

People or Process: Identifying the True Problem

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Fund development is a relationship business. While there is plenty of data and strategy involved in philanthropy, the critical work revolves around engaging with individuals...with people. When we hit a roadblock, where do we naturally assign the blame? To people.

It's easy to assign the blame to people because humans are complicated with emotions, motives and history, making them easy targets. It is also easier to point a finger at a person than it is to fix a process. I am confident that in the last two years, you have experienced an issue within your team or organization and wondered about *who* caused the problem. Don't worry; you're not alone.

We fault people often, but I would argue that most of the time, we have misdiagnosed a *process problem* for a people problem. In fact, Dr. W. Edwards Deming, renowned engineer and creator of [The Deming System of Profound Knowledge](#), says 94% of the variations in performance level is caused by issues with the system, not the individual.

On the right are some examples differentiating challenges due to people and challenges due to process.

People Problem

- Someone isn't following a process
- Poor attitude
- Lack of commitment
- Malicious intent

Process Problem

- Lack of structure or defined expectations
- Unclear feedback or reporting
- Confusion around decision making

Sure, there are times when bumps in the road are due to challenges with people, personalities and work styles. However, strong philanthropy officers can elevate their leadership by identifying the more frequent breakdown in processes and implementing steps to overcome these barriers. Following through with training on new processes is a must.

Focusing on process instead of people has many advantages, but leaders often do not know where to start. Here are several areas to consider for a process-focused approach:

- 1 **Too many emails.** Do your “reply all” emails go on and on and on within the same subject chain? If yes, something’s not working. Notice I said “something” and not necessarily “someone.” While we often say, “This meeting could have been an email,” that is not always the case. No one wants so many emails they can barely follow the trail.

Call a timeout and assess what is the best process for communicating as a group on the project. Would a short check-in meeting alleviate multiple emails and actually save time? Would one-on-one support help? How about a simple weekly digest email? Not all projects or teams require the same communication methods, but chances are there is a process tweak that can help.

- 2 **Multiple missed deadlines.** While we might think a person is disorganized or disrespectful of others’ time, the reality could be we have put too much responsibility on one person in a short amount of time.

Check in with the team member about a realistic workload and assess what aspects of the project are correctly assigned. Is it too much for one person? Is the deadline too aggressive? Are there others on the team who could share the workload to create a more efficient and effective process with more favorable results?

- 3 **Over- or under-design.** Processes are important, but not in and of themselves. “A system must have an aim. Without an aim, there is no system.”¹

Make sure your processes have a clear purpose and are not overly complicated. There must be goals, objectives, tasks, deadlines and assigned responsibilities.

“ A system must have an aim.
Without an aim, there is no system.”¹



- 4 **Burnout.** Burnout is different than stress. It is beyond stress. Burnout is persistent exhaustion and mental drain of a person or team. Burnout is dangerous. It leads to mistakes, destructive communications, apathy and more.

Work with your team to evaluate projects and processes. What needs to stop? What needs to start? What should be paused and reconsidered? What should absolutely continue? Seek agreement from the team when evaluating how each area affects or impacts the necessary deliverables of the team. Get rid of the fluff. Don't be afraid to make this a recurring team agenda item. You will likely find having conversations about what is working and what needs improvement not only improves processes but also builds trust and resilience among team members.

- 5 **Celebrate appropriately.** Does your organization regularly recognize top performing gift officers who never put their contact reports in the database on time, yet neglects to acknowledge the operations team doing double the work to ensure reports are ready for leadership? Are met objectives and overcome obstacles celebrated as much as end results? Are all effective and efficient team members recognized?

Share your gratitude for a job well done, not just for goals met. Rarely is a goal reached alone. Authentically celebrate all involved.

While philanthropy is a relationship, people-based business, it also relies on dependable processes. Innovative and successful leaders are those who have learned to recognize what challenges are within the processes, not necessarily the people, and work to fix those processes first. This can not only elevate your mission more effectively but can also enhance your executive presence and leadership persona.

About the Author: [Jessica Carswell, CFRE](#), is a Senior Consultant with Accordant. She can be reached at Jessica@AccordantHealth.com or through [LinkedIn](#).

¹ The W. Edwards Deming Institute