Less Is Really More

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Nonprofit execs often worry they don't have enough handbooks, manuals, and guidelines setting forth the organization's risk management policies. This article suggests that the real worry should be that those documents are overweight and inefficient. The article suggests ways you can streamline and energize your program-policy documents.

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A leader of a nonprofit organization recently shared with me his concern that the youth-serving organization he leads had a policy deficit. "I'm just not sure — from a risk management perspective — that we have enough policies in place," he mused. The fear expressed by this particular nonprofit executive is not unusual. Concern about a possible policy deficit is widespread among leaders who are engaged in a review of their risk management practices. Many begin the process with a deeply held view that the "answer" to inadequate risk management is more policies.

During the past 10 years, I have had the opportunity to work one-on-one with dozens of nonprofits that have made the commitment to strengthen their risk management practices. As I reflect on this tapestry of varied assignments, a common thread appears: the existence of policies that were:

- created to address concern about risk
- written by a thoughtful attorney working pro bono for the nonprofit or written by a non-lawyer who "adapted" a policy of another organization
- at one time distributed to key personnel in the organization
- supplemented with additional words, pages or volumes of material as the organization's needs evolved

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A nonprofit's key risk management policies might include the Employee Handbook, Volunteer Manual, Crisis Management Plan, Facility Safety Guidelines and other sets of documents or materials that set forth the policies intended to protect the mission and essential assets of the organization.

A close examination of these policies reveals another set of common truths–this time with important risk management implications.

- Policies often contain inconsistent statements. This is probably due to the nonprofit manager's skill with the "copy" and "paste" features of the word processing program. It has become easy — too easy, perhaps — to simply copy the policies of another organization without giving any thought to whether the copied material conflicts with the nonprofit's existing policies.
- New personnel may be left out and left behind. Staff turnover is a fact of nonprofit life. This reality places an enormous burden on an organization to manage the distribution of policies with care. Essential policies are rendered ineffective if staff and volunteers don't know about their existence.
- Deliberate disobedience is more common than you think. The leader of the nonprofit discussed at the outset of this article told me that his staff are very good about following the organization's policies. Yet when I spoke with staff members in various locations throughout the country, I learned that many staff disagree with some of the organization's policies and have chosen to ignore them or do the opposite of what is required.
- More volume may provide less protection. The impressive length of many nonprofit policy manuals is generally the result of good intentions; leaders believe that adding new policies to an existing manual will add emphasis to key issues. But this encyclopedic practice can be a recipe for disaster. If you overload staff with a voluminous policy manual (whether printed or electronic), you run the serious risk that overwhelmed readers simply will not retain the essential messages buried within.

Lessons About Less

My increasingly common response to leaders who ask me to advise them whether or not their nonprofits need "more policies," is to explain: They probably need fewer, more concisely written policies. And they may need to spend additional time communicating and reviewing policies with key personnel. One of my favorite tasks in a policy review assignment is to target sentences, paragraphs and sometimes even entire pages for deletion from a policy manual. If while reading this article you have begun to think that your own policies may need a weight loss program, consider the following five-step solution:

1. Re-read the essential policies of your nonprofit to detect inconsistencies. Resolve inconsistent statements.
2. Review your policies a second time for nonsensical or overly convoluted sentences. Rewrite them in simple language that every employee will understand.
3. Review your policies a third time to identify language that adds weight but not substance. Separate nutritional language from calorie-laden and sleep-inducing words that will send readers to the lounge for a nap. Delete any sections that fail to fortify your staff's understanding of essential policies.
4. Consult your nonprofit's legal counsel about the implications of moving forward with your revised, slimmed-down policy manual.
5. Take your revised manual for a test drive — conduct a focus group to determine if your revised policy document meets your goals with regard to clarity and consistency.