

THE ART OF SAYING NO

Power, Hierarchy, and the Responsibility of Leadership in Advancement Services

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Executive Summary

There is no shortage of professional advice about saying no. Set boundaries. Protect your time. Don't overcommit. Push back when a request is unreasonable. Learn to manage up. Don't be afraid to tell someone that their request cannot be accommodated.

Much of this advice is sensible. In Advancement Services, where demand routinely exceeds capacity, the ability to establish boundaries is an important professional skill. Records need updates. Reports are needed. Fundraisers want information. Database problems need to be solved. Leaders want something "just this once." There will always be more work than there is time to do it.

But advice about saying no often begins from an assumption that deserves closer examination: that the person being asked to say no has the power to do so.

Saying no is not merely a communication behavior. It is an exercise of organizational power. In practical terms, saying no determines the allocation of scarce organizational resources: whose request takes priority, which work gets delayed, which standards are maintained, and which exceptions are permitted.

Saying no requires more than individual confidence or communication skill. It requires an organizational environment in which leaders recognize the power differentials that shape who can enforce a boundary, make priorities and decision rights explicit, and accept responsibility for the exceptions they authorize.

When those conditions are absent, the organization does not eliminate the need to make difficult decisions; it just transfers that responsibility to the people with the least authority to resolve the resulting conflicts.

For Advancement Services, this problem is particularly consequential because our work sits at the intersection of organizational standards and everyone else's day-to-day jobs. We operationalize decisions about data, research, portfolios, systems, compliance, and process, yet we may not control the organizational priorities or relationships that determine whether our standards are respected. The responsibility of leadership is therefore not to cheerfully encourage employees to speak up. It is to build an organization in which professional judgment can be exercised with legitimate authority, and in which the people expected to enforce standards are not left to absorb the consequences when more powerful colleagues want exceptions.

Raising Our Voices

Organizational research has long recognized that speaking up at work is shaped by hierarchy, not simply by whether employees are confident enough to speak. It is a literature about what happens when people communicate across organizational relationships that are unequal in power and status.

Elizabeth Morrison describes upward voice as the voluntary communication of suggestions, concerns, information about problems, or work-related opinions to someone in a higher organizational position. (Morrison, 2014; Morrison, 2023).

> Having a voice and having agency are not the same thing.

Pfrombeck, Levin, Rucker, and Galinsky's (2022) "Hierarchy of Voice" framework makes that relationship between voice and hierarchy particularly explicit. Whether someone speaks, how their voice is received, and what happens afterward are influenced by the relative positions of the people involved.

Detert and Treviño (2010) similarly found that employees' perceptions of leadership relationships and authority influence their willingness to speak to higher-ups.

The addition of power, hierarchy, authority, and status matters because not only does it push us past the notion that speaking up is about confidence; it also highlights our tendency to conflate the ability to speak up with the authority to make a decision.

Those are not the same thing.

An employee may be told that they are empowered to push back. They may be encouraged to set boundaries with colleagues. They may even be explicitly told that it is acceptable to say no. But permission to speak is not necessarily authority to decide.

Psychological Safety vs. Organizational Authority

Consider an ordinary Advancement Services interaction: a coordinator receives a request from a senior fundraiser that conflicts with the department's established process.

The coordinator knows that fulfilling the request will disrupt other work, create an exception, or undermine a standard. The organization may tell that coordinator, in theory, that they

have permission to say no. But the coordinator also knows that the person making the request has considerably more positional authority, institutional status, or influence.

The coordinator may technically be *allowed* to say no. Whether they can do so without negative consequence is a very different question.

> An entry-level employee should not be required to determine whose work is important enough to displace someone else's.

And even if they can, whether they feel safe doing so is still another question. That tension gives rise to another important concept in organizational research: psychological safety.

Psychological safety is central to whether people believe they can take interpersonal risks without fear of punishment or humiliation, and the literature has established its relationship to voice, learning, teamwork, and other constructive organizational behaviors (Edmondson & Lei, 2014; Edmondson & Bransby, 2023).

But psychological safety and authority are not interchangeable. Psychological safety asks, in effect, "Do I believe it is safe for me to speak?" Authority asks, "Do I have the legitimate power to decide what happens next?" Neither question is independent of organizational hierarchy. But an employee can feel both safe and empowered to tell a manager that they think something is a bad idea while still having no authority to stop the organization from pursuing it.

That distinction becomes particularly important when we move from voice to enforcement. Saying, "I think we should reconsider this," is an exercise of voice. Saying, "We will not do this because it violates our established process," is an exercise of organizational authority. The first asks to be heard. The second establishes a boundary.

We should not confuse an employee's willingness to exercise voice with an organization's willingness to give that employee legitimate authority. An employee may be encouraged to raise concerns while still lacking the authority to enforce a standard, resolve a conflict, or prevent an exception. When organizations treat these as equivalent forms of empowerment, they mistake permission to speak for the power to act. The distinction matters because it changes the question from whether an employee is prepared to say no to whether the organization has established who is entitled to make that decision.

The Fallacy of “Saying No” as an Individual Skill

Once saying no is understood as an exercise of power, another problem becomes visible: organizations often treat the ability to say no as an individual, professional skill.

The advice is familiar. Be assertive. Set boundaries. Manage up. Don't be afraid to push back. Learn to have difficult conversations.

There is nothing inherently wrong with any of this advice. Professionals need to communicate clearly, advocate for their priorities, and raise concerns, and organizations benefit when employees communicate information that might otherwise remain unspoken (Morrison, 2014; Morrison, 2023).

> “Just say no” is tone deaf advice.

The problem arises when an organizational problem is converted into an individual competency.

If an employee is repeatedly expected to negotiate competing priorities, enforce boundaries, and reject requests from people with greater positional authority, telling that employee to become better at "saying no" solves for the wrong problem. Sometimes the organization has not even made the decision that the employee is now being asked to make.

Consider two responses to the same request:

1. "I can't do that."
2. "Our process doesn't allow us to do that."

They may produce the same immediate outcome, but organizationally they are very different statements. The first is a personal refusal. The second invokes institutional authority. In the first, the employee is positioned between the requester and the desired outcome, and the employee owns much of the interpersonal discomfort associated with the decision. In the second, the employee is communicating a decision that exists outside the individual. The organization has established the boundary; the employee is applying it.

If an organization has established a five-day turnaround for a particular type of research request, an individual research professional should not have to personally determine whether an influential fundraiser deserves an exception. If the organization has established data standards, a database professional should not have to decide whether a senior employee is important enough to be exempt from them. If a team has finite capacity, an

entry-level employee should not be required to determine whose work is important enough to displace someone else's.

Those are questions of governance, not assertiveness.

You can imagine the increased organizational risk inherent in making boundary-setting an individual competency rather than a well-designed and leadership-support process: Instead of deciding what requests take priority, the organization tells employees to “manage their workload.” Instead of establishing service levels, it tells them to “manage expectations.” Instead of defining which exceptions are legitimate, it tells them to “use their judgment.” Instead of determining who has authority to override a standard, it tells them to “push back.” The ambiguity remains. It has simply been transferred to someone with less positional power.

That is what happens when an organization individualizes a structural problem. The employee becomes responsible for deciding how much work is too much, which request is important enough, which exception is justified, and how much resistance is politically safe. It may look like empowerment from the outside, but poorly delegated ambiguity is inherently disempowering.

Boundaries, Not Boldness

Having a voice and having agency are not the same thing. Burris and colleagues (2023) have examined what happens after employees speak up, including the role of the recipient's hierarchical position and resources in determining whether that voice can actually be implemented. A person may successfully communicate a concern and still lack the authority to do anything about it.

> Poorly delegated ambiguity is inherently disempowering.

The better alternative is to move appropriate boundaries out of the realm of the individual and into the organization.

An experienced director may have enough organizational capital to tell a vice president that a request is not going to work. A new coordinator may not. That does not necessarily mean the coordinator lacks judgment. It may simply mean the organization has not yet given that person the positional authority, relationships, or accumulated credibility that make direct refusal relatively safe.

A well-designed system should not require every employee to possess the political capital of a senior leader in order to enforce an ordinary organizational standard. The goal, then, is not to make people brave enough to say no. It is to make organizational priorities clear enough that no one has to be brave.

When Leadership Makes the Rules Optional

The individual-versus-organizational problem becomes more serious when leadership establishes a standard and then expects someone with less authority to enforce it against someone more powerful. It happens all the time.

The organization has a data quality standard, and a senior leader wants an exception. The research department has a defined intake process, and an important fundraiser wants to bypass it. Advancement Services has established a service level, and an executive wants a request handled immediately. The organization has portfolio criteria, and a senior fundraiser wants to keep a portfolio assignment that does not fit.

> Employees learn that standards are firm until someone sufficiently important objects.

Now someone downstream has to say no.

This is not simply a boundary-setting exercise. It is an exercise in enforcing organizational authority upward. The requester has more positional power.

An Advancement Services employee in this position is left with three options:

1. Enforce the standard and risk an uncomfortable interaction with someone more powerful.
2. Make the exception and undermine the standard.
3. Escalate the decision to someone with sufficient authority to make the exception explicitly.

The organization has converted an institutional decision into an interpersonal confrontation, leaving the person with the least power in the interaction to absorb the interpersonal cost. This is why "just say no" is tone-deaf advice. Without formal rules and leadership support for those rules, we set up staff to fail.

Standards are Not the Death of Judgement

There is a reasonable concern that formal rules can constrain professional judgment. No organization can anticipate every circumstance, and professionals working in complex environments routinely encounter situations that require interpretation, adaptation, and decisions that no written procedure can fully prescribe (Evans, 2015; Lipsky, 2010). Discretion is a necessary feature of professional work, not simply a personality trait possessed by unusually confident employees. The ability to recognize when a situation calls for something other than the standard response is part of what makes professional judgment valuable.

But discretion within a system is not the same as authority to change the system. A professional may need room to interpret a standard, weigh competing considerations, or recommend an exception. That does not mean the professional has the authority to waive the standard, nor should the organization leave them to determine whether a more powerful colleague is entitled to an exemption. Discretion concerns the exercise of professional judgment; authority concerns who is entitled to make a decision on behalf of the organization.

When organizations fail to distinguish between the two, they push governance downward. The person with the least positional authority becomes responsible for deciding whether the organization's rules apply in a particular case, often without the authority to enforce the decision or the institutional support to withstand the consequences. The issue is not that the organization has too many rules or that professionals need more freedom to disregard them. It is that the organization has failed to establish who can interpret a standard, who can authorize an exception, and who is accountable for that decision.

Leading with Integrity

Tony Simons's (2002) concept of behavioral integrity is useful here because it highlights the importance of both perceived and actual alignment between managers' words and deeds. Organizations communicate their actual values not only through what leaders say, but through what leaders do.

- If leadership says data quality matters but routinely authorizes exceptions to data standards, the organization has communicated something more powerful than the policy itself.
- If leadership says portfolio discipline matters but permits senior fundraisers to retain portfolios outside the agreed criteria, that is the operational policy.
- If leadership says requests must enter through a defined process but powerful people can bypass the process whenever they want, then the process is not actually the process.

The written policy says one thing and organizational behavior says another. In every workplace, employees learn which one actually matters pretty quickly, because culture eats strategy for lunch.

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Authority vs. Accountability

The point is not that every exception is wrong. Exceptions are sometimes necessary. Circumstances change. Policies are imperfect. Good professionals should be able to recognize cases that genuinely fall outside an existing rule.

But there is a crucial difference between an authorized exception to a rule and an informal exemption for someone with enough power to request one. The first is governance. The second is hierarchy masquerading as discretion.

If an exception is genuinely warranted, the leader with authority should own that decision. They should be able to say, plainly, that this is an exception to the normal process and that

they are authorizing it. That is fundamentally different from telling an Advancement Services employee, implicitly or explicitly, to figure out how to make the exception happen. The first preserves accountability. The second transfers accountability downward.

That downward transfer creates a dangerous organizational incentive. Employees learn that standards are firm until someone sufficiently important objects. The people closest to the work then become responsible for negotiating the exceptions, managing the relationships, and cleaning up the operational consequences. Standards cease to function as standards when they are optional for the people with the most authority.

This does not mean leaders should never exercise discretion. Leaders necessarily have discretion. But leadership discretion should come with leadership accountability. If a leader wants to change a rule, change the rule. If a leader wants to authorize an exception, authorize the exception. If the organization has decided that a particular circumstance warrants different treatment, make that decision explicit.

What should not happen is for leadership to retain the authority to waive a standard while requiring someone downstream to bear the social and operational cost of doing so.

The Hero Problem

Sometimes the person who finally says no feels *great* about it.

> Organizations can and will reward people for compensating for bad design.

The Advancement Services professional who tells a vice president that an exception will not be made may walk away from the conversation feeling competent, courageous, powerful, and professionally proud. They knew the policy, understood the consequences of making an exception, and were willing to hold the line when someone with considerably more positional authority pushed against it.

People can derive genuine professional meaning from exercising judgment under pressure. Recognizing an unusual situation, making a decision, and acting when the rules do not provide an obvious answer is part of good professional work.

But the fact that an employee finds an experience rewarding does not tell us whether the conditions that produced it are healthy for the organization. An employee can be proud of

having held a boundary that leadership has left them to defend, just as an organization can benefit from that employee's actions without addressing why the situation required such an intervention in the first place. The employee may have done exactly the right thing, and the organization still has a problem.

Michael Lipsky's (2010) foundational work on street-level bureaucracy helps explain why professional discretion is necessary. Frontline professionals work amid ambiguity, limited resources, competing demands, and incomplete rules. No organization can anticipate every circumstance, so professionals must exercise judgment in applying broad organizational intentions to particular situations. The problem is not discretion itself. It is what happens when an organization repeatedly relies on individual judgment to compensate for problems it has failed to resolve. An employee who handles an unusual situation well is exercising professional discretion; an organization that depends on the same employee to rescue it from recurring problems has become dependent on heroics.

Organizations can and will reward people for compensating for bad design. The person who repeatedly compensates for structural problems becomes known as "really good with people." The person who can get around a broken process becomes "resourceful." The person who absorbs unreasonable requests without allowing them to become visible problems becomes "a team player." The person who knows how to navigate senior leaders becomes "not afraid to push back."

These may all be accurate descriptions of an employee's abilities, and the organization may have good reason to value those abilities. The organization gets the benefit of someone's exceptional effort, and the person may get the satisfaction and recognition that comes with making things work. And yet, this choice perpetuates unsustainable systems. To be clear: It is a choice.

Over time, exceptional effort becomes an ordinary expectation. The organization continues to function, so the underlying weakness remains unaddressed. The costs may become visible only when the employee can no longer sustain the effort, leaves, or is no longer available to rescue the next situation.

A hero can compensate for a broken system. The problem is not the hero. The problem is organizational dependence on heroics.

What Leadership Owes the People Downstream

If saying no is an exercise of organizational power, then leadership has responsibilities around how that power is distributed.

It is not enough to tell employees to speak up. It is not enough to encourage them to set boundaries or tell them that everyone should feel empowered to push back. If an organization expects people to exercise professional judgment, it has to give them the conditions under which that judgment can be exercised.

Responsibility #1: Make Priorities Explicit

Advancement Services is almost always operating under scarcity. There are more requests than there is time, more data problems than can be fixed immediately, and more research questions than can be answered simultaneously. Someone is going to decide what gets done first.

If leadership does not make those priorities explicit, the organization does not become neutral. The decisions simply migrate downward—to whoever happens to answer the email, manage the queue, own the database, or receive the request. That is not empowerment. It is unmanaged prioritization.

Responsibility #2: Define Decision Rights

Who can approve an exception? Who determines whether a request is urgent? Who decides when a portfolio no longer meets organizational criteria? Who can authorize a departure from a data standard? Who decides that a research request should take priority over other work? These questions sound operational, but they are actually questions about power.

A professional can have responsibility without authority. That is one of the most common organizational traps. We tell someone they are responsible for data quality but give them no authority to reject bad data. We make someone responsible for a research queue but allow anyone senior enough to circumvent it. We hold a portfolio manager accountable for portfolio health but permit exceptions to portfolio criteria without their involvement. That is an incoherent allocation of responsibility.

Power and responsibility should travel together. If you expect a coordinator to enforce a policy, give the coordinator the authority and organizational backing to enforce it. If the coordinator does not have that authority, then the manager needs to own the decision.

Responsibility #3: Create Legitimate Escalation Paths

An escalation path is not a failure of empowerment. It is an acknowledgment that authority is hierarchical and that not every employee possesses the authority to resolve every conflict.

A healthy system allows an employee to say, "This request conflicts with our established process. I don't have authority to make that exception, so I'm escalating it to the person who does." That is very different from asking the employee to figure out how to tell someone more powerful than them that they cannot have what they want.

Hierarchy should not merely determine who gets to ask for things. It should determine who has the authority and the responsibility to resolve the consequences when competing priorities collide.

Responsibility #4: Institutionalize Reasonable Boundaries

Service levels should not depend on whether an individual employee is willing to disappoint someone. Research requests should have an intake mechanism. Data standards should have documented rules and ownership. Portfolio practices should have criteria. Compliance procedures should have defined exceptions and approval authority.

These structures do not eliminate professional judgment. They create the conditions in which professional judgment can be exercised appropriately.

Professional autonomy is also part of the dignity of professional work. Hodson (2001), in his research on dignity at work, identifies autonomy as an important dimension of work because professionals and craft workers possess knowledge necessary to make decisions about how their work should be performed.

For Advancement Services, that means our expertise is not merely in knowing how to complete requests. It is in knowing which requests should be completed, how they should be completed, what standards should govern them, what risks they create, and when the correct answer is that something should not be done at all.

Responsibility #5: Model the Rules.

Workers are not looking to their bosses for moral perfection. Leaders will encounter circumstances in which an exception is appropriate. But when they do, they should own the exception rather than quietly making the standard optional for themselves.

Simons' (2002) concept of behavioral integrity is useful here because employees evaluate the alignment between managers' words and deeds, including the relationship between stated organizational values and enacted behavior. The organization teaches its real priorities through what leaders actually do.

If leadership says that data quality matters, then leadership has to tolerate the inconvenience created by data standards. If leadership says portfolio discipline matters, then leadership has to support the people responsible for enforcing portfolio criteria. If leadership says requests should follow a process, then leadership should use the process.

Otherwise, employees learn something more powerful than the written policy: the rules apply until someone important wants something different.

Responsibility #6: Absorb Conflict Upward

Perhaps most importantly, leadership should absorb conflict upward rather than pushing it downward.

When a senior fundraiser wants an exception from an Advancement Services policy, the least powerful person in the organization should not have to personally negotiate the exception with the most powerful person in the room. If the issue cannot be resolved at the employee's level, it should move upward through the hierarchy until it reaches someone with legitimate authority to decide.

That is what hierarchy is supposed to be for. That is where institutional integrity and vocational dignity meet.

Conclusion

Sometimes professional responsibility requires saying no, even when the person asking has more authority. The research request may not be appropriate. The data may not support the requested conclusion. The portfolio may be too large. The constituent record may not meet the standard. The request may not be urgent. The proposed process may create unacceptable risk. Sometimes no is the professional answer. That does not mean the professional has failed to be helpful. It may mean the professional has done exactly what the organization hired them to do: exercise expertise and judgment on behalf of the institution. There is dignity in being trusted to give an answer that someone does not want to hear.

We should celebrate the employee who holds a boundary, protects a standard, challenges a powerful colleague, or refuses to compromise professional judgment. Courage and professional judgment matter, and organizations need people willing to exercise both. But we should also ask a harder question: why did courage have to be necessary?

A healthy organization does not eliminate judgment, disagreement, ambiguity, or exceptions. It makes professional authority legitimate and usable. It clarifies priorities, defines who gets to decide, provides a path for escalation, supports people who enforce organizational standards, and requires leaders to abide by the systems they establish. Most importantly, it does not make the person with the least power responsible for absorbing the consequences of decisions made by people with more.

There is nothing wrong with the hero. The problem is needing one every time the organization encounters a difficult conversation.

Leadership isn't measured by how many courageous employees an organization has. It's measured by how much courage the organization requires of them, so it makes sense to celebrate the people who hold the line. Then build an organization that doesn't depend on their courage to keep it.

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