the organization to be innovative and think about how to drive, change all those ideas start flooding up to management.

00:44:27:00 - 00:44:59:17

Eric Curtis

Management is working in the business too much and not on the business enough, and they don't allocate the time. So what happens is they ask for ideas and then those ideas go nowhere. And what you need to be able to do is create a process, a funnel to take well-intentioned ideas, put a structure like the business model canvas together so that people are then thinking through the different parts of a business that run from the value side of the capacity to the financial side.

00:44:59:19 - 00:45:25:24

Eric Curtis

Right. And it's also, by the way, it's also providing, workforce training because they're doing kind of like mini business planning to be able to present those ideas in a standard format. Then those ideas need a vetting process. And then once that idea is approved, needs to be empowered to that individual with the idea to drive the change because they're the ones that have the vision around it.

00:45:26:01 - 00:45:51:03

Eric Curtis

But what happens is sometimes management likes to hold on to something for either control or, or, you know, some other means and really, this is a time to, to be able to, decentralize some of that empowerment, obviously with some guardrails around it. And that's the best way that we have seen to foster innovation is create a process for it to come up, be assessed and evaluated and then implement it.

00:45:51:05 - 00:46:14:09

Eric Curtis

But normally it comes up and stops. So it's got to it's got to kind of see its way through, a whole process to be ignited in the organization because the folks down at your direct care, direct service level, are the ones throughout the whole organization. They have great ideas, and some of them might be small tactical ones to like, tweak this, and it improves this process.

00:46:14:09 - 00:46:35:22

Eric Curtis

And some might be major strategic kind of overhauls, which, you know, might have a lot of, a value to them if pursued.

Andrea Borowiecki

Great. During the growth phase, how can you build capacity at the right pace in an uncertain economy? How can you build capacity at the right pace?

00:46:35:24 - 00:47:08:04

Eric Curtis

So I'm going to start on the financial side. If you're growing really fast, ensuring you have the appropriate reserves, a cash cushion always, is a good start, to ensuring peace of mind around rapid growth in undertaking rapid growth. What happens is that things start to feel more and more out of control for leadership, right?

00:47:08:04 - 00:47:35:16

Eric Curtis

So you're growing really fast. And all of a sudden I don't really understand what's happening in the organization and who's doing what and things like that. So making sure that you have certain frameworks in place, for example, you're comfortable with the reporting structures of the organization. Maybe you as the leader need peace of mind around how decisions are made and who is making them and to what level.

00:47:35:16 - 00:47:59:00

Eric Curtis

And so you install a RACI framework. RACI is an acronym. It stands for responsible, accountable, consulted and informed. So it's a decision making framework that you can install so that I know I have

delegated decision making to the appropriate people at the appropriate levels. Anything of a certain type has to come to me or the senior leaders within an organization.

00:47:59:02 - 00:48:22:02

Eric Curtis

And then the other piece is ensuring that everybody has role clarity coming back to that job pack purpose, activities and KPIs. As you undergo rapid growth, what's going to happen is you may put a, job pack in place for a particular person. Let me back up. We all have job descriptions, right? Those job descriptions might have 65 bullet points on them.

00:48:22:02 - 00:48:44:12

Eric Curtis

One says, I got a smile. The other one says, I got to lift 35 pounds and then all of their duties as assigned. Right. So a job description is an HR risk management tool. There can be vague and lofty language in there. What you need to control growth is a management tool like a job pack really specific on the purpose, the five activities and the KPIs.

00:48:44:14 - 00:49:13:18

Eric Curts

And then you constantly review that as you're going through growth and adding in new people and you're questioning where should they go, who should they report to. But the biggest change is going to psychologically is going to be with leaders feeling like it's getting out of their control, which means they also need to decentralize decision making to not be at the top CEO level, start to empower people, maybe using the RACI framework that are below them to make some of those decisions.

00:49:13:20 - 00:49:37:18

Eric Curtis

There's also certain decisions that the senior leader must always be involved in. Right. And three of those those off the top, are any decision that could harm our brand, any decision that could harm a person, a decision that could put us in a financial crisis. Right. Those three kind of major decisions. You probably want to be at the table as a senior leader.

00:49:37:20 - 00:50:21:18

Eric Curtis

And then everything else you need to figure out how to decentralize. And I know I'm going a little bit longer with this question because there's, there's there's a lot to unpack there because this is part of the crux of org design. And and kind of the mentality of, of management is that, if we're looking at succession planning and ensuring that people below us are going to be capable to move up, we need to push down decision making on them that we might normally make as a leader, to see how they do to ensure that they're ready or are making decisions, through the appropriate lenses.

00:50:21:20 - 00:50:50:09

Andrea Borowiecki

Thank you, Eric. Next question. What are the best methods of strategic partnerships for financial strength? The predecessor to emergency?

Eric Curtis

The best strategic partnerships. So there's different types. The two most common ones. We see our mergers and affiliations, affiliations are probably less known. So affiliation is a parent subsidiary relationship. So you think of like how health care has formed over the years, right?

00:50:50:09 - 00:51:18:04

Eric Curtis

A lot of these hospitals have affiliated to or become subsidiaries to a large health care system. So, both have strengths and weaknesses, pros and cons. Right. With merger, you are dealing with a tremendous amount of decision making that needs to happen around the brand, the boards, the leadership team, and in affiliation. You're dealing with big decisions around who's the parent, who's the subsidiary.

00:51:18:06 - 00:51:48:23

Eric Curtis

And, you know, those are kind of structural conversations. But the real question is like, what do you need and why? And, and for the organization to be clear that they need a partnership in the first place. And, you know, who best fits or what type of organization would fit the bill, right? So it's almost like creating that rubric of, of analysis before opening the door to conversations so that you don't get emotionally tied to a particular organization.

00:51:48:23 - 00:52:10:17

Eric Curtis

You've kind of got a standard vetting process to be able to look through, and that might be that vetting process. You know, number one thing on, it's going to be cultural and leadership alignment, you know, is this organization culturally values based, aligned to us. And you find that out in relationship, right. And then the others might be, you know, are they financially stable?

00:52:10:17 - 00:52:32:10

Eric Curtis

Do they have a good brand reputation? What's their focus on quality? You know, or any, any other key metrics that you guys might use to evaluate success? And some of that stuff can be done in pre diligence, meaning like looking at their website, their 990 forms and things like that. Others might have to be done. You know, sitting in a room having coffee together.

00:52:32:12 - 00:52:57:00

Andrea Borowiecki

Okay. Next question. Are you seeing trends of more mergers happening among smaller organizations, larger organizations, or is it more likely acquisitions by larger organizations?

Eric Curtis

So the number one thing we're doing in every sector that we're in right now, and we are finding and it's scary, I mean, like, it's scary from like a change management standpoint and a leadership standpoint.

00:52:57:00 - 00:53:21:15

Eric Curtis

Like I get that, there's a lot of organizations realizing that they need partnerships, or, or that they're seeing larger providers coming in to the market. Right. I know we just had the first $1 billion merger in the country happened within the health and human services sector, meaning an organization came together and they're now $1 billion in size.

00:53:21:17 - 00:53:53:17

Eric Curtis

That brings a lot of resources and and scale and leverage and influence and things of that nature. I think the challenge that exists that we've seen, is trying to figure out ways, methodologies and structures to protect that local element, right? Like if we serve a particular community and that's all we serve and we're really small, we need to be able to protect that in some way, shape or form to not be swallowed up by this large organization.

00:53:53:17 - 00:54:21:06

Eric Curtis

And so there is something to be said about and it's probably, a cliche, but, you know, acting global, acting globally and operating locally. I think are essential to be able to look at and, you know, if you're, if you are partnering, you know, size disparity and things like that, there's a lot of things to consider when you're getting into those conversations.

00:54:21:08 - 00:54:35:03

Andrea Borowiecki

Thanks, Eric. How does a nonprofit navigate a governmental funding source, aka state contracts, that engages in some of the nonproductive practices that you've highlighted?

00:54:35:05 - 00:55:27:01

Eric Curtis

Yeah, that's that's, a very challenging question. I think that innovation is not born in government, in innovation is born through providers being funded. And, you know, having the ability to advocate back to state funders on new ways of delivering service may or may not be effective. It's it's a real challenge because when you're trying to innovate, you know, states try to fit you into a preexisting funding model which might have compliance and procedural requirements or staffing ratio requirements, don't that don't apply to the type of innovation that you're proposing.

00:55:27:03 - 00:56:00:09

Eric Curtis

And and so sometimes you need to take that out of, you know, any kind of new innovation or model that you want to test. It's like other that funding element. And, and maybe try to identify private funding to pilot the concept. But scale it way, way down, pilot it through private whether that's foundations, giving or individual donor giving, and pilot and test that build proof of concept, build a case study, remain in constant conversation with funders.

00:56:00:11 - 00:56:27:16

Eric Curtis

To be able to let them know the differences in success of that new innovative model versus the old one and see if you can drive change. But it's an uphill battle. Okay. Thank you. And we'll, finish up with one more question. In times of rapid change in resource constraints, how should nonprofits think about the role of marketing and communications not as an expense, but as a strategic tool?

00:56:27:18 - 00:56:55:13

Andrea Borowiecki

What approaches have proven most effective in maintaining trust, visibility, and support? All right. So not knowing the sector that you are in, let me let me try to do my best here. I'm going to look at communications from two angles. The first is internal. As you're undergoing any kind of change or disruption, you're feeling it and your staff are definitely feeling it.

00:56:55:15 - 00:57:16:00

Eric Curtis

Right. And so having internal communication with your team to let them know, hey, what's going on? Where are we moving towards? What what is happening? What decisions are being made? What have we achieved? What small wins are we celebrating? Who are we recognizing? Those types of things? Are essential because that's going to maintain your culture and focus on that internal communication.

00:57:16:06 - 00:57:39:24

Eric Curtis

Because as you as leaders are feeling the disruption, so is everybody else. Right? And so being able to acknowledge that but also share some of the things you're doing to keep that forward momentum going, or recognize those staff is essential. The external side, it depends on, what you're focused on and how you deliver services.

00:57:39:24 - 00:58:01:19

Eric Curtis

But let's say if you weren't state funded and referrals weren't coming into you, right, you have to go attract, attract a market and be relevant within a particular market. You need to be able to communicate with them. So communicating, on a marketing side, I think it's important to distinguish the difference in today's day and age between analog marketing and digital marketing.

00:58:01:21 - 00:58:32:12

Eric Curtis

Right. So analog marketing, you know, it might have been nice to throw a full page ad somewhere to, you know, in the Boston Globe to say, here's who we are and what we're doing, the value we're creating, etc. but in today's digital age, people are being found through search engine optimization or AI optimization. Right? And we're moving even away from web browsers into people using AI to identify, hey, who's the who's the best at this or who who's the leading organization, right?

00:58:32:13 - 00:58:59:14

Eric Curtis

Think about maybe how you find a restaurant to go out to. You might use AI to do that. The way people are learning about organizations externally, and, and building awareness around that is now through AI. So from a marketing perspective, keeping the eye on some of those new and latest ways to stand out through, through the crowd is probably essential.

00:58:59:16 - 00:59:26:07

Andrea Borowiecki

Appreciate everybody taking the time today. To join in, I want to, I'm very grateful for the Rockland team, for having me, for your questions. I really appreciate that. And, I'm going to hand it over to, Brian, who I think has some announcements.

00:59:26:13 - 00:59:48:01

Brian Mason

Hey, thank you so much that that was a fantastic presentation.

I feel like the group of us here could have sat here for another hour and. And fired a bunch of questions. Actually, get your take on a lot of different things. So, so thank you so much. And in addition to this presentation, Eric has been generous enough to offer a 15 minute consulting Q&A session to any organization that attended today, which is tremendous.

00:59:48:01 - 01:00:06:12

Brian Mason

So, everybody can feel free to reach out to Eric. Obviously his contact information is up there on the slide, to try to coordinate that. So, so, Eric, thank you so much for offering that to everybody. And to everybody that attend today. Thank you so much. You will be getting a survey by email.

01:00:06:12 - 01:00:31:24

Brian Mason

So we would really appreciate, if you complete that, it'll help us determine future sessions, topics, things we can do to improve upon these. And that would be, much appreciated if you could complete that. And we're really excited to announce that we've scheduled our second, session. It's going to focus on, volunteerism and creating a roadmap to recruiting volunteers.

01:00:32:01 - 01:00:53:13

Brian Mason

We've locked in a date for that. It's going to be Thursday, April 8th. Similar time. We'll start it at 830 in the morning, and it will be a virtual setting just like this one once. And I want to reiterate that both these slides and this recording will be sent out to everybody and also available on the Rockland Trust website.

01:00:53:15 - 01:01:07:04

Brian Mason

So again, Eric, thank you so much for being here today. Thanks, everybody that attended and we look forward to hosting everybody again in early April. And best of luck getting continuing to dig out everybody. Thank you.