Nonprofit Risk Management Center

VOL. 34 • NO. 1 • SPRING 2025

Risk Management ESSENTIALS

Tips, Knowledge and Tools for Nonprofit Organizations

Risk Summit 2025: Building Bridges

Save the Date

The 2025 Risk Summit will showcase innovation in risk management in the nonprofit sector.

The NRMC team is excited to host an in-person event for the 2025 Risk Summit! We'll convene at the Hyatt Regency Reston in Reston, Virginia, October 27 and 28.

This special educational event will bring together nonprofit leaders and industry professionals who support nonprofit missions. The 2-day conference will include educational sessions, in-person networking opportunities, and evening social events to build and develop relationships with like-minded sector professionals.

Visit 2025risksummit.org to learn more about the summit and register.

To learn more, visit nonprofitrisk.org.

Call 703.777.3504 or email info@nonprofitrisk.org for more information.

Background Screening for Nonprofits: What to Consider

By Rachel Sams

When making job offers in a previous role, I often said some version of the sentence: "I want to let you know that this offer is contingent on the completion of a background check."

Several job candidates shared very personal information about themselves at that moment, such as past debts, arrests, or convictions. They wanted to proactively disclose those things in case they showed up on a background check.

Background checks can serve as a tool to help you determine whether a prospective employee or volunteer has a history that would make them ineligible for a role. But background checks can also raise challenging ethical and legal issues and prompt you to reexamine your nonprofit's values. Research shows that people from populations of color have more interactions with the criminal legal system due to systemic racism. Knowing that, should a criminal conviction automatically bar a person from working or volunteering with an organization?

Here are some things we encourage nonprofit leaders to consider as you ponder whether and how to background check employees and volunteers, and some ethical and policy guidance if you do.

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What Background Checks Entail

When many nonprofit leaders think of background checks, they imagine the scenario I described above: running a criminal history background check on a potential employee before finalizing their hire. But some nonprofits also background check active volunteers, especially those that work with youth or other vulnerable clients. And some nonprofits also background check board members before confirming their service. The latter type of background check—for governance versus operational roles—remains rare.

For nonprofits that do background screening, criminal history background checks are common. But other tasks on your hiring or volunteer recruitment checklist can function as background screening as well, including:

- verifying degrees, certifications, and licenses
- calling references
- reviewing social media accounts
- credit checks
- sex offender registry checks
- motor vehicle registry checks

Establish Disqualifying Criteria and Know the Law

Before you consider using criminal history background checks, establish disqualifying criteria for the role. What prior convictions are relevant to the role? Do not simply decide that anyone with any criminal history is ineligible for every role at your nonprofit; that approach is neither defensible nor appropriate.

Next, consider the federal, state and local laws that may apply to your organization and be triggered by the purpose of the background check.

More than half of U.S. states have some form of a "ban the box" law. These laws require employers to remove questions about convictions and arrest records from job applications. Criminal history background checks remain allowed later in the hiring process.

Federal agencies and contractors also cannot request criminal background information from job applicants before the offer stage, with some exceptions.

It's important to research state and local laws as well. For example, California requires background checks for all regular volunteers of any youth service organization to exclude people with a history of child abuse.

If employers use a third-party background check provider to screen potential hires, the Fair Credit Reporting Act applies with important requirements you need to understand. One requirement is a disclosure that the results will be used in an employment decision. Another requirement is obtaining the applicant's prior consent. And before an employer makes an adverse employment action—like deciding not to hire someone—due to information from consumer reports, the FCRA requires the employer to provide the person with a copy of their report and inform them of their FCRA rights. If an employer takes an adverse action based on information in a consumer report, they must notify the person and let them know they can dispute any inaccurate information on their background check with the screening company.

> "Before you consider using criminal history background checks, establish disqualifying criteria for the role."

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"At NRMC, we believe reference checks are the most valuable and useful background screening tool."

Tips for Non-Criminal History Screening

At NRMC, we believe reference checks are the most valuable and useful background screening tool. It's the first, and sometimes only, opportunity to learn about a candidate's talents and skills from someone other than the candidate. Done well, it can increase the likelihood of a good match between your nonprofit and an applicant for an employee or volunteer role. To make the most of reference screening, follow these tips.

- Include a statement affirming permission to verify information and check references on all applications for employment and volunteer service. Your statement should include language waiving the applicant's right to bring claims against the organizations providing or checking the reference.
- Determine what information you need to find out whether a person could likely perform the duties well.
- Create a standard script asking the same reference questions for all references for a specific position. (You might choose a different set of questions based on the nature of the position; if you do that, stick to that list when reference checking any applicant who applied for that position.)
- Identify yourself to the reference and briefly describe the position you're filling.
- Ask only position-related questions, including questions about past job performance.
- Don't ask any questions you could not legally ask the applicant directly.
- Limit the number of leading questions (those that can be answered with a simple "yes" or "no") when checking references. "Is this individual eligible for rehire at your agency?" is a strong reference check question. "Did this person enjoy teamwork?" is not.
- Record the information references share with you in writing.

You may be tempted to pull up an applicant's social media profiles to search for anything that might create reputational risk. The NRMC team strongly cautions against doing this. Information found on social media sites may be revealing, but the information you uncover may be distracting and irrelevant. For example,

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> "NRMC encourages nonprofits to consider criminal history background checks or credit checks only when they are relevant to a position."

does a gap between professional roles speak to someone's potential as your next Project Manager or CFO? Does the fact that an applicant attended a college you're not familiar with speak to their learning mindset? Definitely not. Approach this area with caution, and if you decide to do social media screenings, acknowledge the potential for bias and use these guidelines from the Society for Human Resource Management:

- Do not use a candidate's post to discriminate.
- Do not use personal information that is irrelevant to the job to make a hiring decision.
- Apply criteria for assessing posts consistently across all candidates. Create a process that identifies what you will screen for and disqualifying criteria.

Criminal History Background Checks: How to Decide

Many nonprofits have increased their work to address systemic racism in their organizations in recent years. Studies that show how systemic racism impacts the criminal legal system have led more nonprofits to question whether they should use criminal history background checks for employees and volunteers. Some nonprofits have implemented "fair chance hiring" programs to consider people who have criminal records for employment. For example, a nonprofit that provides services to people returning from prison may seek to hire employees and recruit board members with lived experience in the prison system. Our resource "Hiring Employees with Criminal Records: An Inclusive Approach" has much more information for nonprofits that want to implement fair chance hiring.

NRMC encourages nonprofits to consider criminal history background checks or credit checks only when they are relevant to a position. For example, some youth-serving organizations run criminal history background checks on all employees to avoid hiring anyone who has a history of crimes against children. And some, but not most nonprofits run criminal history and credit checks on applicants for roles who will handle funds.

Beyond those considerations, we encourage nonprofit leaders to map out an approach to criminal history background checking and fair chance hiring before it's time to make a job offer or recruit a new volunteer.

BoardSource has some great questions for nonprofits to consider as they weigh whether to conduct background checks on board members. Nonprofits could adapt these questions when weighing whether to

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background volunteers and employees, too. BoardSource's questions include:

- What are our goals in implementing such a policy?
- Will implementing this policy reinforce the social inequities our programs exist to alleviate?
- Will this policy keep our clients and our organization safer?

Document your policy on background checks in writing. Include information about how your organization will proceed if a background check flags a disqualifying offense (per your list of disqualifying offenses), and how frequently you'll conduct background checks (will you do them every two-three years after hire?) Choose a background check provider that offers the services you need and fits your budget. Find out if any of your insurance providers offer discounted background check services through a vendor arrangement.

Sterling Volunteers, which was acquired by First Advantage in 2024, runs background checks on nonprofit volunteers and allows clients to set disqualifying criteria for volunteer roles, said Executive Director Katie Zwetzig. Volunteer applicants typically provide their personal information to the Sterling Volunteers platform directly, and the nonprofit client receives a detailed report with any findings based on the screening package they chose. Sterling's most popular package includes a Social Security number trace, Department of Justice Sex Offender Registry search, terrorist watchlist search, validated nationwide criminal search, current county of residence criminal history, and monthly updates. Reports like this may show information such as case numbers and judgments.

Millions of volunteers have gone through the Sterling process, Zwetzig says. They receive a copy of their background check report, which they can share with other nonprofits if they wish.

"Our focus is to keep both our clients and First Advantage compliant with the laws and help to educate the industry on the complexities of screening," Zwetzig says.

Screen Judiciously and with Confidence

Nonprofits often reach out to NRMC seeking a simple answer to the question "Should we conduct criminal history background checks?" If you've read this far, you know that question doesn't have a simple answer. But answering it to the best of your ability can help your organization better put your values into practice. Consider your organization's mission, all applicable laws and regulations, and how you want to be in community with your team, volunteers, board members and constituents. Thoughtfully weighing those considerations should lead you to a good decision for your organization.

Rachel Sams is Lead Consultant and Editor at the Nonprofit Risk Management Center. Reach her with thoughts and questions about background checking for nonprofits at rachel@nonprofitrisk.org or (505) 456-4045.

RESOURCES:

There's No Mystery to Your History: Using Background Checks in the Screening Process – NRMC
https://nonprofitrisk.org/resources/articles/theres-no-mystery-to-your-history-using-background-checks-in-the-screening-process/

Hiring Employees with Criminal Records: An Inclusive Approach – NRMC
https://www.risk-resources.org/2023/02/28/hiring-employees-with-criminal-records-an-inclusive-approach/

Nonprofit Background Check Policy Considerations – BoardSource
https://boardsource.org/resources/nonprofit-background-check-policy-considerations/?hsCtaTracking=655865cd-2b5d-4f7e-973c-5e00be194218%7C11774538-e0bc-429c-81e0-7de6b690d252

Ban the Box – National Conference of State Legislatures
https://www.ncsl.org/civil-and-criminal-justice/ban-the-box

How to Use Social Media for Applicant Screening – Society for Human Resource Management
https://www.shrm.org/topics-tools/tools/how-to-guides/how-to-use-social-media-applicant-screening


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How Unionization Is Impacting the Nonprofit World

By Rachel Sams

The word "union" is being heard more frequently at nonprofits—from boardrooms and leadership meetings to employee chats in the breakroom or on videoconference.

Fifteen years ago, it was relatively unusual to hear about nonprofit unionization campaigns, but that's changing.

"Employees of social justice nonprofit organizations have been unionizing in record numbers," the authors of the "Beyond Neutrality: Navigating Challenges and Leveraging Opportunities of Staff Unions in Social Change Nonprofits" report, created with support from the Ford Foundation, wrote in 2023. The report found six major unions, plus affiliates, with active campaigns and contracts across more than 75 nonprofits. Those numbers, while they represent a very small percentage of the nation's nonprofits and do not reflect all union activity in the sector, continue to grow.

Increasing union activity is one of many changes to the nonprofit employment landscape that accelerated in recent years. Nonprofit employees have demonstrated, held strikes, and negotiated for higher wages and benefits. Disagreements between leadership and employees that might once have played out behind closed doors now spill over onto social media. And in 2025, many nonprofits that receive federal money face funding disruptions, which could increase union interest among nonprofit staff or impact the unionization movement in other ways.

> "If you're not already thinking about how union organizing could impact your nonprofit, we encourage you to."

At NRMC, we define risks as possibilities—events or decisions that haven't happened yet but could have a major impact on your mission if they occur. A variety of potentially disruptive possibilities come to mind for any organization with a new collective bargaining unit. Additional risks arise when relations between management and a current union become tense. Nonprofit unionization could lead to a more equitable distribution of power and greater employee satisfaction at an organization. It could also lead to conflict and tension, or a mix of positive, negative, and neutral consequences.

If you're not already thinking about how union organizing could impact your nonprofit, we encourage you to. If you are thinking about it, or currently navigating union formation, we have some guidance.

In this article, we'll explore the factors affecting nonprofit unionization; share guidance for strong relations with your employees, whether you have a union or not; and provide insight from a risk perspective on what to do and not

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“Gallup statistics show that public approval of unions has surpassed 70%, compared to 53% 10 years ago.”

do if your nonprofit experiences a union organizing effort.

Why Union Activity in Nonprofits Is Rising

Several factors are contributing to the increase in union organizing within nonprofits, said David A. Zonderman, professor of labor and nonprofit history at North Carolina State University. Research shows that younger workers are more likely to support unions, and nonprofits have significant representation of younger workers. Almost half of the nonprofit workforce was between the ages of 25 and 44 in 2022, according to a study by United for ALICE and Independent Sector.

Zonderman also noted that many people who enter the nonprofit field skew progressive politically and tend to look more favorably on the idea of organizing. And unions have begun more active organizing with nonprofits in recent years, he said.

Gallup statistics show that public approval of unions has surpassed 70%, compared to 53% 10 years ago. The federal government does not track statistics on nonprofit unionization, but about 10% of the nation’s workforce belongs to a union, according to the U.S. Bureau of Labor Statistics. That’s down from about 20% in 1983, which the BLS says was the first year of comparable data.

The Beyond Neutrality report describes unionization as a disruptive force that can spark positive change for nonprofit leaders and organizations, as well as surfacing big challenges. Many nonprofit employers support the idea of worker equality and power-sharing, but may not have the training, experience, or support to respond thoughtfully when a union formation effort arises, according to the report. And the report notes that nonprofit unionization is championing progress on racial justice in some cases, while impeding it in others. Even as unions put forward proposals to advance racial equity, some nonprofits may experience confusion about what topics must go through a bargaining committee and how unions impact existing racial justice work.

Given the many challenges nonprofits and their employees face, Zonderman expects interest in nonprofit unionization to stay high and thinks more workplaces

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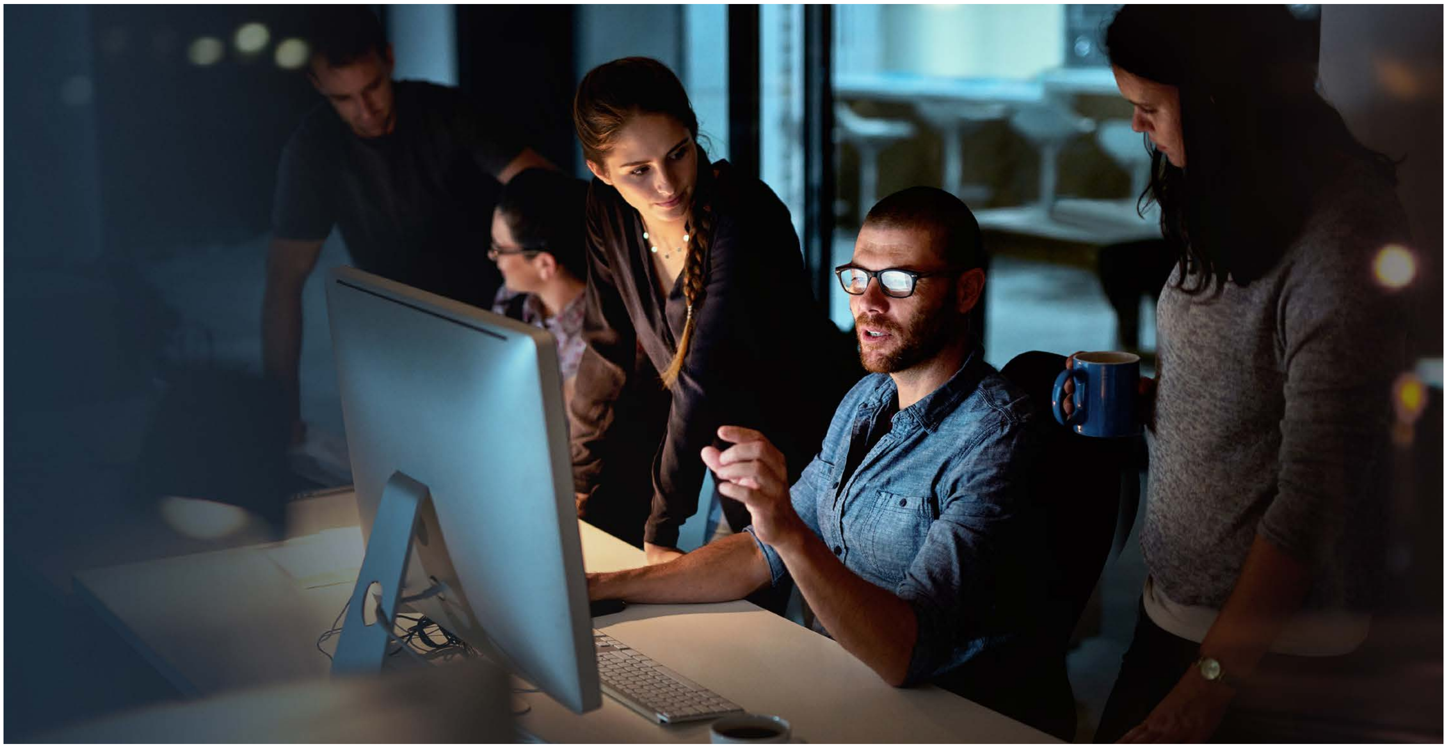

"Let employees know how they can share their opinions, wants and needs."

may try to organize. But he expects that could become more challenging, due in part to changes in leadership and areas of focus at the National Labor Relations Board.

Amid this complex picture, what should nonprofit employers focus on? Consider whether you should make changes to strengthen relationships with your employees. That's an effort that can serve any nonprofit well, regardless of whether you have a union in place or in formation.

Building Strong Employee Relations

Here are some steps all nonprofits can take, regardless of union status, to build strong relationships with their employees. (Specifics on considerations for nonprofit workplaces that have or may form a union follow in subsequent sections.)

- **Create clear paths for employee feedback and ideas.** Let employees know how they can share their opinions, wants and needs. Make sure they know how to ask for guidance or support from their manager. Ask managers to hold frequent one-on-one meetings with team members to provide feedback and periodic all-staff gatherings to share information. Survey employees at least once a year on what's working and what's not.
- **Act on the feedback you receive. When an individual or group of employees raises an issue, respond to it as soon as you can.** If a request isn't doable or will take time, let employees know that.
- **Offer the most competitive pay and benefits you can. Take a comprehensive look at your pay and benefits annually to see if they still reflect the marketplace.** Use our resource "How to Do a Compensation Review for Your Nonprofit" as a guide.
- **Work to ensure employees from all backgrounds feel seen and heard.** Ask your team members what type of supervision works best for them, such as what kind of positive and constructive feedback they prefer and honor all the requests you can.
- **Communicate the rules clearly and often. Revisit your employee handbook to make sure all policies that impact employees are clear.** Communicate key policies and policy changes regularly through multiple channels.
- **Make professional development available to all.** Create an organization-wide professional development

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framework, using our resource "How to Create an Employee Professional Development Plan" as a guide.

What Union Formation Involves

If your workforce is exploring forming a union, or might in the future, what can you expect?

The federal National Labor Relations Act gives most private-sector employees the right to form or join a union and take part in protected activities to improve working conditions. Those activities include protesting low pay, unsafe working conditions, or discrimination. The NLRA typically does not cover supervisors, although some supervisors may be covered if they have been discriminated against for refusing to violate the NLRA.

When employees want to form a union, employers often respond in one of a few ways: voluntarily recognizing the union; maintaining neutrality, which means taking no position for or against the union; or opposing the union and working to discourage its formation.

Voluntary recognition allows employees to have collective bargaining representation based on a showing of majority support, without a formal election. Employers aren't required to voluntarily recognize a union, but in a factsheet for employers, the U.S. Department of Labor notes that "Voluntarily recognizing a union starts the collective bargaining relationship on a positive note. It streamlines the process for beginning negotiations on wages, hours, and other terms and conditions of employment."

Given the nonprofit sector's focus on assisting people in society who need help, said Zonderman, "It would be really good if the nonprofit sector could model more of this nonadversarial organizing and collective bargaining."

If employers do not voluntarily recognize a union, the workplace must hold an election conducted by the National Labor Relations Board.

If a union is certified or recognized through that process, the employer is legally required to bargain with them in good faith about mandatory subjects like wages and hours. The law does not require that the employer and union reach agreement on any issue.

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> “While employers have a variety of options when employees express a desire to form a union, there are some things they legally cannot do. That’s also true for unions.”

After a union petition is filed, the NLRB will investigate whether the union is qualified, if the NLRB has jurisdiction, and if any existing contracts bar the formation of a union. The NLRB seeks agreement between the employer and organizing employees on a date and time for the election. If they reach agreement, the NLRB Regional Director conducts the election. If they don’t reach agreement, the Regional Director holds a hearing and then may order a union election. If a union receives the majority of votes cast in an election, it is certified.

What Employers and Unions Can’t Do

While employers have a variety of options when employees express a desire to form a union, there are some things they legally cannot do. That’s also true for unions.

Under the law, employers may not:

- Threaten to fire employees or cut their salary or benefits if they join or vote for a union or take part in protected organizing activity.
- Threaten to close the organization if employees approve a union.
- Question employees about their union sympathies or activities in ways that interfere with, restrain or coerce employees exercising their bargaining rights.
- Promise benefits to employees if they don’t support a union.
- Transfer, lay off, fire, assign more difficult work tasks, or otherwise punish employees for taking part in organizing activities.

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"If members of your staff team approached you with a unionization request tomorrow, how would you hope to respond?"

- Transfer, lay off, terminate, assign more difficult work tasks, or otherwise punish employees because they filed unfair labor practice charges or took part in an NLRB investigation.

Unions legally are not allowed to:

- Threaten employees with job loss if they don't support the union.
- Seek the suspension, firing or punishment of an employee for not being a union member even if the employee has paid or offered to pay an allowed initiation fee and periodic fees.
- Refuse to process a grievance because an employee criticized union officials or is not a member of the union in states where union security clauses are not permitted.
- Fine employees who validly resigned from the union for engaging in protected organizing activities after their resignation or for crossing an unlawful picket line.
- Engage in picket line misconduct, like threatening, assaulting, or barring non-strikers from the employer's premises.
- Strike over issues unrelated to employment terms and conditions or coercively enmesh neutral people into a labor dispute.

The Unionization Movement is Here. How Will You Respond?

We encourage all nonprofit leaders to spend some time thinking about the possibility of union organizing, regardless of whether they are experiencing a unionization effort. Some questions to ponder:

- What issues surface repeatedly in employee surveys and interviews? Where do you need to invest time now to help prevent a loss of morale and camaraderie?
- How might the unionization movement impact your team and your work, even if your employees never unionize? Will it affect how you relate or collaborate with partners if they unionize? How will employment trends influenced by unionization impact your nonprofit's hiring and retention approach?

Once your team has analyzed these questions and any others you feel are relevant, we encourage you to use the answers for scenario planning. If members of your staff team approached you with a unionization request tomorrow, how would you hope to respond? If your team would prefer to voluntarily recognize a union, what supports would you need to put in place today to ensure you'd be prepared to do that when the time comes? Who would you reach out to if you faced a unionization effort? Do you know of attorneys and advisers who could give you thoughtful counsel?

Contingency planning is one of the best ways nonprofit leaders can prepare their organizations—for anything. The nonprofit unionization movement is changing the sector, and likely will continue to. Spending some time now to better understand it and consider how it might impact your organization—even tangentially—is likely to help you bolster good employee relations. At NRMC, we often tell nonprofit leaders that preparation for any disruptive event tends to prepare you for others, too. Smart contingency planning on nonprofit unionization could advance your understanding of change in the sector—and maybe even influence the way you want to change your community—or our world—for the better.

Rachel Sams is Lead Consultant and Editor at the Nonprofit Risk Management Center. Reach her with thoughts and questions about nonprofit unionization at rachel@nonprofitrisk.org or (505) 456-4045.

How to Maximize the Benefits of Hybrid Work

By Elyzabeth Holford

I was recently at a dinner party where, inevitably, we found ourselves talking about work. One guest raised his frustration with his company's hybrid work policy, saying he feels doubly taxed by the challenges of managing people in person and managing remote workers. "Sometimes it's just too much," he said.

The intricate steps of the return-to-work dance have not been easy to navigate. Managing work in the post pandemic era begs the question of whether to offer a hybrid option and, if you already have one, whether your hybrid option is working. It calls for nonprofit leaders to examine not just our personal style of interacting with others but also every aspect of how our organizations interface with our people. It requires us to evaluate the best modes of communication to match specific situations. It also demands that we develop a level of fluency in video etiquette and sensory patience around unexpected interruptions by technology glitches, partners, children, pets, and more.

Managed poorly, hybrid work can create the risk that you will lose talented people with valued institutional knowledge, managerial talents or prized technical skills. Managed well, hybrid work can allow you to operate with flexibility and effectiveness, two attributes that help nonprofits and teams thrive. Whether you are considering changing work location requirements for your organization for the first time or re-evaluating earlier venue decisions, continue reading for guidelines and practical tips to help you mitigate the risks of hybrid work.

How We Got Here

In the last five years, how and where we do our work has changed dramatically. Before the pandemic, most of us worked physically onsite at our employer's place of business. In the current employment ecosystem, a fully in-person work environment is associated with these benefits:

- Ease of personal and professional connection
- Ease of supervision and coaching
- Opportunity for in-person services

After plenty of early glitches and a steep learning curve, the pandemic drove an exodus for many nonprofit teams to a fully remote work environment, which is often associated with these benefits:

- Improved productivity
- More flexible schedules

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- Stronger work/life balance
- Time/money savings on commuting
- Money saved on office space.

After sheltering in place restrictions eased, employers and employees grappled with the fact that work environments that had become increasingly digital. File rooms, office storage areas and even private workspaces—once commonplace in a modern office—became relics. Nonprofit teams faced uncertainty around whether it was essential to fully return to the physical workplace, as well as how to approach it without pulling the plug on the flexibility that teams came to appreciate during the pandemic.

> "If you are evaluating (or re-evaluating) the decision to be fully in-person, fully remote, or hybrid as a nonprofit team, we recommend that you first pause and reflect."

News outlets have reported extensively on tensions about blanket "return to the office" mandates by large employers like Dell, Amazon, and the U.S. federal government. That's because, in recent years, the concept of hybrid work has evolved from novel to customary. There's even a definitional framework for discussing the different types of hybrid work, which includes:

- Flexible Hybrid: employees choose their hours and place of work each day, driven by the type of work and need for independence and focus
- Fixed Hybrid: specific days for in-office work and other days for remote
- Office First Hybrid: in-office with only a few remote days per month
- Remote First Hybrid: remote with only a few in office days per month that are sometimes labeled as Collaboration days
- Role-based Hybrid: team members schedule their locations depending on their team responsibilities.

Creating/Reviewing Your Hybrid Policy

If you are evaluating (or re-evaluating) the decision to be fully in-person, fully remote, or hybrid as a nonprofit team, we recommend that you first pause and reflect. Remind yourself that you are not alone; virtually every nonprofit leadership team is grappling with how, when, and where they

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should do their work. Ground yourself and your team in what has not changed in your workplace, such as:

- The relevance of your nonprofit's mission
- The need for all staff to juggle many priorities, to collaborate, and to learn on the job
- The importance of strong, trusting relationships in your workplace
- The many challenges related to leading and supporting unique human beings.

Next, take a deep dive into your hybrid policy as employees at your nonprofit understand and experience it. Knowing the expectations of your employees helps shape a more effective policy. Use surveys, one-to-one interviews, or small focus groups to glean a clearer picture of what your employees think about hybrid work, as well as where they agree and disagree on issues.

Use the process to find out what their preferred communication tools and collaboration platforms are, and why.

Next, review performance expectations, metrics, and evaluation processes with a focus on how, when, and where these processes occur in your organizational workflow. Continue your journey and evaluate job roles. Not every role fits perfectly into a hybrid model. Review position duties to see if they align with what your employees do each day. Assess which activities can thrive remotely and which might need a physical office presence. Pay attention to the scope of positions, equipment and workspace responsibilities, and any time-of-day scheduling requirements for specific activities.

As you create or revise your policy, start working on a communication plan about the change. How, when, and where you roll out the new policy is as important as the policy itself. Resolve to be transparent about the process and clear about expectations for policy implementation. Will you consider changes as feedback is processed? Or do you want to test the policy for six months and then review feedback and consider changes? Remember that jobs are not static; the nature of work changes as staff leave and join the team, projects and priorities shift, workflows are re-jiggered, new systems adopted, and so forth. Expect that various things will change in your workplace. Adopt a schedule to revisit your policy in the near future so you can make practical adjustments along the way.

> **"How, when, and where you roll out the new policy is as important as the policy itself."**

Check Your Tech

Nonprofit teams enjoy the double-edged blessing/curse of having many ways to communicate and share information. As your employees move between onsite and offsite work locations, the following steps can help you keep your team connected, your technology fresh, and your data secure:

- Find out which communication tools and collaboration platforms your employees prefer
- Assess your current IT options to discover what modes work well for what types of communication
- Identify any gaps or areas for upgrades to support seamless transitions for your employees between in person and remote work
- Invest in technology that will keep everyone connected and productive

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> **“Whether you’ve managed people in a hybrid environment before or not, it is worth remembering that systems don’t run the organization, people do.”**

- Make sure employees know and follow your protocols for data security and confidentiality wherever they sit

Suggestions for Managing in a Hybrid Environment

Whether you’ve managed people in a hybrid environment before or not, it is worth remembering that systems don’t run the organization, people do. Use the most appropriate methods available to support employees in hybrid environments at every step along their employment journey. This can start at the beginning of the relationship by reviewing your hiring and assessment process. New hires are more likely to be the right fit for your hybrid workplace when you build these materials and activities into your search process:

- Detailed job descriptions that delineate the guidelines for hybrid work schedules
- Structured interviews with discussion of hybrid work policies and practices
- Multiple interview rounds including at least one in person interview, if possible
- Skills assessments including testing of a required job skill while online, if possible.

Onboarding is the next element in building a successful hybrid work environment. You generally have about 44 days for a new employee to decide whether they want to stay with you long term. We recommend that you onboard your new hybrid-based employees in person, if possible. If you can’t, don’t overwhelm an enthusiastic new hire with endless Zoom orientation sessions. Pay attention to meeting cadence and the organization of content within your orientation. Try to match the pace and length of your meetings to the content you are providing.

When addressing technically dense material, schedule smaller chunks of time with intermittent breaks. It often helps to schedule longer sessions for training activities that require hands-on engagement. It is also important to plan several timeslots that are less structured in format to provide an opportunity for a new employee to get to know colleagues and learn more about your nonprofit’s culture and core values.

As you develop longer-term working relationships with hybrid employees, continue to pay attention to the quality and quantity of your time together. For instance, if you operate with an open-door policy when employees are onsite, consider having a “stop by the office” policy when employees are online.

Share your calendar and encourage employees to make impromptu online video conferencing calls when your schedule is open, and do the same with them. For regularly scheduled gatherings, practice holding mindful meetings. We all know how quickly eyes can glaze over, especially in online meetings. Make thoughtful choices about which meetings are online or in person. Routine weekly one-to-ones or team check-ins are often well-suited to online platforms. Deeper dive collaboration

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How to Maximize the Benefits of Hybrid Work
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meetings and brainstorming sessions may be better in person.

In addition to content and location, be aware of employee scheduling restraints. In addition, prepare agendas for your meetings and engage in some realistic planning to make sure that the agendas can be completed. Don't be afraid to switch things up on occasion by gamifying some of the tasks for your online meetings or starting with a thought-provoking quotation.

Finally, wherever your meeting is held and whatever the content of the meeting is, understand that employees are not just relating to you and each other. They are also in a relationship with your nonprofit, and sometimes team members in a hybrid environment can feel a little disconnected from the big picture. A shared commitment to the vision, mission, and values of your nonprofit is very likely the main reason they are there. Knowing and honoring this, it is helpful to hold space in your meetings for discussions about where the organization is headed and how the work of your employees supports that vision and mission.

One of the most important skills for successful managers in any type of workplace is our ability to listen. Active listening means fully concentrating on a speaker, understanding their message, providing feedback, and retaining information. This allows us to effectively grasp the needs, concerns, and perspectives of our team members, fostering better communication and building trust.

Active listening is not just hearing words but also actively engaging with the speaker to avoid misunderstandings and build a stronger relationship. While this is equally important in online and in person settings, in a hybrid work environment, employees are likely to "chat" using Slack, Teams Chat, Chat on ZoomWorkplace or an equivalent feature on other platforms. These chat spaces often operate as a virtual office for your organization;the place where employees spend a significant portion of their working hours. They likely engage with you in the thread of a chat conversation not because of your unavailability for a phone call or in person meeting but rather because they choose to digitally chat instead of a phone call, video conference call, or in person meeting.

Consider developing an active "chat listening" toolkit that runs in parallel to those you use in person and includes:

- focusing on fully reading messages
- taking time to understand the sender's meaning
- asking clarifying questions
- paraphrasing key points to confirm understanding
- using empathetic language, and paying attention to the tone and emotional cues conveyed through emojis and punctuation.

Our advice is similar for video conferencing calls:

1. **Minimize distractions:** Turn off device-based notifications, close unnecessary tabs, and find a quiet space to minimize interruptions.
2. **Maintain eye contact:** Look directly at the camera to simulate in-person eye contact.
3. **Use positive body language:** Sit up straight, nod occasionally, track the speaker, and use facial expressions to convey interest.
4. **Ask clarifying questions:** Respond with thoughtful questions to ensure comprehension and encourage further explanation.
5. **Paraphrase and summarize:** Repeat key points in your own words to confirm understanding and show you're actively listening.
6. **Take notes:** Jot down important details to remember key information from the conversation.
7. **Avoid interrupting:** Let the speaker finish their thoughts before responding.
8. **Stay present and engaged:** Focus solely on the conversation, avoiding multitasking or checking other devices.
9. **Acknowledge feelings:** Validate the speaker's emotions by expressing empathy or understanding.

Regardless of workflow location, the most valuable resource in any nonprofit is its people. Make time and take time to know them. This can be a little more challenging in hybrid work settings, but it is not impossible. In fact, it is essential and it starts with trust. A recent blog post from The Center for Leadership Studies states that "When employees trust their colleagues and leaders, it fosters ethical decision-making, promotes loyalty, and increases the willingness to remain with a company. Trust also plays a vital role in reducing stress levels and hostility in the work environment. Additionally, trust helps overcome resistance to change. Developing and nurturing trust within the workplace is essential for a healthy and productive work environment."

It is no surprise that the top recommendation we can make for managing in a hybrid work environment is to always work to cultivate trust by being a trusting leader. Trust the talented humans who bring your mission to life; you won't regret it.

Elyzabeth Joy Holford is the Assistant Executive Director at NRMC. She enjoys bringing her dog to work in person and online. Reach her with thoughts and questions about hybrid work in nonprofits at elyzabeth@nonprofitrisk.org or 703.777.3504.

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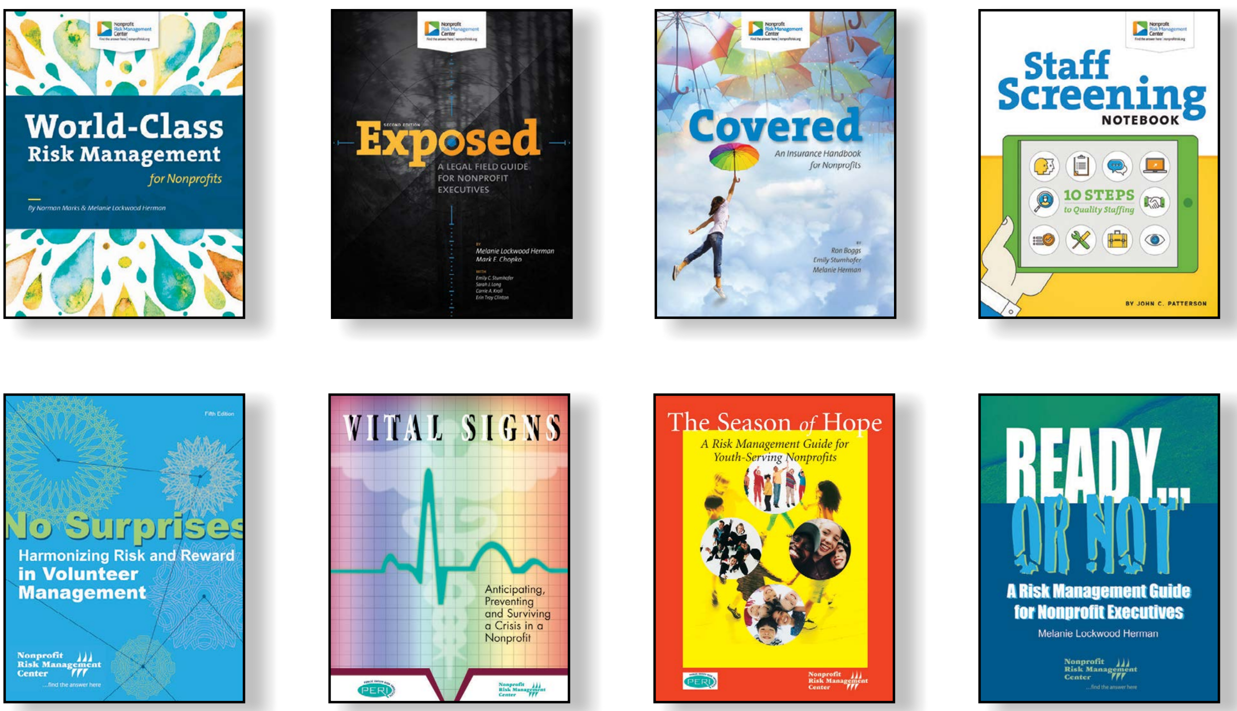

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NEW AFFILIATE MEMBERS

Learn more about NRMC's Affiliate Member program at nonprofitrisk.org/affiliate-membership. NRMC would like to welcome our new Affiliate Members.

American YouthWorks

Arc Wabash County, Inc

Arts Midwest

Building Decarbonization Coalition

Chautauqua Institution

First Tee

Goodwill Industries International

Judevine Center for Autism

Millennium Institute

One Hope United

Pew Charitable Trusts

RF Catalytic Capital

St. Joseph's Indian School

Sunshine Communities

Too Young to Wed

Torrington Library

United Way of Greater St. Louis

Vital Strategies

World Resources Institute