A Culture of Accountability

Why expectations, standards, and common purpose are more important than ever to institutions' success

BY KELLIE WOODHOUSE

When Shaun Keister took the job as vice chancellor for development and alumni relations at the University of California, Davis, in 2011—the first person in the U.S. public institution's history to hold that role—the chancellor told him up front it would be a challenge.

The fundraising veteran would be taking over a disorganized and nascent fundraising operation at a campus where faculty members were skeptical of development efforts and existing donors were frustrated by a lack of communication.

"Much of what she told me was true and perhaps even worse…a lot of the systems were broken," he recalls. "It was pervasive across the enterprise. We had to build out every unit, at every level."

UC Davis was in the midst of an ambitious US$1 billion campaign, but the development office was plagued by data issues and technology problems, and, until then, had never benefited from a significant investment of university resources, Keister says. Donors complained about not receiving thank you notes after making contributions.

Keister quickly identified a critical issue at the heart of the institution's fundraising problems: a crippling lack of accountability. There was no consistent culture of professional responsibility or tangible system to encourage, measure, and reward employee performance.

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>
> **Shaun Keister,** vice chancellor for development and alumni relations at the University of California, Davis

Eight years later, Keister's development shop looks very different. Measures he put in place after his arrival at UC Davis allowed the school to double fundraising in a short time and exceed its $1 billion campaign goal, raising $1.13 billion from some 110,000 donors by 2014. The school is now in the early stages of preparing for an even more ambitious campaign.

"The bottom line for us is that it drives everything we do," Keister says of the collective sense of ownership and purpose that propels his team's work. "In retrospect, setting up a system of accountability was the single biggest factor that allowed us to double our fundraising in a little over four years."

While healthy accountability is at the core of successful advancement enterprises, establishing and nurturing that positive (not necessarily punitive) culture can be arduous.

Leaders must be willing to have difficult conversations and find ways to promote performance metrics that empower employees, avoid micromanagement, and leverage an institution's strategic goals and mission. Team members need to feel like they can rely on their peers and have difficult, even vulnerable, conversations. And individuals must have a clear understanding of expectations and the confidence that all employees are being held to the same standard.

When accountability is working successfully, employees take ownership of their successes and failures, their team's goals, and their institution's mission.

"If you have true accountability, people act like owners who are supporting the mission of the organization in all the ways they interact with constituents," says Suzanne Hilser-Wiles, president of Grenzebach Glier + Associates, a global fundraising consultancy.

When it's absent, things become "murky," says Greg Duyck, a principal of executive search firm WittKieffer's education practice. Staff members don't know how to best spend their time, they lose their sense of professional direction, and they feel disjointed from an institution's mission. The return on investment for their work is low, and their team suffers as a result.

"Uneven or absent accountability is a path to ruin," says Elizabeth Davis, president of Furman University, a private college in Greenville, South Carolina, U.S.

First Step on Road to Accountability: Setting Clear Expectations

When Keister took the helm of the UC Davis advancement office, he charged a committee of staff with developing the unit's first-ever metrics for fundraisers. To encourage buy-in, the committee was chaired by a mid-level fundraiser and included staff from a mix of roles and levels within the organization.
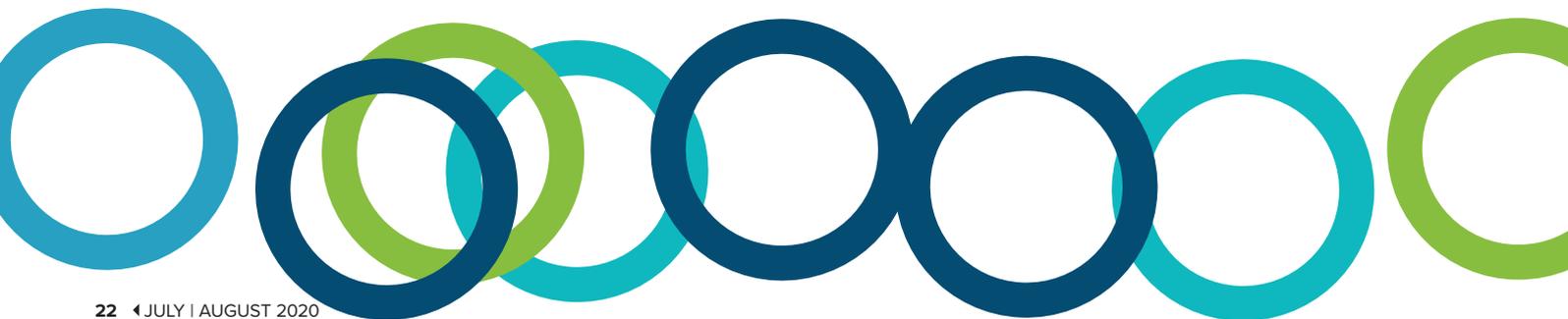
Eight years later, progress toward goals is tracked transparently in an open database. At any given time, staff can look up the performance of fellow development teams and colleagues. In addition to adhering to standardized key performance indicators or KPIs, Keister requires staff to make annual business plans with individual goals for the coming year.

"No one can hide underperformance," Keister says, adding that roughly 85% of annual performance reviews are based on metrics and the completion of stated goals. Meeting goals means staff are eligible for raises and exceeding them for three years in a row is rewarded with a promotion.

"This level of transparency assures staff that no one gets promoted because people like them," he says. "They get promoted because they are getting the job done."

Objectives that are derived from larger, organizational goals and kept front and center—whether on team agendas or staff communiques, for instance—help employees remember what they are ultimately working towards. Managers are also more aware of how their teams are performing in relation to other development teams throughout the institution.

Before becoming a search consultant, Duyck was a senior associate vice president for development at Stony Brook University in New York, U.S., where he helped shepherd the institution through a major fundraising campaign. Reinforcing imagery like being greater than the sum of all parts and praising staff for their individual and collective efforts were key strategies in motivating his development officers and improving their performance.

For example, he sent out weekly emails congratulating staff on successful solicitations and outlining the week's fundraising highlights, successes, and challenges. Colleagues would respond with updates on their own triumphs and tribulations, and Duyck believes the constant communication pushed development officers to finish the campaign strong.

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"We made the whole team's goal real for each individual," he recalls. "They could see what their goal meant for the larger [university] goal and for the team."

But putting clear accountability measures in place isn't always easy.

At first, Keister estimates he lost about one-third of the original development staff, many of whom did not like being evaluated largely by metrics. Since then, Keister and his managers emphasize accountability in interviews so prospective staff members know it's a key part of the culture.

Clear expectations and accompanying KPIs not only improved the team's performance, they also bolstered campus confidence in the development team.

"There was very significant misunderstanding about what fundraisers did," Keister says. "Having these [systems] was very helpful in winning over the campus community into understanding, celebrating, and embracing that philanthropy was a growing part of our culture."

Shared Vision, Purpose Undergirds Personal Accountability

Keister and many of his peers highlight that emphasizing metrics without regard to institutional impact and culture is not a winning strategy. For it to be truly successful, accountability must be infused with an appreciation of an institution's raison d'etre.
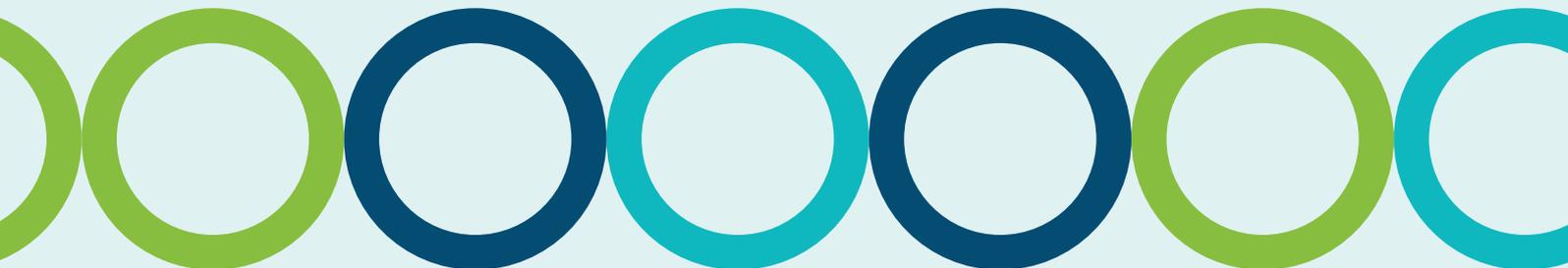
"It's not just the goals. If we can bring employees at all levels into this bigger understanding of what the university is trying to accomplish, it makes the goals meaningful and it makes employees feel like they are contributing to the mission," Davis says. "Being accountable just to numbers and outcomes without really knowing why…is not that meaningful."

Employees generally feel more motivated when they understand the impact of their work, and see themselves as important contributors to the mission of their institution. Yet often this understanding is lacking in the workplace. According to a Gallup survey, just 44% of employees "strongly agree" that they know how their work connects to their organization's goals.

Yet such an understanding is "incredibly vital to helping folks feel like they own their individual goals and own their destiny," says Duyck.

For a culture of accountability to thrive, there has to be continuous dialogue. Often, it's a leader or team's inability to communicate expectations or have difficult conversations that will sink accountability efforts, experts say.

Carrie White, vice president of advancement services at the University of Cincinnati Foundation, feels most at ease with numbers, reporting systems, and metrics. Yet she has come to realize that accountability measures aren't successful without buy-in from employees.

"It's always the people," she says. "As much as I'd like technology and reports to solve all the problems, it's the people. How are you managing relationships amongst your teams and amongst your colleagues in a way that can drive shared success?"

Without a shared vision, things can get chaotic. Instead of everyone sailing in the same direction, there can be infighting and passive-aggressive behavior, people driving their own agendas without group consensus, and political maneuvering.

"It's like a bunch of cats with their tails tied together and everybody is running in different directions, and they all think they are running in the right direction," White says. "You are not driving those shared results, so the organization starts to feel a little bit like high school. …It starts playing out in insidious ways."

Higher education leadership consultant Rob Kramer notes that in an unhealthy organization, managers and staff are often less vulnerable with one another and will paint a falsely rosy picture of their progress, rather than disclosing challenges and seeking advice.

High-performing teams, on the other hand, thrive in a psychologically safe environment, one where they can share their difficulties because the environment is encouraging and helpful.

"There's a much higher level of trust, open communication, and sharing," Kramer explains. "The accountability is there, but it's in a supportive environment and not a punitive environment. People are willing to be much more vulnerable."

Hitting a Roadblock? This May Be Why

A lack of accountability has tangible effects on an organization. Teams are often disorganized, less focused, and unable to reach ambitious goals.

One debilitating result often goes overlooked: While lackluster and mediocre performers can skate by because of unclear or absent expectations, high-performing staff often get frustrated with the team's culture, leading to diminishing job satisfaction and high turnover.

When Hilser-Wiles evaluates a fundraising shop, her team conducts confidential interviews with staff. In places where there is a lack of accountability, one of the first things successful, high-performing development officers will bring up is their frustration with poorly performing employees who aren't held to any clear, visible standard.

"Even if they feel they are recognized, compensated, and rewarded, there is still some residual feeling of unfairness or that the team as a whole would be able to reach even greater heights if everybody was held to a higher standard," she says.

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"Failure of accountability is often failure of communication: communication of expectations, of timelines, of challenges and, of course, corrections when things are not going smoothly," Hilser-Wiles says. "If people understand what is expected of them and how you are going to help them meet that expectation, then you have a mutual accountability that is critical to success."

Hilser-Wiles recently participated in a panel discussion aimed at first-time vice presidents of advancement when the topic of accountability came up. The new leaders instinctively understood the importance of holding individuals to similar standards in order to improve a team's performance and culture, but they wanted advice on how to execute the principle effectively.

News flash: It's not always the fun, rewarding things that make accountability stick.

Although it may be more pleasant to focus time and energy on helping overachievers and top performers grow, dealing with weak performers and providing interventions, guidance, and continuing education is just as important. If these staff members' needs aren't addressed, they can hold the whole team back.

Just as they ask staff to meet metrics and report on successes and failures, leaders should do the same. They should openly take ultimate responsibility for guiding their staff and shepherding the unit, whether performance has been good or bad.

Leaders need to use clear examples, set goals for improvement, and be willing to follow up with the employee regularly, says Hilser-Wiles.

"Some really terrific relationships are forged out of those difficult conversations," she explains. "Be direct but supportive. Authentically tell the person, 'I am invested in your success and here are the things we are going to do together to get you from where you are to where you need to be.'"
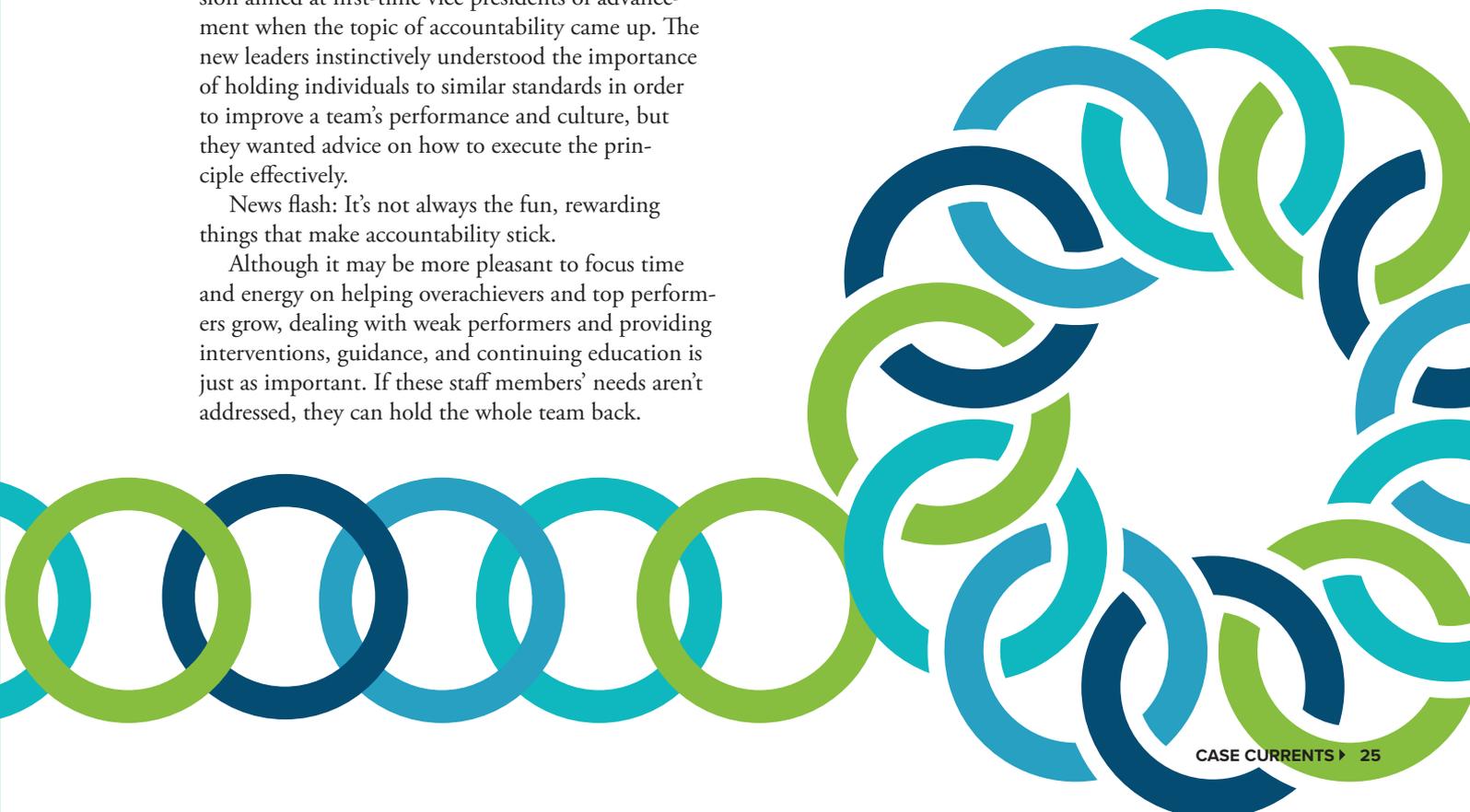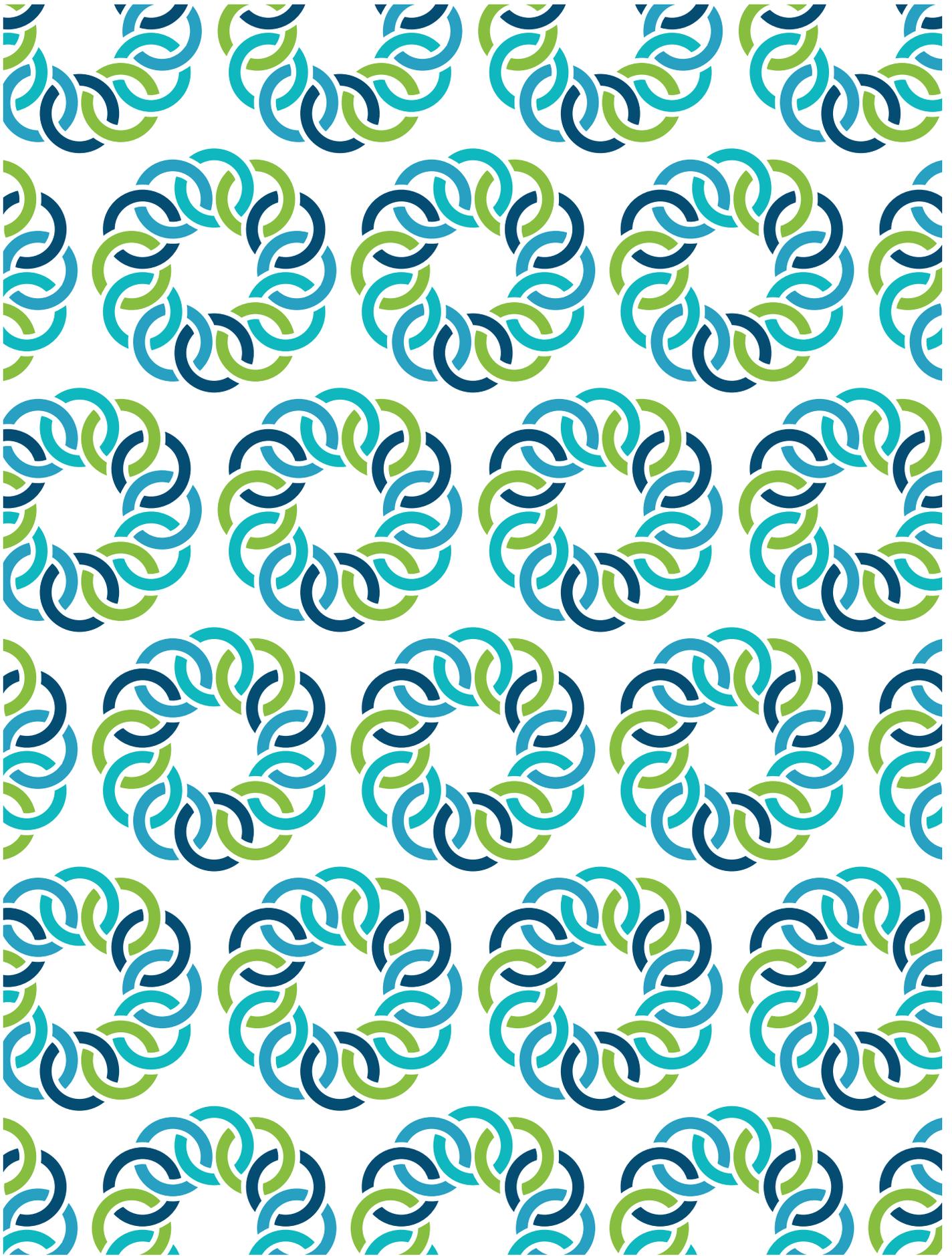
She continues: "It's often a relief to employees. There are very few people who don't know they're struggling."

It's common for new managers, especially those promoted internally, to have trouble with difficult conversations. "They may try hard to be everybody's friend," Kramer says. That's why leadership training for new managers can be critical.

A common misconception with accountability, according to Hilser-Wiles, is that it's a principle best applied downstream—from a boss to her employees. But it's essential that leaders openly hold themselves accountable. Just as they ask staff to meet metrics and report on successes and failures, leaders should do the same. They should openly take ultimate responsibility for guiding their staff and shepherding the unit, whether performance has been good or bad.

Kramer says that when managers complain about having poor-performing teams, the problem is often rooted in a failure in leadership.

"The place my brain often goes is, 'How well is this leader doing the things they need to do to create a healthy work environment? To what extent are the problems a leader is facing the result of things they are doing, or not doing, with their team?'" he says.

Each year, Davis shares her presidential priorities and goals with her senior leadership team and expects those leaders to, in turn, share their goals with their individual units, creating a cascading set of priorities. The process of articulating objectives makes it clear that everyone, even those at the top, has defined goals and is accountable to the institution.

"If you as a manager, director, or leader are not fulfilling the promise that you made to your staff, then how in the world can you hold them accountable to meet your expectations?" Hilser-Wiles asks. "How that is communicated and reported is really critical."

Accountability: More Important Than Ever

The COVID-19 pandemic has forced many institutions to confront whether their workforces are prepared to upend their typical processes, work nimbly, and still successfully meet objectives. Overnight, entire advancement offices were working from home and fundraisers had to learn new ways to meaningfully engage with donors while maintaining social distancing guidelines.

"There are going to be so many management challenges coming out of this pandemic because you are talking about teams that have really had to pivot

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almost overnight the way they do business," Hilser-Wiles says. Getting teams "motivated and feeling accountable," but in a positive, mission-focused, and joyful way, is going to be a challenge, she adds.

The good news is it's much easier to adapt to crises when accountability measures are already part of the workplace culture.

Keister's advancement team at UC Davis, for instance, was well-equipped to adapt to the chaotic, uncertain realities brought to bear by the coronavirus pandemic.

Right off the bat, Keister asked his team members to have meaningful phone conversations with everyone in their portfolio within 30 days. The result was 500 substantive calls within the first three weeks of working from home, a significantly higher number of interactions than would have likely occurred otherwise, Keister says.

"We didn't really have to dramatically alter our metrics," Keister says, adding that the team's high-performing culture was key to a successful transition.

"We started with the metrics here because we had a culture we wanted to change," he says of the visible accountability measures he instilled. "As it took hold and they were embraced and we saw...staff excelling and exceeding, then it became more culture driving [the accountability]." ∎

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