

STRATEGIES FOR IMPACT WITHOUT BURNOUT

THE
HAPPY,
HEALTHY
NONPROFIT



BETH KANTER ALIZA SHERMAN

WILEY

Praise for *The Happy, Healthy Nonprofit*

"The Happy, Healthy Nonprofit is an essential guide for leaders and organizations looking to make a positive social impact on their communities and all around the world. Beth Kanter and Aliza Sherman lay out a clear and compelling case for building sustainable lives while changing the world."

—Arianna Huffington, *Huffington Post*

"Many social good activists who leverage the power of spreading good through small acts are passionate about whatever they are trying to change in the world. That passion, however, is a double-edged sword: it propels them forward, but often comes at the expense of their health and happiness. Kanter/Sherman's book shows how these passionate individuals can incorporate self-care and well-being into their lives in order to sustain that work. A must-read."

—Jennifer Aaker, General Atlantic Professor of Marketing at Stanford University's Graduate School of Business.

"I'm entering my second decade as an executive coach and an instructor at the Stanford Graduate School of Business. *The Happy, Healthy Nonprofit* covers many of the same topics that I discuss with business leaders and MBA students and write about for the *Harvard Business Review*. Beth and her coauthor Aliza Sherman have created an essential resource for every nonprofit professional."

—Ed Batista, Executive Coach and Instructor, Stanford Graduate School of Business

"For too long, we have lamented the heroic leadership and martyrdom prevalent in nonprofits without actually proposing an alternate way of operationalizing a commitment to staff well-being. Beth Kanter and Aliza Sherman finally take this on. Starting from their personal stories of recommitting to their own well-being and then drawing in the expertise of others, they offer practical strategies for prioritizing wellness. Organizations can no longer ignore this mandate!"

—Jeanne Bell, CompassPoint

"As an advocate for thriving in one's work and life, I recommend *The Happy, Healthy Nonprofit* as an essential guide for social change leaders and organizations looking to make a positive impact on their communities and world. Beth Kanter and Aliza Sherman lay out a clear and compelling case not just for self-care for individuals but also a 'WE-care' culture shift for organizations to create happier, healthier workplaces."

—Heather L. Carpenter, Coauthor of *The Talent Development Platform: Putting People First in Social Change Organizations*

"Doing work that matters is rarely easy. Aliza and Beth have written a book that doesn't shy away from this. It is truthful, honest, and fun while motivating you not to give up and to keep doing your important work. It doesn't matter if you run the largest foundation in the world or are volunteering on weekends. This book will inspire you to take better care of yourself so you can do your work in a more healthy and sustainable way."

—C.C. Chapman, Author of *Amazing Things Will Happen: A Real-World Guide on Achieving Success and Happiness*

"Many dream of a life of service and then are surprised at the strain this work can cause both emotionally and physically. While we know intellectually that we cannot fully give ourselves to others if we do not take care of ourselves, our passion for our work, the heavy

emotional investment it requires, and our organizations' limited resources can combine to take a personal toll. In *The Happy, Healthy Nonprofit*, Beth Kanter and Aliza Sherman shine a light on this challenge, giving us practical tools for self-care and for creating the kind of organizational health that's needed if we and our co-workers are going to have the endurance, the perseverance, and the joy required to make lasting change."

—Sasha Dichter, Chief Innovation Officer, Acumen

"As a nonprofit leader for decades, I know how easy it is to give so much to your cause that you deplete yourself. In *The Happy, Healthy Nonprofit*, Beth Kanter and Aliza Sherman provide an essential guide to elevate self-care as a strategic tool for nonprofit professionals who want to perform at their best as they work to change the world."

—Gloria Feldt, Cofounder and President, Take The Lead, and
author of *No Excuses: 9 Ways Women Can Change How We
Think About Power*

"*The Happy, Healthy Nonprofit* reframes 'work' not as the drudgery that leaves most of us broken and burned out, but as a vehicle for meaning, well-being, and happiness. It is a smart guide that offers practical and important strategies for integrating self-care into the fabric of organizations. *The Happy, Healthy Nonprofit* is a must-read for every person in every nonprofit organization from the board room to the C-suite to the staff and the interns. Read it. Mark it up. Turn down the pages. Share it. Do it."

—Allison Fine, Author, *Matteredness: Fearless Leadership
for a Social World*

"The 'put on your own oxygen mask first before helping others' message from the airlines could not be more relevant to the nonprofit sector and brought to life by this book. This is an essential read for the extraordinary nonprofit and social change leaders around the world working tirelessly to serve our communities. Thanks to Beth and Aliza—both for writing this and leading by example in their own professional lives."

—Meg Garlinghouse, Head of LinkedIn for Good

"A much needed guide for nonprofits to meet their employees and volunteers where they are, and a handy tool for anyone looking to sustain a demanding mission-focused career. Beth Kanter and Aliza Sherman serve as our self-care docents, and their book feels as much like a hug as a template for nonprofit workers who yearn for permission to take care of themselves while still being dedicated to their mission."

—Wendy Harman, White House Presidential Innovation Fellow

"We NGO types are a pretty righteous bunch. I mean, I spend my time working to end all sorts of global ills that have plagued the earth since the dawn of time—poverty, hunger, horrible diseases. And the thinking goes 'because they suffer, I must too.' When someone leaves the office early, the running joke (with a bite) is 'you are letting poverty win!' Beth and Aliza are offering a guidebook to save us from ourselves."

—Tom Hart, Executive Director, North America, the ONE Campaign

"There is no problem more pressing in the social sector than the burning out of the best and brightest talent in our field—we cannot be of service to our communities if we have driven ourselves into the ground. What a blessing to have great minds like Beth Kanter and Aliza Sherman on the case to encourage us all to help ourselves, our organizations, and our future."

—Clayton Lord, Vice President of Local Arts Advancement,
Americans for the Arts

“You’re no good to the cause if you’re not being good to yourself. *The Happy, Healthy Nonprofit* is a much needed guide to help get the most out of the human element in an organization.”

—Steven R. MacLaughlin, Director of Analytics, Blackbaud, Inc.

“The only asset we have for making a contribution to the world is ourselves. Yet so many well-intended social entrepreneurs forget this and burn out. Good motives are not enough: we need the kind of practical wisdom on offer in every page of this book from Beth and Aliza!”

—Greg McKeown, New York Times Bestselling Author of *Essentialism: The Disciplined Pursuit of Less*.

“It’s common for passionate social change leaders to throw themselves into their work, while neglecting to take care of themselves: we all know people and organizations that have burned out from these bad habits. But if we want to create sustained social impact at scale—and high-performing nonprofits—then we need to focus more on personal and organizational sustainability. And as Gandhi so wisely counseled, we must be the change we want to see in the world. Luckily Kanter and Sherman give us invaluable advice on how to redefine our approach toward work, create healthy organizational cultures, and pursue our passions with purpose and joy.”

—Heather McLeod Grant, Coauthor of the best-selling *Forces for Good*, and social impact adviser

Pacing oneself for marathon weeks versus sprint days is a vital lesson for nonprofit leaders to learn. *The Happy, Healthy Nonprofit: Strategies for Impact Without Burnout* should be read by all nonprofit leaders who thrive on adrenalin but who know they need more than just the coffee buzz to lead an effective organization. Beth Kanter and Aliza Sherman provide common sense information in an actionable way. The time is now to make this personal commitment to ourselves, each other, and the communities we serve.

—Kim Meredith, Executive Director, Stanford Center on Philanthropy and Civil Society, Stanford Social Innovation Review

“No one works harder than a nonprofit professional—funder driven stress, lack of resources, and work/life balance are challenges constantly faced by those working to make the world a better place. *The Happy, Healthy Nonprofit* is a must-read for leaders of organisations both great and small, who want to transform, support, and grow their social good missions.”

—Carlos Miranda, Founder of I.G. Advisors and Social Misfits Media

“At a time when the lines between ‘work’ and ‘life’ are becoming more blurry, emerging leaders are seeking new ways to lead a fulfilling social good career. Beth Kanter and Aliza Sherman have created a must-have guide that champions self-care for individuals and organizations so they can thrive while doing good in the world. This book gives critical advice on building a happier, healthier nonprofit culture that will attract and retain young talent in the sector, addressing many of the challenges young nonprofit professionals face in the workplace.”

—Amber Cruz Mohring, Co-Executive Director, YNPN

“Great nonprofits create a culture of well-being in their workplaces that encourages self-care because they know that their people are mission critical. Beth Kanter and Aliza Sherman have created a must-have guide that champions self-care for individuals and organizations in the nonprofit sector.”

—Perla Ni, Great Nonprofits

“Beth Kanter and Aliza Sherman compellingly address the challenges and opportunities of the millennial generation by shining a light on the importance of self-care. *The Happy,*

Healthy Nonprofit can, should, and will start an important well-being movement in the nonprofit sector to become a better workplace for all! It is a must-read for anyone who sees themselves as a leader in the sector!”

—Yaniv Rivlin, Senior Program Officer, Charles and Lynn Schusterman Family Foundation

“In *The Happy, Healthy Nonprofit*, Beth and Aliza teach us that employee wellness and organizational performance are not only directly correlated but causal. Investing time and prioritizing effort in keeping the most valuable asset a nonprofit organization has—its people—both happy and healthy is an effective strategy to keeping the organization high-performing.”

—Ettore Rossetti, Sr. Director, Social Business Strategy & Innovation,
Save the Children; 2015 AMA Nonprofit Marketer of the Year;
Two-time Guinness World Records® Title Holder

“As social entrepreneurs we can’t make an impact in changing other people’s lives unless we attend to our well-being. *The Happy, Healthy Nonprofit* is an essential guide for social change leaders and organizations who need to take care of themselves while seeking to make a positive change in the world.”

—Premal Shah, President and Co-Founder, Kiva.Org

“By encouraging us to extend our heartfelt values, often directed only at our missions, to the people and teams that drive them, there is no doubt in my mind that *The Happy, Healthy Nonprofit* is an essential tool and a must-read for all those involved in the social impact sector dedicated to a life of meaning and purpose to create a better world.”

—Kyla Shawyer, CEO, The Resource Alliance

“Regular followers of social media mavens Beth Kanter and Aliza Sherman will marvel at the way they balance intense and productive careers with caring and creative home lives. Now the rest of us can learn the secrets of how they found balance in their personal and professional lives in their new book, *The Happy, Healthy Nonprofit*.”

—Vincent Stehle, Executive Director, Media Impact Funders

“Beth Kanter and Aliza Sherman have committed personally and professionally to the success of the nonprofit sector and the social change leaders who work tirelessly to do good in the world. Their guide to caring for ourselves, our people, and our organizations is indispensable for anyone looking to achieve success and make an impact over the long term.”

—Henry Timms, Executive Director, 92nd Street Y

“*The Happy, Healthy Nonprofit* is essential reading for everyone in the social sector. First and foremost, it provides a clear path to survival for those at the front lines of social change who experience the stress and strain of our passionate, but under-resourced sector on a daily basis. But in the long term, the book is a wake-up call for every leader, board member, and funder who doesn’t understand the risk we have of losing incredible talent and the real price of burn out. Beth and Aliza have achieved a masterful feat—providing practical guidance and a call to action—all in one book!”

—Victoria Vrana, Senior Program Officer, Philanthropic Partnerships Team, Bill & Melinda Gates Foundation

“Admit it: you do this work because you care about others and making the world a better place. But somewhere along the way you forgot how to care for yourself and your colleagues. Worry not. Beth Kanter and Aliza Sherman get it and are here to help you and your organization to embrace not just self-care but WE-care.”

—Suzanne Elise Walsh, Deputy Director, Postsecondary Success, Bill & Melinda Gates Foundation

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From Beth:

In memory of my dad, Dr. Earl Kanter.

To my family, Walter, Harry, and Sara.

From Aliza:

In memory of my dad, Retired Cdr. Myron B. Sherman.

To Greg, Noa Grace, and Josiah. Family.

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And our heartfelt thanks to the many amazing nonprofit professionals and experts who gave their time and shared their stories with us about burnout, self-care, and organizational culture.

This book is for everyone who is doing the hard work to make our world a better place.

BETH'S ACKNOWLEDGMENTS

I couldn't have worked on this book without the love and support from my family when I was at the computer writing or when I needed to take long walks to think about the book or for self-care. And I couldn't have written this book without Aliza Sherman who made working on the book project an exciting journey of curiosity, creativity, learning, and fun and shares my passion for magic markers and drawing. I know that with Aliza

as a writing partner, I've become a better writer. But, more important, she helped break my 35-year habit of adding two spaces after periods!

ALIZA'S ACKNOWLEDGMENTS

I couldn't have worked on this book without patience and understanding from my family when my nose was stuck to my computer screen and my brain was in this book. And I couldn't have written this book without Beth Kanter who I've known for years and got to know even better in the past 12 months. Here's hoping her generosity of spirit, brilliance of mind, and dedication to walking has rubbed off on me. Here's to Oxford commas and finding our way out of rabbit holes!

Foreword



Okay, one more triple bacon-infused tequila. But I'm adding a kale garnish.
Self-care!

When I got the e-mail from Beth and Aliza asking me to write this foreword, I nearly spit up a mouthful of tequila all over my keyboard. Stop judging; it had been a rough week, and that was my self-care tequila. I keep it under my desk, along with several bars of dark chocolate, and pull it out after getting grant rejections, receiving unfair criticisms from my board, or any time the phrase “annual gala” comes up at any meeting.

Honestly, asking me to write the foreword to a book on self-care is like asking my toddler to write the intro to *The Joys of Sharing Your Toys*

or *No More Tantrums: Effective Communication with Your Parents*. Having been an executive director for over a decade, I have picked up some horrible habits, such as eating lunch at my desk while reading e-mails, staying up late working every night, and saying yes to every request of my time. I developed this one weird twitch in my left eye and started scaring staff and volunteers. The concept of self-care came along, and I scoffed, deciding that I would rather juggle mason jars full of live scorpions than do yoga or chug a green smoothie every morning, or bathe every day, or whatever this hippie philosophy entails.

But reading this book, the book in your hands, made me realize self-care is way more than the downward-facing dog and kale smoothies. Beth and Aliza, with their signature humor, piercing insight, and concrete advice, present a compelling argument for why we burn out and why it is important for all of us to take care of ourselves and each other and create happy, healthy, supportive environments in which to do our work.

A while ago, in a period of overwhelming stress, I wrote the Nonprofit Unicorn's Mantra:

I am a nonprofit unicorn. I try each day to make the world better. I am good at some stuff, and I suck at some stuff, and that's okay. There's way more crap than I can possibly do on any given day. On some days I am more productive than on other days, and that's okay. I know sometimes there are things that I certainly could have done better. I know that I can't make everyone happy or spend as much time as I could on everyone. I know there's a bunch of crap I don't know. Sometimes I make mistakes, and that's okay. I will try my best to learn and to improve, but I'll also give myself a break. I will be as thoughtful and understanding with myself as I am with my coworkers and community members. I am an awesome and sexy nonprofit unicorn.

That mantra has carried me through some tough days as a nonprofit professional doing work I love. Beth and Aliza, though, made me realize self-care is not just about individuals but also about organizational culture and combatting sector-level philosophies such as scarcity and martyrdom, about changing unrealistic expectations and restrictions from funders and from society. The shift from self-care to WE-care, as discussed in this

book, is a critical shift our sector must make if we want to effectively address the injustice and inequity facing our community every day.

It comes down to this: our work matters, but it is ongoing and we must sustain ourselves for the long run. Self-care is no longer just about us as individuals. Unlike many other professions that will likely be taken over by robots, human nonprofit professionals will always be needed due to the complexity of our work. We lift up families; we build communities. If we burn out, the cost to our world is high.

Thank you for all that you do. If you are reading this book, you are probably a nonprofit professional contributing to making the world a better, safer, happier place for me and my tantrum-throwing toddler. I am very grateful. I know our field is not easy, and, in fact, it can be maddening. But our work is vital, and it cannot be done without the amazing professionals dedicating untold hours every day to it. Please take care of yourself as you take care of others, and let's make every nonprofit a happy and healthy place, where our eyes don't twitch and where we can take swigs of Jose Cuervo simply for its exquisite flavor.

Vu Le

Nonprofitwithballs.com

Introduction

THE VISION

Cue up the Pharrell Williams song, “Happy.”

It might seem crazy what we’re about to say, but work-life balance is good when you can take a break. Clap along if you want to know what happy and healthy is to you. Clap along if you feel “happy and healthy nonprofits achieve results” is the truth.

Let’s face it: your health and happiness directly affect how you feel at work and affect your productivity. Attending to your well-being can be the antidote to stress and prevention of burnout, and those are great reasons to start practicing self-care. According to the World Health Organization, self-care is “what people do for themselves to establish and maintain health, and to prevent and deal with illness.”¹

Working for a nonprofit that has limited resources can be a pressure cooker, but what if your organization’s culture encouraged you, and everyone who worked there, to embrace self-care without guilt? What if you could feel the vibrancy of your organization when you stepped into the physical office or hear it in the voices of staff when they talked about what it is like to work at your organization? What if every time your organization advertised a position, you were flooded with exceptional applicants because of your nonprofit’s reputation for a culture of well-being with policies and benefits to support it? Imagine the increase in results your organization would experience because of high talent retention rates instead of high turnover, eliminating cracks in your institutional memory.

What if this was *your* organization?

We’ve just described the *Happy, Healthy Nonprofit*. This book provides you and your organization with a road map to getting there—from creating a self-care plan for yourself to weaving well-being into the DNA of your nonprofit by developing and implementing a happy, healthy strategy.

In this book, we define “wellness” as traditional physical and mental health versus “well-being,” a state of being comfortable, happy, and healthy that contributes to wellness. Workplace well-being goes beyond the typical

lip service toward self-care such as distributing brochures about burnout or bringing in an occasional speaker to an all-staff meeting to talk about stress relief or nutrition. Offering the occasional massage on-site or giving staff a few paid hours off as a “reward” isn’t a sustainable happy, healthy strategy.

When self-care initiatives are treated as extras instead of being built right into the fabric of your organization’s processes and policies for worker well-being, they are nothing more than a Band-Aid, barely disguising the underlying chronic stress and dysfunction eroding your organization’s ability to meet its mission. This book is about creating harmony between the individual practice of self-care and an organization’s culture. Authentic self-care is a learned habit for individuals, and it needs to be embedded into organizational culture to prevent staff members from pitting their own needs against the organization’s mission.

Treating self-care and well-being as an organizational *strategy* helps create a happy, healthy nonprofit, and that is what we advocate in this book. Your efforts toward self-care should be supported by your organization—something we call “WE-care.” WE-care does the following:

- ☛ Recognizes self-care as an inextricable part of work.
- ☛ Acknowledges an organizational responsibility for self-care.
- ☛ Builds healthy work-life boundaries into workdays and workweeks.
- ☛ Ties passion for personal well-being to passion for organizational mission.
- ☛ Goes beyond a focus on physical health.
- ☛ Helps the nonprofit become a high-performance organization and sustain results.

As part of writing this book, we interviewed scores of nonprofit leaders, staff, and board members. What we discovered is nonprofits that practice happy, healthy ways of working are also high-performance organizations. What does that mean? According to “The Performance Imperative: A Framework for Social-Sector Excellence,” from the Leap of Reason Ambassadors Community, high performance is the ability to deliver—over a prolonged period of time—meaningful, measurable, and financially sustainable results for the people or causes an organization is in existence to serve.

Says Mario Morino, chairman of the Morino Institute and cofounder of Venture Philanthropy Partners, “The Performance Imperative is a North Star guiding board, management, and staff on a journey of

continuous learning and improvement. As part of the journey, a happy, healthy organization nurtures a culture that encourages curiosity, reflection, and an environment where it's safe to acknowledge challenges. Individuals in the organization are fulfilled when they see they are making a material, lasting difference for the people or causes they serve."

In an interview, Nancy Lublin, CEO of Crisis Text Line, told us "burnout is bullshit." We were taken aback. Certainly staff at a nonprofit such as Crisis Text Line, which provides counseling and intervention to people in crisis, might experience high levels of stress and burnout. But Lublin, who also founded Dress for Success and Do Something, believes that burnout equals being "out of love" with one's job, and if that's the case, she says, either that person should get another job or be asked to leave.

Lublin's zero tolerance for bad attitudes and for people who don't take care of themselves means she is willing to let people go if they aren't happy at their jobs. As a nonprofit leader, Lublin fosters an organizational culture that encourages staff to leave the office on time and have a life outside of work, builds fun into work and the workplace, and supports written and unwritten rules that prioritize self-care. Not surprisingly, Crisis Text Line is a high-performance organization.

Happy, healthy nonprofits engage their external stakeholders and deploy their skills internally to involve staff in the design and stewarding of well-being workplace initiatives. Happy, healthy nonprofits cultivate a culture of kindness, compassion, and respect as a cultural norm for how staff members work together. Author Allison Fine defines this behavior as nonprofits "working *with* rather than *at* people to create a powerful force of mutual interest," something she calls "mattering," which is also the title of her recent book on the topic.²

Imagine what it would be like if all nonprofits nurtured their staffs' well-being with the same care and attention they give to external stakeholders. What if nonprofits looked internally to their staffs to get feedback and used it to continuously improve their workplace environments, cultures, and work flows? What if staff felt part of a supportive community at the office with everyone working toward the greater good, tapping into a never-ending supply of creativity and energy? If all nonprofits were happy, healthy nonprofits, think how much more effective we would be in solving some of the big social change problems of today's world.