



Session Notes

Empathy in Action Part I

Overview of Empathy

- Empathy is derived from the Greek words on the PowerPoint slide, which essentially can be translated as **“in or among another’s experience; in or among what one has suffered; in or among the emotions of a person’s soul”**.
- One definition of empathy is “The ability to be aware of, understand, and appreciate the feelings and thoughts of others.”
- Breaking down this definition:
 - Awareness: **picking up on someone else’s vibes, sensing, or tuning into what they feel and think.**
 - **Understanding person at a deep level - picking up on the nuances of why they’re experiencing what they’re experiencing.**
 - Legitimately being among or within their experience, their suffering (what has happened to them), and among their actual emotions.
 - The final piece of the definition is appreciating another’s thoughts and feelings.
 - Appreciation is derived from the **Latin word pretium, which means money, as well as worth, value, or price. Appreciating someone else’s thoughts and feelings thus means valuing them and believing that they have real worth.**

- Empathy does imply that, for at least a few moments, you're able to **temporarily transfer yourself into someone else's experience - you see what they see, think what they think, and feel what they feel.** And you go one step further, you actually value those thoughts and feelings - you believe they matter.
-

Reflection Questions:

- **Why is empathy a key ingredient to realizing HCB's vision of community?**
 - **What significance does empathy have for you, the empathetic person?**
 - **Why is it important to the relayer of the information, the person who is telling you their story?**
 - **How would you characterize an empathetic person?**
-

Empathy in Action

- **What does empathy look like in action?:**
 - Care about others
 - Real interest and concern
 - You can actually articulate, without judging that person, what the other person's perspective is, even if you do not agree with it or if you find it absurd
 - See and experience world from another's perspective
- **What it isn't:**
 - Being nice; being nice does not qualify because it does not capture the full totality of empathy (awareness, understanding, and appreciation)
 - Agreeing - empathy doesn't involve judgment or analysis
 - Sympathy - sympathy puts the emphasis on the listener, rather than the speaker

- **Why Empathy?**
 - Builds bridges
 - Creates strong connections
 - Can ease tension and turn adversarial relationship or conversation into a collaborative one
 - **Benefits of Empathy:**
 - Other person feels validated
 - Can turn any relationship into a much stronger bond
 - **How to display empathy:**
 - Take a step back
 - Ask clarifying questions about what you think might be the case
 - Be present - keep rolling with the situation, following the speaker's story
 - Dig deeper
 - Rephrase / paraphrase, using person's own words, what you think the other person might be feeling or thinking, then pause
-

Reflection Questions

- What is an example of a time when someone was empathetic towards you? How did that make you feel?
 - What about a time when someone wasn't empathetic towards you? How did this make you feel?
-

Principled Leadership

Baseline Survey Results (as of 9/10/21)

- **100% of respondents agreed:** I believe it is extremely important for the Harvard Club of Boston to have a set of clear principles that guides its actions.
- **100% of respondents agreed:** I am very committed to abiding by the Harvard Club of Boston's Diversity, Equity and Inclusion Affirmations, Mission, and Values.

The case for Principles:

- Principled Leadership is the heartbeat of a values-driven organization. In order for an organization to stand for something, it must be driven by people who stand for something.
- The importance of values has never been more evident.
- The world is at a critical juncture - values have shifted; priorities have changed; resulting in a revolution of sorts, in which growing numbers of people are building their lives around organizations and activities they believe in.
- The "Great Mass Resignation" has taken hold. People are quitting their jobs in droves in search for more alignment.
- People want to belong to something that represents their vision of the world.
- 1 year post George Floyd's murder, what organizations have made progress and amplified their DEI&B efforts? Where are they now? What organizations have begun to shift their culture? What does that look like?
- The basis of Principled Leadership is clarity. Clarity of personal values. Clarity of vision. Clarity of strengths. Clarity of preferences. It is critical to know yourself.
- Values driven organizations are in high demand. These are the places people want to be associated with. The identity of the organization is leveraged to further amplify the persona of the individual. That affiliation means something.

Reflection Question

- What does your affiliation with the Harvard Club of Boston say about you?
- Which of your personal values line up with the values of the Club?
- How can the Club consistently communicate its values through the member experience?

-
- **Affiliation through values drives consumer behavior. People spend their money and time in places that they believe in.**
 - If you want to capture the hearts and minds of people in 2021, you have to create deep impressions of respect, intellectual curiosity, and delight. People need to feel something when they think about your brand/organization.
 - It is the feeling that brings people back. The feeling that causes them to invite other like-minded peers.
 - The feeling is what creates community; becomes magnetic; and attracts like-minded people into the fold.
 - Values-driven organizations benefit from the collective stakeholders' interest in seeing the organization's vision come to life. Members, staff, and Leadership all have a vested interest in seeing the organization thrive. This interest serves as motivation and momentum, constantly reminding each individual of their "why."
 - Being values-led can amplify the reach of an organization. It broadcasts a clear message to the right people that this is a place that represents what you believe in; where you can meet like-minded people; where you can embark on a journey filled with moments of meaning.
 - Principled leadership positions an organization to respond appropriately to the changing tides. Leadership that is empathetic and fully appreciative of the experiences of others within the organization creates strong bonds and deep loyalty among employees, board members, and other stakeholders.

Empathy in Action Part II

- Empathy between and among members of the Harvard Club of Boston's Leadership - between and among Executive Staff and the Board of Governors.
- In reviewing the data that board and executive staff members submitted, it is manifestly clear that the use of empathy is not uniform across the board, and in many cases, it is disregarded completely.
- The Club's Leadership absolutely has an empathy problem. If there were just one or two instances of a lack of empathy, we wouldn't be focusing on this topic at length. That is simply not the case, so it merits awareness, attention, and action.
- Based on the data, there have been breakdowns in trust and communication. People are feeling judged, not taken seriously, disrespected.
- **If empathy is foundational to creating community, which it is, and if Leadership isn't empathetic toward each other (and effectively lacks real community), how can we expect Leadership to create a vibrant, connected, and welcoming community more broadly, where everyone truly feels she, he, or they belong?**
- No one is perfect, but it's certainly within reason to expect a few minor instances of a lack of empathy, and Leadership to by and large demonstrate empathy within this micro version of the community. Doing so is the only way for the Harvard Club of Boston to realize its larger, really powerful vision of creating such a community for its membership overall.
- You all have the power to change this. You have the power to create a strong community amongst yourselves that will ripple throughout the entire organization. I know for a fact that you all care deeply about this organization, and I believe you do care about each other.

- Given that you care so much, and now that you're aware this is a problem, you can make a decision to focus on it going forward, take action, provide feedback to each other, and course-correct when empathy is not used. Of course, it's easier said than done, and a certain degree of psychological safety needs to be in place for such conversations to even unfold. We'll discuss psychological safety during our next Mini-Retreat.

Some background:

- I have served on 10 or so non-profit boards, including multiple school and educational boards. I was on the Board of Trustees for my school in Cincinnati, The Summit Country Day School, which is an independent, coed, Catholic school and is considered one of the best schools in the Greater Cincinnati region. I served on the board for four years in a variety of capacities, including serving on the Search Committee for the Head of School.
- In addition to my own board experience, I have launched and run two non-profits that included influential board members - owners of a Major League Baseball team, major philanthropists, executives at multi-billion dollar corporations, and partners at leading venture capital firms.
- Essentially, I have experience on both the executive staff side and the board member side; I have studied and been trained in non-profit board governance and executive leadership.
- Additionally, because the membership club world is different (in some ways) than my previous training and experience, Rebecca and I conducted research in private club board governance and met with private club industry leaders, including Dr. Jim Butler, the CEO of Club Benchmarking - nationally-recognized leaders of business intelligence, club finance, governance, and leadership for the private club industry. Additionally, we met with both Jeff Morgan, the CEO, and Dr. Jason Koenigsfield, head of Education + Professional Development, both of whom are at the Club Management Association of America (CMAA), which is the largest trade association for private club leadership in the world. CMAA and Club Benchmarking partner with more than 3,000 private membership clubs

throughout the nation and world, and they have an extensive focus on leadership and governance.

- I'm going to briefly cover some of the insights from those conversations and research regarding governance best practices.
- All of this is relevant to empathy because a major part of empathy involves understanding other people. People's roles and responsibilities largely inform how they interact with others in their organization and even who they are as people, to an extent. It follows that understanding individuals' roles and responsibilities goes a long way in helping a person cultivate empathy with these same individuals.

Best Practices Leadership Insights

- **Care, focus, and emphasis placed on leadership**
 - GM and executive staff are really good at what they do
 - Finding the right board members, who have diverse backgrounds, bring different perspectives, not just group think
- **Focus on empathy**
 - Valuing other people's values & respecting other people's viewpoints
- **Stand up for what's right**
 - Younger generations and diverse generations don't want to be in singular settings of people - they want diversity, want to be challenged in their thoughts to learn
 - Believe this is going to be a strategic advantage down the road
- **Alignment**
 - Values of leaders align with the values of the club
 - People believe in club and leaders of the club
- **Emphasis on roles & responsibilities**
 - They all are clear on their roles and responsibilities
 - They know and respect their respective roles, and they execute them at a high level

Best Practices Board & Club Insights

- **Constantly Evolving**
 - Understanding demographic shifts, the different dynamics that impact their Club, who their members are, etc.
 - Based on new data and information, board makes strategic decisions going forward, the vision changes
 - Willing to try new things - such as hiring formerly incarcerated folks
 - Questioning things they thought they knew, including policies, standards around dress, what's acceptable, what's not, etc.
- **Exceptional Experience**
 - What org sells is the experience
 - Member satisfaction is combo of great amenities, quality, and service
 - Focus on improving the membership experience
 - Expenses are good because they allow them to put more money into member services
- **Transparency**
 - Transparency, share conversations, help members understand what's happening in the boardroom so it's not a secret
 - Open and honest discussions and relationships among board members and with their top executive
 - Respectful of others' opinions
 - Highly-collaborative
- **Diversity**
 - creating an open policy to bring in the best people and not subconsciously discriminate against people
 - Family-focused

Board Members Best Practices + Insights

- **Focused on strategic governance**

- Boards focus almost all of their energy and time on strategic direction, policies, and governance - what is in the best interests of the club?
 - Board doesn't spend time on operations - that's what the GM and executive staff do
 - Board members aren't focused on their own interests
 - Executive staff and rest of the staff, led by the GM, actually implement the strategy
 - Develop and maintain an effective strategic plan that focuses on what actually moves the business (member experience and physical assets)
 - Succession planning for officers and board members
- **Focused on the long term**
 - Have strategic plan in place
 - Have long-term financial plan that aligns with strategic plan
 - Focused on increasing the capital base
 - Understand demographic trends, including attrition and membership base in 10 - 20 years
- **Understand not-for-profit business model**
 - Operations break even
 - Every board talks about how much money you make or lose in food and beverage
 - Data shows that clubs that lose the most money in food and beverage are the most successful and financially-sound ones
 - Clubs are in the dues and membership business - amenities of the clubs are subsidized
 - Dues are to subsidize all the operations
- **Take fiduciary responsibility seriously**
 - Really know the financials, such as the net worth of the club, the net property plan, gross assets, payroll, capital income, etc.
 - Balance sheet drives financial performance
- **Crystal clear on club's business model**
 - Can articulate its club's strategy and business model very simply
 - In some cases, use a balanced scorecard to keep board accountable to the strategy and business model

Roles & Responsibilities of Board of Governors, GM, and Staff

(high-level, not exhaustive)

Area	Board of Governors	General Manager	Executive Staff / Staff
Long-Term & Strategic Goals	Leads process	Provides input	Provide input
Day-to-Day Operations	No role	CEO + COO	Execute w/ GM's direction
Budget + Capital Purchases	Approves	Recs to Budget Committee	Make recommendations
Supply Purchases	Approves budget, makes recs to GM	Manages all supply purchase requests	Make recommendations
Policies (e.g., fees, personnel, etc.)	Establishes, w/ GM's input	Provides input, adopts, and administers	May provide input; abide by policies
Staff Hiring, Performance, and Evaluation	GM only	Oversees for all Staff	Involved w/ direct reports
Membership Growth	Develops strategy in collaboration w/ GM	Collaborates w/ Board to develop strategy and implements	Make recommendations and implement strategy
Culture + Values	Co-creates w/ GM	Co-creates w/ Board and oversees them	Adhere to them
Employee Engagement + Morale	GM Only	Oversees + manages for all Staff	Provide feedback to GM
Board Engagement + Morale	Solely responsible	Provides input, based on interactions	No role