



PANO



**Standards for
Excellence**
Replication Partner

Values to Action Roadmap



Purpose

This roadmap is for nonprofit leaders, volunteers, staff, funders, and donors who commit to bold action in shoring up, protecting, and promoting the foundational purpose of the nonprofit sector in this moment of uncertainty. We see the sector as a civic space where people envision solutions and take action to solve community problems.

The wisdom offered here comes directly from nonprofit leaders and is based on a three-year community-listening project in Pennsylvania, but it offers a familiar refrain: we need to reimagine nonprofit best practices.

Rather than simply relying on a checklist of **WHAT** policies and practices to adopt, this toolkit will help you tackle two additional, and very important questions: **HOW** do we work and **WHO** is our work for?

This Values to Action Roadmap can help you better assess your nonprofit's capacity beyond traditional best practice to center values, fulfill civic responsibilities, share power, and enact policies that are people-centered, right-sized, and relevant.

If you're ready to move beyond traditional capacity building toward community building, this toolkit is for you.

We've included resources that can help you stay safer in the current environment as sector norms erode, and resources to help you **build something better** that can be a light to help point the way for our struggling communities. There is potential within this moment to reimagine our sector.



A Reimagined Nonprofit Sector

What we heard from nonprofit leaders across Pennsylvania reveals both a need and a possibility: a reimagined sector shaped by lived experience, shared accountability, and values-driven practice.



Best practices often reflect the assumptions of dominant institutions, reinforcing models that privilege compliance over care, efficiency over equity, and donor comfort over community voice. These gaps don't only fail under-resourced organizations that are closest to the work, they also prevent well-funded nonprofits from realizing their full potential as agents of community-centered change.

PANO, together with our members, imagines instead a sector where excellence is measured not only by adherence to inherited rules, but by how well we cultivate belonging, repair harm, and deliver on our missions with integrity. A sector where structure supports culture, culture sustains people, and people shape the path forward. A sector where guidance is grounded in real conditions, and where relationships are treated as infrastructure, not afterthought.

This is the vision participants offered and to which PANO is committing: not a singular model, but an ecosystem of nonprofits that are bold, rooted, and responsive. A sector where authenticity is not at odds with legitimacy, and where values-aligned practice is the standard, not the exception.

The future we are working toward goes beyond technical updates. It calls for a shift in power and purpose—a new contract between the sector and the communities it serves. That is the invitation at the heart of this report: to shape a nonprofit sector that lives up to its promise. A sector where every organization has what it needs to act with courage, care, and collective accountability.





Areas for Reflection

This reflection guide can help you get inspired, identify potential actions, and introduce you to some of the best resources and tools to super-charge your focus on democracy-supporting activities like community engagement, advocacy, workplace culture, and shared decision-making.

Use this reflection guide to build deeper thinking with colleagues to assess your structure, culture, leadership, policies, and practices, then use the worksheets to plan how to build your capacity to meet the moment, and dive into the resources that will help point the way.

The guide is divided into five sections to help you assess and improve your practice related to building community.

Are you ready?



Values to Action Roadmap

Start your journey: This Values to Action Roadmap can help you assess your nonprofit's capacity beyond traditional best practices to center values, fulfill civic responsibilities, share power, and enact people-centered, right-sized, and relevant policies.



Values, Voice, and Belonging

Model transparency and care as core components of strong leadership.



Power With, Not Power Over

Share leadership and decision-making broadly, equipping individuals for participation.



Nonprofits as Civic Actors

Amplify public voice and nurture safe public spaces as a key function of nonprofit work.



People-Centered Policy and Practice

Treat internal policy development as a collective exercise in learning and trust-building.



Right-Sizing and Relevance

Nonprofits come in all types, sizes, and missions. Ensure your policies are right-sized and relevant, and build excellence from where you are.

Accountability & Excellence



Are you a funder or donor?
We've got a special section and resources for you to help you shift your thinking as it relates to funding requirements.



How to Use this Toolkit

Do I need to go in order?

Nope! Tackle the area that feels most important or urgent for your organization right now. Identify a specific challenge you'd like to address. Skip around. Find the linkages. Pull the threads. Come back to this over time to check in and identify new opportunities to deepen your practice.



Where Should You Start?

Some of us are still learning about the importance of authentic community engagement, workplace culture, belonging, interrupting power dynamics, and shared decision-making. Some of us have the skills and the knowledge, but not the tools or resources. No matter where you're starting, this roadmap offers a jump off point.





Recalibrating Leadership Stances

Personal Learning: Use these additional resources to explore terminology, concepts, and frameworks; and advance your own learning.



Assessing Your Organization

Self-Reflection and Group Processes: Use these journal prompts for self-reflection. We recommend taking on only one at a time! You may also want to share these reflection prompts with others in your organization to spark new insights and thinking. Leaders and organizations that are ready to dive in can use the facilitated group questions in the worksheets (and some of the tools and methods provided in each section) to guide those conversations.



Growing Your Skillset to Engage in this Work

Trusted Partners to Support Building Competencies: Many of these ideas, tools, and methods won't come naturally to us and we may need a bit of support to learn the approach and adopt the practice. Here, we share some of our trusted partners you can turn to.




Tools and Methods to Expand your Practice

Leaning on Collective Wisdom: Do you have the knowledge and skills, but need the tools to act? There are methods and tools out there to support this work in your organization and in your community. We share some of our favorites here to help improve your practice of shared decision-making and organizing for change.

***If you have resources that you've used or developed that are 1) free and 2) not restricted to membership, reach out as we [continue to grow this library](#).*





Centering What Matters Most: Values, Voice, and Belonging



“As a leader, you are responsible for stewarding a culture of connection in your own sphere of influence. It is your own way of being, as much as the strategies you implement and the supports you put in place, that creates the conditions for others to feel invited into cultivating connections themselves.”

*- A Call to Connection: Rediscovering the Transformative Power of Relationships,
The Einhorn Collaborative*





Across every best practice category, from governance to fundraising, we must reorient nonprofit norms toward values, voice, and belonging. This is more than adding a few more equity checkboxes. It is a deeper invitation to reconnect the sector's policies and practices to its purpose. When values are unspoken, they default to dominant norms. When voice is tokenized, participation shallows. And when belonging is not actively cultivated and built into organizational structures, exclusion becomes structural.



Implication: Without explicit alignment to community-centered values, policies risk reinforcing harm—even when technically compliant.



Opportunity: Ensure every facet of nonprofit practice reflects organizational values in concrete ways. Revise policy templates in our resources and materials to reflect relational accountability, plain language, and culturally responsive decision-making. Model transparency and care for all staff members, board members, volunteers, and the people served by the nonprofit as a core component of strong leadership and governance.

Working in the nonprofit sector can be challenging, but so many of us do this work because of our deeply-held personal and organizational values. Too often, though, our organizations' actual day-to-day practices struggle to live up to these values, and we find ourselves fighting to change internal systems instead of "the system" we signed up to change. Poor values alignment shows up as hallway conversations, small rebellions, low morale, and poor performance. At worst, it can show up in outright conflicts and coups, severely impacting the work of the organization.

Shared values bring us to this work, and they can keep us in this work. If you're experiencing challenges opening up conversations about values alignment and organizational practice, or struggling to set boundaries for action or inaction related to these values, explore these prompts, worksheets, and resources to help work through these challenges and move to action.



Recalibrating Leadership Stances: Personal Learning



What is belonging? (The Othering and Belonging Institute)

This framework provides powerful concepts, context, narrative, and tools to support belonging efforts at all kinds of organizations and for all kinds of communities. It includes facilitation guides like A Resource Guide for Belonging-Builders that defines key terminology like belonging, targeted universalism, and bridging and suggests design principles for creating spaces where belonging is real.



What is Disability Justice? (Disability & Philanthropy Forum)

The disability justice movement has mothered and nurtured so many wise and creative approaches. In this resource, you'll learn about the origin and definition of disability justice as a movement and framework. It also links to a disability justice curriculum and audit tool you can use to assess your practice.



How to Integrate Community Voice in Your Needs Assessment (Common Good Data)

For those who prefer to listen instead of reading, this podcast kicks off a series on community needs assessment and the strategies, tools, and resources you need to bring community voice to the forefront.



Empowering Employee Voice: Tools and Strategies for Workplace Engagement (Points of Light)

To help navigate the timely issue of employee activism, Points of Light has created a checklist of considerations to guide internal conversations around empowering employee voice.



Assessing Your Organization: Self-Reflection and Group Processes

Organizational Values

- What values does the organization hold that feel mismatched with day-to-day practice? What values are more aspirational than practical right now?
- How are leaders in our organization devoting resources to creating a culture of belonging? What ideas do you have for creating a workplace where people genuinely like the people with whom they work?
- In the current environment, have organizational leaders been clear about the organization's values and the boundaries of its compliance or pushback on the government's attempt to control those values?
- If we're not living up to our values, what's the risk of not taking action?



Exploring a Core Value: Inclusion and Belonging

- Do the leaders and others at our organization see, value, and empower individuals, and celebrate and recognize each individual's humanity? What does that look like in practice?
- What opportunities might we have to embed our values more fully and increase the sense of belonging for those we interact with?
- Thinking about your internal organizational practice, what actions have you taken to make your day-to-day work environment more inclusive and accessible?

Exploring a Core Value: Voice and Self-Determination

- Do board, staff, and volunteers have the permission to speak up when they have an issue or concern? Do your constituents?
- Which voices in your organization have the most power? The least power? Do you believe this is the way it should be? What might it look like to ask those with the least power what decisions they would make?
- Who is able to participate in your organization's programs easily and who and what groups within your organization or community have barriers to participation because of their abilities, roles, language, or other indicators?



Group Reflection

VALUES, VOICE, AND BELONGING WORKSHEET

Insights, Organizational Accomplishments, Reflections, and Ideas

What insights or key takeaways resulted from your journaling?

Where do you believe your organization is doing really well in this area?



What are some potential opportunities you might have to improve a specific policy or practice at your organization?

Name three specific actions you could take in the next six months to improve your organization's capacity in this area?



Growing Your Skillset to Engage in this Work: Trusted Partners to Support Building Competencies



[Trauma-Informed Leadership: Why Self-Care Matters for Nonprofit Executives \(Nonprofit HR\)](#)

If you didn't know it already, wellness matters! Explore resources for supporting yourself and your team during challenging times. belonging is real.



[How to Develop and Use Core Values \(The Management Center\)](#)

The Management Center has a wealth of resources related to organizational culture, governance, and management. This quick read helps identify specific areas where you can improve values alignment, like onboarding, performance evaluations, and role expectations.



Tools and Methods to Expand your Practice: Leaning on Collective Wisdom



[Language Justice Toolkit \(Communities Creating Healthy Environments\)](#)

The Language Justice Toolkit is a resource for anyone who is committed to building spaces where people can communicate across languages. While some of the notes related to equipment are outdated, the framework stands and offers great advice, organizational assessments



[Access Check-Ins For Facilitators: Reinvent the Wheel Every Time \(The Curiosity Paradox\)](#)

An Access Check-In is a practice that comes from Disability Culture and the Disability Justice Movement. Learn more about this practice and how you can incorporate it into your meetings and convenings to ensure that all have the opportunity and ability to participate.



[Liberating Structures Menu \(Liberating Structures\)](#)

This free resource helps expand your meeting toolkit beyond presentations and brainstorming. Explore new protocols for meeting, planning, deciding, and relating to each other that ensure all voices are heard.



[Inclusive Language Guide \(University of Richmond\)](#)

This is a great, free, and quick reference for how to talk about people, avoid stereotypes, and keep two questions at the core: Do I need to include this detail? Have I asked how they want to be described?





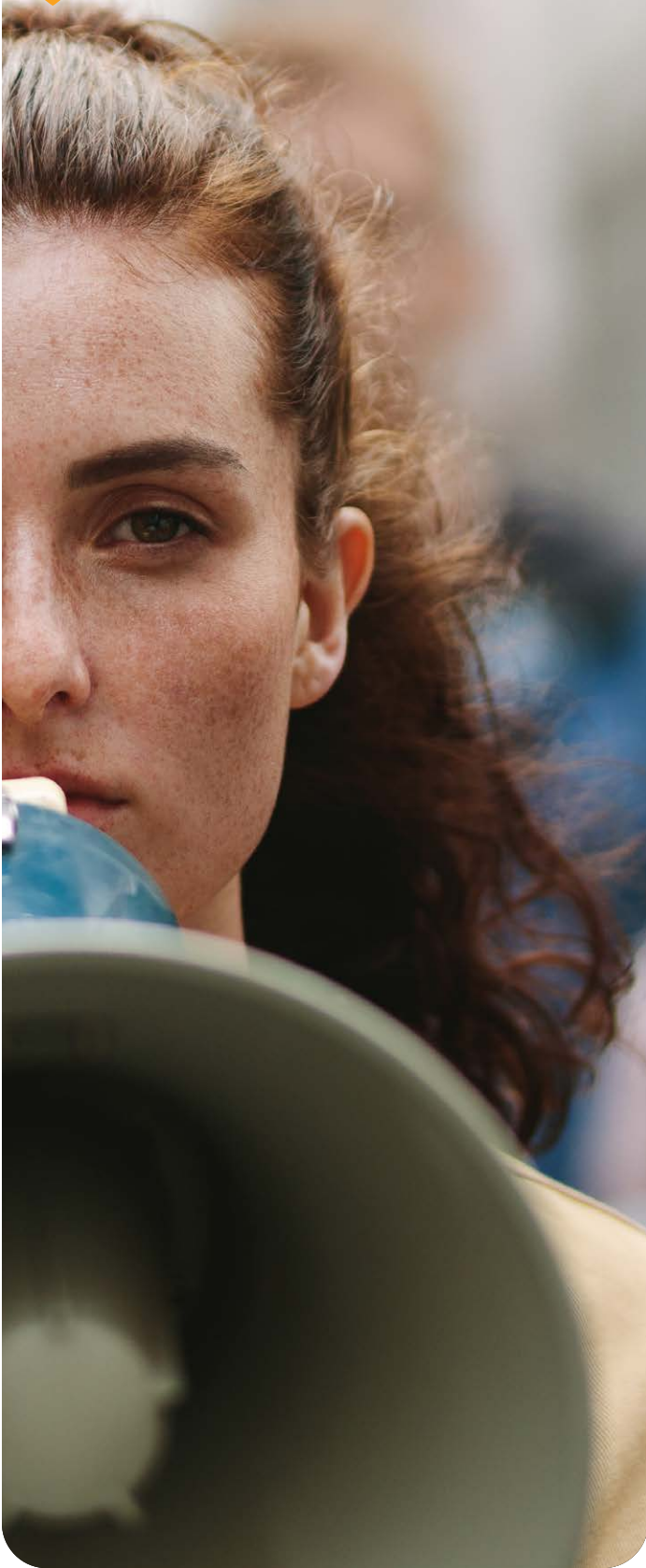
Civic Roots and Civil Society: Nonprofits as Civic Actors



"We don't necessarily have power simply because we're campaigning for outcomes that are intrinsically ethical or moral. That's where the craft of community organising to translate widely held values into power comes in."

- Theories of Change, James Whelan





The nonprofit sector plays a vital role in protecting civil society, democratic practice, and public participation. But too often, best practices only imagine nonprofits as service providers, not civic actors. The silos between strategy, fundraising, governance, and advocacy obscure the deeper role nonprofits play in shaping public life, especially in a moment of eroding democratic norms and rising surveillance.



Implication: The sector cannot fulfill its purpose without reaching back to its roots as the birthplace of democracy, fulfilling its role as trusted and protected civic space for people to come together to solve public issues and share dreams for the future.



Opportunity: Center nonprofits as civic institutions. Provide tools for meaningful community engagement, advocacy with integrity, and democratic practice as a core function of nonprofit work. Move along the spectrum from asking for community input toward creating the containers for community influence and ownership, especially in marginalized communities.

In this moment when so many of the communities we serve or who access our programs and services are facing increasing economic and social pressures and threats, it is even more critical for nonprofits to play a role in advancing their mission, vision, and purpose in the world at large.

Right now, a lack of action could lead not just to an unfavorable policy outcome, but to the dissolution of the independence of the nonprofit sector itself.

If you're experiencing challenges with speaking up and speaking out on behalf of your constituents and your mission in this moment, explore these prompts, worksheets, and resources to help work through these challenges and move to action.



Recalibrating Leadership Stances: Personal Learning



[An Introduction to Advocacy as a Change Strategy for Nonprofits \(Community Commons\):](#)

This open-source website provides a wealth of resources to help get you started on your advocacy journey. Don't try to take it all in at once – explore depending on your needs to help you influence people inside and outside your organization and make the connections between community needs and the decisions made by local, state, and federal lawmakers.



[Security to Wellbeing Framework \(Building Movement Project\)](#)

Often, direct service organizations don't see their role in public policy and advocacy efforts or are afraid their funders or donors may look down or prohibit such activity. This practice guide was created by service providers for service providers who are looking to amplify constituent voice in ways that align with their values and broaden the narrative.



[Bridging Differences Playbook \(Greater Good Science Center\)](#)

Some more risk-averse leaders are reluctant to wade into current issues and politics because they don't want to get into a fight or draw criticism from their community. But taking bold action requires having brave conversations across divisions. This is a long document, but it can be taken in small bites, and it offers practical activities to help bring down the temperature and center our values.



[The Values We Share: What People Want From Government \(PolicyLink\)](#)

This new research outlines findings that even across vast political divides, we have a shared vision for accountability, compassion, dignity, and opportunity. Explore more from PolicyLink for the work they are doing related to narrative shifts and language that resonates across divides.



Assessing Your Organization: Self-Reflection and Group Processes

Creating Civic Space

- Thinking about the kind of organization you are (human services, health, housing, arts, environment, culture, sports and recreation, social, advocacy, membership, funder, consultant, etc.), how does the work you do contribute to advancing, promoting, or protecting democracy?
- How are we creating spaces where people in our community can come together to solve problems, make decisions, and take action toward a shared vision? If this is not happening, what are opportunities we have, from our position, to organize for change?
- As polarization and isolation persists within our communities, what role can and should our organization play to build community across difference?

Building and Keeping Trust with Community

- What are the characteristics of people who can be trusted? What are the characteristics of organizations or institutions that can be trusted? Do we have and display those characteristics?
- If there have been instances of broken trust with our communities or partners, how have we approached repair? Or, how will we approach repair when it happens?

Building and Keeping Trust with Community Cont.

- What risk does our organization currently face related to lost funding or investigations related to diversity, equity, and inclusion work? How are we negotiating and balancing that level of risk with our commitment to our values?

Readiness for Advocacy

- What would your organization need to do differently or learn more about to take leadership on civic or policy issues?
- Can you think of a nonprofit doing advocacy or policy work in the community that you think your organization could model? What about an organization doing this that you would not want your organization to model?

Readiness for Lobbying

- Have your leaders talked about or agreed upon what types of public policy changes might lead to organizational action or what form that action would take?
- Have you asked your community what public policy changes might better support them or asked them to help make decisions about your policy agenda?



Group Reflection

NONPROFITS AS CIVIC ACTORS WORKSHEET

Insights, Organizational Accomplishments, Reflections, and Ideas

What insights or key takeaways resulted from your journaling?

Where do you believe your organization is doing really well in this area?



What are some potential opportunities you might have to improve a specific policy or practice at your organization?

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Growing Your Skillset to Engage in this Work: Trusted Partners to Support Building Competencies



[Bolder Advocacy Resource Hub](#)

Explore this resource hub for all things advocacy and lobbying from Bolder Advocacy and the Alliance for Justice by topic, issue area, and state. But, we recommend you start here, on the [“Break in Case of Panic”](#) page, for the most timely and relevant resources.



[Collaborative Problem Solving \(Convergence Center for Public Policy\)](#)

This quick how-to from a policy expert, skilled in facilitating nonpartisan conversations to identify actionable solutions in communities. While large policy shops may hire an organization like this, small organizations can still benefit from the outline and guidance in their organizing strategy.



Tools and Methods to Expand your Practice: Leaning on Collective Wisdom



[Benefits of Filing the 501\(h\) Election \(National Council of Nonprofits\)](#)

For organizations that are lobbying, filing this can clarify and simplify how you report expenditures.



[An Introductory Guide to Successful Advocacy \(Open Society Foundations\)](#)

This is an introductory resource for nonprofit staff or volunteers considering doing advocacy for the first time or who are just getting started.





Reframing Leadership and Governance: Power With, Not Power Over



“At the interpersonal level, power shows up in interactions. Power is relational. The liberatory goal is effective interactions. These are interactions that disrupt dominating behavior, or the taking of more than one’s share, and generate mutuality, changing as a result of our interactions with others. We can build our capacity for effective interactions, which we practice in everyday interactions, either contributing to unequal power dynamics or interrupting them.”

- Introduction to Power, Cyndi Suarez





Leadership and governance best practices in the nonprofit sector are in tension with values aligned to sharing power. Best practices often frame leadership as hierarchical: boards governing executives, executives managing staff, power flowing downward. Participants envisioned something else: reciprocal leadership built on trust, shared learning, and accountability in all directions.



Implication: When leadership structures reinforce hierarchy without mechanisms for mutual accountability, those leaders hoard and gatekeep power rather than sharing it with those most impacted by decisions.



Opportunity: Redesign leadership guidance to include models for co-governance, power-sharing, and distributed leadership. Include tools for shared accountability between executives and boards, staff voice in decision-making, and community accountability. Ensure job descriptions and competency frameworks for organizational leaders explicitly name culture-building and power-sharing as core leadership responsibilities, central to how the role is defined and evaluated.

You can feel it in the air. People are carrying a lot on their shoulders. And for nonprofit workers, especially those who interface with the public or lead organizations, the burden can feel double. We all have different relationships to and orientation to power, and too often we fail to have transparent conversations about who holds power (side note: everyone's got some!) and who makes decisions (everyone – every day), because nobody wants to be seen as failing.

If you're challenged to find the time and resources to grow your capabilities in shared leadership and collective decision-making (because you're too busy making all the decisions!), explore the resources, prompts, and tools below to help you build your own capacity, and the capacity of people across the organization and in your communities, to step into their every-day power. This can create a more leader-ful organization, AND it can allow you to finally get to that self-care you've been putting on the back burner!



Recalibrating Leadership Stances: Personal Learning



[The Spectrum of Community Engagement to Ownership \(Movement Strategy Center\)](#)

Leaders from across all sectors should dive into this introductory work on how to engage in community engagement efforts that advance community-driven solutions.



[Introduction to Power \(Cyndi Suarez, Nonprofit Quarterly\)](#)

Former Nonprofit Quarterly (NPQ) President and Editor in Chief describes the basics of power dynamics. If you're hungry for more, explore her writings and podcasts.



[Reimagining Nonprofit Boards: A Three-Part Series - Non Profit News \(Ananda Valenzuela\)](#)

This series of articles, based on the NPQ webinar, "A New Framework for Boards," envisions a way forward for boards eager to explore what it looks like to share power.



[Power Mapping: What It Is & How to Use It \(Harvard Business School\)](#)

A quick introduction to a power-mapping framework to help discover where power sits within organizations.



[Leading Forward - Leadership Transitions Resource Hub](#)

This resource library was created by a group of funders that have supported their grant partners through leadership transitions. Explore specific resources for nonprofits, with an emphasis on small, community-based organizations.



Assessing Your Organization: Self-Reflection and Group Processes

Sharing Power and Decision-Making Internally

- Which voices are missing in your organization when it comes to decision-making? Which people are most often left outside the “inner circle”?
- What kinds of decisions are organizational leaders (executive staff and board) making that could reasonably be made by other staff at the organization?
- Name two to three ways that staff at your organization are empowered within their role to take action and make day-to-day decisions?
- How could your board/executive partnership be improved by renegotiating roles and responsibilities to more explicitly share power?
- How could your executive leadership/staff relationships be improved by negotiating roles and responsibilities to more explicitly share power?

Nurturing a Culture for Shared Decision-Making

- What conversations are happening in our organization about power, trust, responsibility, and accountability? What outcomes are you seeing from those conversations?

Nurturing a Culture for Shared Decision-Making Cont.

- Would you say that your organization’s culture leans more toward learning from mistakes or more toward hiding or ignoring mistakes? How does that impact the work?
- How are staff encouraged or rewarded when they improve, innovate, or shift practice or policy based on feedback or input from constituents or coworkers.

Sharing Power and Decision-Making Externally

- How transparent with the community are your organization and its leaders about how they makes decisions that impact that same community?
- What are some ways we are currently collecting feedback about our work from constituents? How are we using that feedback?
- Thinking about two or three major organizational decisions in the past year, can you name an instance in which program participants or community members had significant influence over decision-making? What structures or practices, if any, are in place to support that kind of meaningful influence? If this has not happened, do you believe any of these decisions would have had a different outcome if program participants did have influence?



Group Reflection

POWER WITH, NOT POWER OVER WORKSHEET

Insights, Organizational Accomplishments, Reflections, and Ideas

What insights or key takeaways resulted from your journaling?

Where do you believe your organization is doing really well in this area?



What are some potential opportunities you might have to improve a specific policy or practice at your organization?

Name three specific actions you could take in the next six months to improve your organization's capacity in this area?



Growing Your Skillset to Engage in this Work: Trusted Partners to Support Building Competencies



Liberatory Design – National Equity Project Liberatory Design

This framework offers both a flexible process that can be used by teams and a set of leadership habits that can be practiced daily. It offers a different way to approach planning, program design, and collaboration that helps to bring the wisest voices to the forefront.



Toolkit for Worker Self Directed Nonprofits – Sustainable Economies Law Center

For nonprofits looking for a completely different way to organize their work, this guide lays out processes and templates for how you can establish a self-governing nonprofit organization.



Launchpad for Nonprofits (Philanthropy Together)

If you're looking for a different approach to fundraising that also engages your community, explore the tools and resources from Philanthropy Together, the global expert on collective giving.



Resource Hub (The Management Center)

This resource hub from The Management Center has practical tools you can implement right now for tactics for sharing power, including team check-in agendas, and techniques for more effective delegation, managing up and sideways, managing performance issues, and more. Even in all-volunteer nonprofits, many of these strategies can support stronger engagement!



Tools and Methods to Expand your Practice: Leaning on Collective Wisdom



[Principles of Community-Centric Fundraising \(Community-Centric Fundraising\)](#)

More organizations are exploring ways to broaden their donor base through authentic community engagement. This framework introduces a method for making fundraising more equitable and inclusive.



[The RAPID Decision-Making Tool for Nonprofits \(Bridgspan\)](#)

This quick read introduces a tool for addressing one of the key questions on decisions: Who should be involved and what role should they play?



[Sharing Power with Communities, A Field Guide \(Community Wealth Partners\)](#)

If you believe engaging communities is key to furthering your mission but you're not sure how to go about it in authentic and meaningful ways, this field guide offers practical tips and examples to help you engage and share power with the communities most impacted by your work.



[How to Plan More Effective Nonprofit Management Team Meetings \(Bridgespan\)](#)

Many nonprofit leaders report that their management meetings aren't as effective as they should be. This article offers practical guidance, templates, and tools to help your nonprofit leadership team optimize its meetings.





Shifting Culture: People-Centered Policy and Practice



*“Culture eats strategy for breakfast, operational excellence
for lunch, and everything else for dinner.”*

- Unattributed





You can't "policy your way" to transformation. Culture—how we show up, make decisions, hold conflict, and build trust—is what makes or breaks the Standards in practice. When there is a disconnect between values and implementation, even the best policies fall flat. To shift the sector, we must move from intention to integration, from documents to daily practice.



Implication: Policy alone cannot drive equity or transformation—it must be paired with shifts in mindset, relationships, and culture.



Opportunity: Expand resources to include facilitation guides, conflict navigation practices, leadership coaching, and lived examples of transformation toward healthy workplace culture. Invite organizations to treat policy development as a collective exercise in learning and trust-building.

We hate to break it to you. No one is reading the policy. Without the regular reinforcement of organizational culture and practice, there is too often a gap between what the policy says and what staff, board members, or volunteers do on a day-to-day basis. If you're struggling to translate what's on paper to what's in practice, you're going to need some of the tools below to support facilitation of policy development, building structures for trust and accountability, and, when all that fails, navigating the inevitable conflicts.

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Recalibrating Leadership Stances: Personal Learning



10 Steps Towards a Thriving Organizational Culture (RVC Seattle)

Understanding the nuances of culture-building can help groups shift from a narrow focus on organizational structure to a more holistic understanding of how we can relate to one another from a place of deep equity.



Toolkit: Trauma Informed Workplaces (Campaign for Trauma-Informed Policy and Practice)

This toolkit provides educational concepts and practical strategies to support team members (defined in this toolkit as employees, staff, workers, interns, fellows, C-suite leadership, human resources and administrative professionals, volunteers, committee and board members, etc.) in advocating for more trauma-informed workplaces.



Trading Glass Ceilings for Glass Cliffs (Building Movement Project)

This research outlines the additional challenges that leaders of color face in navigating organizational culture.



Assessing Your Organization: Self-Reflection and Group Processes

Operationalizing Your Values

- When you think of values that are people-centered, what values come to mind for you? For you, what does it mean to center people in organizational policy and practice?
- What kinds of policies or practices does your organization have in place to support a culture of accountability and trust?
- When we stray from our practices or values (or both!), do we have tools and ways to address the issues?

Policy Development

When you are reviewing a particular policy, here are some additional prompts to help shape that review:

- How can this policy be updated or created to ensure our value of “caring” (insert your values here) comes through?
- Have we considered how different people in our organization or in our community might be affected by this policy?
- Who has been involved in the creation of this policy, and whose perspectives or voices might be missing?
- Is this policy accessible (plain language, different languages, visual aids) to our broadest constituency—will they understand it if they read it?

Policy Development Cont.

- What can we reasonably accomplish and deliver, given our budget and resources? Are there partners that could support us in filling in the gaps?

Navigating Conflict

- Have you experienced a time when leaders in your organization navigated internal conflicts well? What made it successful? What conditions would need to be in place to enact this practice if we haven't seen it?
- How do people in your organization give critical or constructive feedback to each other? In what ways have you seen feedback go well? When has it not gone well?



Group Reflection

PEOPLE-CENTERED POLICY AND PRACTICE WORKSHEET

Insights, Organizational Accomplishments, Reflections, and Ideas

What insights or key takeaways resulted from your journaling?

Where do you believe your organization is doing really well in this area?



What are some potential opportunities you might have to improve a specific policy or practice at your organization?

Name three specific actions you could take in the next six months to improve your organization's capacity in this area?



Growing Your Skillset to Engage in this Work: Trusted Partners to Support Building Competencies



[Toolkit for a Stronger Movement: Employee Voice \(Sustainable Jobs for Organizers\)](#)

This resource and toolkit guides you through topics related to employee voice and compensation, supervision, professional development, and developing a caring workplace.



[Conflict Transformation and Restorative Justice \(Racial Equity Tools\)](#)

A library of resources to support generative conflict, mediation, and tools for healing.



Tools and Methods to Expand your Practice: Leaning on Collective Wisdom



[Reflecting on Staff Wellbeing Exercise for Nonprofit Teams](#) [\(National Council of Nonprofits\)](#)

Use this worksheet to guide a 60-minute team activity to reflect on wellbeing in the prior year and set goals for the current year. This [accompanying webinar](#) outlines the power of investing in nonprofit staff wellbeing.



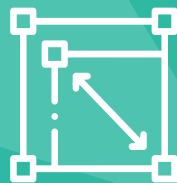
[Understanding Your Workplace Culture](#) [\(Nonprofit Association of Washington\)](#)

The first step in strengthening your workplace culture is to assess your current culture. Use the “Know Your Workplace Culture” worksheet to note how you would describe your culture across the three aspects (artifacts, behavior, and underlying values). Then describe what you want your workplace culture to become. Remember, you can change culture.





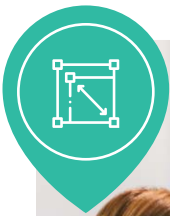
Excellence Comes in All Sizes: Right-sizing and Relevance



"If a man is called to be a street sweeper, he should sweep streets even as a Michaelangelo painted, or Beethoven composed music or Shakespeare wrote poetry. He should sweep streets so well that all the hosts of heaven and earth will pause to say, 'Here lived a great street sweeper who did his job well.'"

- From an October 26, 1967 speech to students at Barratt Junior High School in Philadelphia, Martin Luther King, Jr.





The divide between “best practice” and the lived realities of small, emerging, grassroots, or movement-based organizations is in clear tension. There is pressure to conform to a model of nonprofit excellence that doesn’t recognize their size, structure, lifecycle stage, or purpose as valuable. With this, benchmarks for better practice risk becoming a measuring stick that discredits rather than supports.



Implication: Holding all nonprofits to the same operational bar, without regard for context, size, or structure, upholds inequities.



Opportunity: Apply the principles of targeted universalism: clarify universal goals while creating differentiated tools that meet organizations where they are. This includes offering right-sized examples, acknowledging nontraditional structures (like co-leadership or collectives), and inviting funders to rethink what “capacity” really means.

There are many factors that influence what excellence can mean for your organization.



What is the organization’s budget?

Many small nonprofits are doing excellent work, but lack the resources or capacity to meet best practice benchmarks that may not even be applicable to their context. Considering the size of your organization’s budget, what policy and practice elements are most necessary to adopt?



Does the organization have staff?

The complexity of your operations and the role of the board will vary if you have no paid staff, only one or a few paid staff, or hundreds of paid staff positions. In organizations without paid staff, a working board functions very differently from a governing board where key organizational functions have been turned over to staff.



Where does the money come from?

Organizations that rely on individual donations, institutional grants, government contracts, or fee-for-service models face genuinely different challenges — in capacity, in relationships, and in what fundraising actually requires of them. You’ll want to develop strong partnerships and relationships based on your organization’s sources of income.



Recalibrating Leadership Stances: Personal Learning



[Equitable Intermediaries: Power, Protection, Partnership \(Movement Strategy Center\)](#)

Not every nonprofit needs its own 501(c)3 status. Learn how intermediaries can be power partners for small community-based organizations and small nonprofits.



[Fiscal Sponsorship Guidelines \(National Network of Fiscal Sponsors\)](#)

If you're considering fiscal sponsorship, learn more about how good fiscal sponsors should operate by exploring the resources available from this national network of experienced fiscal sponsors.



[Mutual Aid Toolkit \(Sustainable Economies Law Center\)](#)

This toolkit, developed during the pandemic, is still relevant for many small community-based organizations who are organized more like mutual aid efforts than traditional nonprofit structures. Explore issues like whether to form an entity, liability, decision-making, managing funds, and data security.



Recalibrating Leadership Stances: Personal Learning



[New Organizational Structure Models are Toppling the Staff Pyramid \(Dorothy A. Johnson Center for Philanthropy\)](#)

If you're considering or implementing a shared leadership model, explore some of the basic models here.



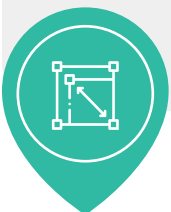
[Full Cost Resources \(Nonprofit Finance Fund\)](#)

Start with a budget that fully funds operations and programs in support of shared community goals. Explore these resources to help make the case for fully funding your work.



[Scenario Planning Toolkit](#)

This resource from Bridgespan helps organizations engage in scenario planning – the practice of planning not for just one future, but several. When things are constantly shifting and anxiety is high, this exercise can help you set priorities, determine decision-points, and move forward with confidence.



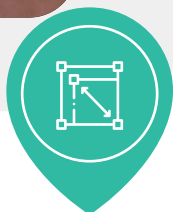
Assessing Your Organization: Self-Reflection and Group Processes

Key Infrastructure

- What are key areas of infrastructure (eg, marketing, finances, technology) that you are struggling with and could use additional support?
- What community assets or partnerships could help you build the capacity you need most right now?

Defining Excellence

- How would you define “excellence” for your organization, in ways that are different from the typical checklist of nonprofit best practices? What can you brag about right now?
- When you consider the elements explored in this roadmap (civic responsibility, sharing power, and centering people), what areas might you need to grow to bring your values to the forefront?



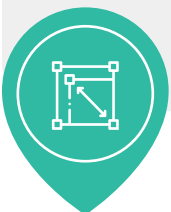
Group Reflection

RIGHT-SIZING AND RELEVANCE WORKSHEET

Insights, Organizational Accomplishments, Reflections, and Ideas

What insights or key takeaways resulted from your journaling?

Where do you believe your organization is doing really well in this area?



What are some potential opportunities you might have to improve a specific policy or practice at your organization?

Name three specific actions you could take in the next six months to improve your organization's capacity in this area?



Growing Your Skillset to Engage in this Work: Trusted Partners to Support Building Competencies



Your State Association

If you're not connected with PANO, or with the nonprofit association in your state, explore membership options, as you can often access discounted consulting, training, and resources to support your work. Some state associations have partnerships with state governments or funders that help cover the cost of membership for small nonprofits.



Standards for Excellence Institute and PANO

Through our partnership with the Standards for Excellence Institute, PANO members can access a wealth of educational resources that support all areas of nonprofit governance and management, and can be helpful wherever you are starting your journey.



Finding a Consultant

When you're ready to tackle a specific issue, you may need to access outside help. The [consultants in Pennsylvania](#) or [nationally](#), are well-grounded in better practices for nonprofits and well versed in working with organizations of all sizes and types.



Tools and Methods to Expand your Practice: Learning on Collective Wisdom



[Standards for Excellence Basics Assessment](#)

This free online assessment, provided by the Standards for Excellence Institute and PANO, can help you identify areas where your organization is excelling or may need to grow its capacity. You should plan to spend about an hour on this assessment, and you will receive a report you can download.



[Nonprofit Ready](#)

The Cornerstone OnDemand Foundation offers more than 600 free learning resources to help you enhance your skills with online learning and how-to guides. Yes, it really is free.



[The PANO Navigator](#)

This online resource hub brings together trusted, up-to-date resources to help Pennsylvania nonprofits stay informed, prepared, and supported. Everything here is curated by PANO to ensure nonprofits can quickly find reliable tools, guidance, and examples from across the Commonwealth and beyond. The goal is to save you time, reduce overwhelm, and help your organization stay grounded and effective no matter what challenges arise.

We're doing our best to curate as many free resources and/or resources available to PANO non-members as we can, but some things will be only available to members or will have a fee associated with them.

***Have a resource or tool that has helped you during a critical time?
[Share it here!](#)***



Special Section: How Can Institutional Funders Help?



Not only can funders use some of the tools and resources introduced here to support their own practice, but they also have an opportunity to step up in this moment to support their nonprofit partners' values, voice, belonging, nonprofit advocacy, civic and community engagement, power-sharing, and people-centered practice.

It will take both dollars and non-financial support to help nonprofits implement this crucial work. It will also take funders who are willing to examine their own practices and change how they relate to their grant partners.

Below are some resources for funders who want to do more to support nonprofits' ability to do good – and do it well.



Community-Driven Philanthropy **(Grantmakers for Effective Organizations)**

This publication series focuses on the idea that grantmaking is most equitable and effective when it meaningfully engages and includes a broad and diverse set of voices – including nonprofits, communities and key partners.



Great Funder-Nonprofit Relationships (Exponent Philanthropy)

A self-diagnostic tool and discussion around power dynamics between nonprofits and funders



Additional Resources



Fund the People Toolkit (Fund the People)

A free, comprehensive resource to help you maximize investment in the nonprofit workforce.



Coming Together, Not Apart: A Three-Part Series on Collaboration (Council on Foundations)

This series of reports explores philanthropy's involvement in developing the heartset, mindset, and skillset to lead collaboratively across differences.



Courage in Practice: Principles for Peak Grantmaking

These resources help funders operationalize their commitment to reducing the burden on their nonprofit partners.



Trust-Based Philanthropy

Explore the six key practices of trust-based philanthropy: multi-year unrestricted funding, doing your own homework, simplifying and streamlining paperwork, being transparent and responsive, acting on feedback, and offering support beyond the check.



Focus on Foundations (Bolder Advocacy)

A wealth of resources to help foundations navigate the complex, but not insurmountable, rules governing advocacy.



Community Ownership: Emerging Models and Roles for Philanthropy (Mission Investors Exchange)

This case study and research report reviews community-driven approaches to investments such as land trusts, cooperatives, real estate investing, and Tribal land repatriation.





Acknowledgements

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About Us

PANO (the Pennsylvania Association of Nonprofit Organizations) is a statewide membership organization supporting the thousands of nonprofits that serve millions of people in the Commonwealth.

While other associations cater to specific nonprofit trades, PANO is the only membership organization that supports Pennsylvania's nonprofit sector as a collective whole.

We support nonprofits through training, best practices, consultation and discount programs. We amplify their impact through research, public policy initiatives and advocacy.

PANO is accredited by the Standards for Excellence Institute, signifying that the organization practices the highest level of ethics, accountability and transparency.



In Partnership With: Colmena Consulting

About Colmena Consulting

Colmena Consulting is a producer cooperative for consultants, facilitators, strategists, and coaches who work with organizations, networks, and individuals to co-create transformative solutions.





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