

How to Be Delightful

In our hyperconnected, social-media-driven society, your organization needs to be obsessed with making and keeping your customers happy. Your organization needs to be more than efficient; it must be likeable. That's Dave Kerpen's premise in *Likeable Business* (McGraw-Hill).


In his book, Kerpen explores ways to make sure your organization is as delightful as possible to your customers. His lessons apply to your fundraising efforts as well as your relationships with your board members, funders, and partners.

And never forget that your customers include your employees. If they aren't passionate about their work and work together as a team, how can you create amazing experiences for your customers? It really is all about people.

Here are a few of the helpful action items Kerpen includes in his book:

- **Brainstorm and write down five things** you could be doing for your customers that you're not doing today.
- **Hold a meeting with your team.** Have everyone offer one way you can improve the organization. Write the suggestions down. Pick one, and make it happen.
- **Think of three delightful customer service experiences you've had recently.** What do they have in common? Create a plan to implement those elements into your organization.
- **Ask yourself, "What's unnecessary?"** What can we get rid of? How can we make this simpler?"
- **The next time you're about to send a thank-you e-mail to a client, donor, or colleague,** write a thank-you note instead. Put it in the mail.
- **Write down one risk you can take** that would benefit your organization.
- **Ask your customers and employees what their favorite aspect of your organization is.** Then focus on that.
- **Write down one way you can be remarkable** in an interaction with a customer today and one way you can be remarkable in an interaction with a colleague. Then go be remarkable!

The more successful your organization becomes, the harder it is to be nimble enough to react to your changing environment. But as long as you're open to change, your organization will be able to learn, adapt, and succeed.

Adaptability requires you to achieve an overall vision in small bits, constantly pivoting as you go. You build your product or service, you measure results, and you learn from your mistakes or successes. Build, measure, learn, repeat – always making incremental changes along the way. 

New Survey Highlights Nonprofit Threats

A new survey of nonprofit organizations across the U.S. pinpoints some areas of deep concern:

- **Nonprofits may be overlooking potentially disastrous liquidity issues.** Only 11% of nonprofits name liquidity as a top concern, but 53% maintain less than six months of liquid restricted net assets, and 40% have just one to six months of operating reserves.
- **Staffing issues pose a threat.** Retaining qualified staff is the most-cited challenge, named by 72% of respondents.
- **Anti-fraud practices vary.** Only 3% of respondents named fraud as a board concern, and just 9% of organizations maintain a fraud committee.
- **Cyber issues fly under the radar.** Despite high-profile hacks of nonprofits, just 18% of organizations say cybersecurity is one of the top concerns for their board.

Access the full report ("Nonprofit Standards") at bdo.com/nonprofitstandards. Also see these articles at NonprofitWorld.org:

The High Cost of Employee Turnover – and How to Avoid It (Vol. 31, No. 3)


Cybersecurity: Not Just for Home Depot Anymore (Vol. 34, No. 4)

The Bucket System: Managing Your Assets in the Face of Volatility (Vol. 35, No. 2)

Want to Avoid Fraud? Look to Your Board (Vol. 28, No. 5) 

How to Alter People's Behavior

The authors of *Influencer* (vitalsmarts.com) contend that people will do their best to change their behavior if they believe two things:

- **It will be worthwhile** for them to change.
 - **They can do** what is asked of them.
- All you have to do, then, is make sure people believe those two things. Here's how:
- **Pinpoint a few vital behaviors** that will truly make a difference. Focus on changing those.
 - **Connect the vital behaviors to the person's values, pride, and self-interest.** Help them discover links between their current behavior and what they really want.
 - **Use stories to show why change is important** and how proud and happy people will feel when they make the necessary adjustments.
 - **Figure out any missing skills people think they'll need.** Break those skills into learnable parts. Provide step-by-step instructions and positive examples.
 - **Give people immediate feedback by a coach** as they practice their new skills.
 - **Connect the newly acquired skills** to people's sense of who they want to be. 

Six Provocative Insights from International Fundraising Conference

International speakers on the cutting edge of fundraising shared success secrets at the AFP Congress in Toronto (afptoronto.org/congress/sessions). Here are a few, as summarized by Gail Perry (firedupfundraising.com). “You may think you’ve heard some of these ideas before,” she says, “but think again – and apply them to your board, your own leadership skill development, and your messaging.”

1. Focus more on the few people who love you. They’ll convert better. And they’ll give you a higher gift, said Shanelle Newton Clapham, MA, founder of *Parachute Digital* in Australia. **Takeaway:** This is the new funding motto. It goes for major gifts, mid-level gifts and now, digital donors.

2. The aim of a brochure is to create something that people might keep and cherish, noted Derek Humphries, of the DTV Group in The Netherlands. **Takeaway:** If you’re creating print materials, make them memorable. Do your materials stand up to this test?

3. Your case for support needs to read like an investment prospectus, Bill Bartolini, ACFRE, Senior Philanthropic Advisor, Wexner Medical Center, said. “When writing to donors, see if you can encapsulate what you do in one sentence.” **Takeaway:** Is it time to go back to the drawing board with your case? Maybe so.

4. Your event sponsors want exclusivity and differentiation. Bernie Colterman, Centre of Excellence for Public Sector Marketing, said to trash the traditional levels of sponsorship. Instead offer specific and separate benefits to each sponsor. **Takeaway:** You can raise a ton more sponsorship dollars by offering exclusivity for each benefit. It’s time to turn your current efforts upside down!

5. Your fundraising auction is a sale of “stuff,” but your “fund a need” appeal is a gift from the heart – and that’s the crucial piece. Layne, The Auctionista, BAS, reminded us to play up the need being funded, not the tangible goods, throughout the auction. Do it with theatrics: Keep a client up there on the platform with the auctioneer. **Takeaway:** The most important thing at your gala is the “fund a need.” Make it emotional and powerful.

6. Surveys are unbelievably powerful in planned giving because donors want to talk about themselves. David Love, CFRE of Agents of Good, urged us to ask donors. “What do you think about the work we do?” You’ll probably get back pages of handwritten information from your donors about their love for your work. **Takeaway:** Every donor has a story. People want to tell their stories, and others want to hear them. Ask for these stories, collect them, and use them in future appeals. It’s one of the most transformative things you can do.

You can find more details on these and other fundraising strategies at NonprofitWorld.org. For example, see:

Top 10 Trends: How Major Donors Are Changing & What to Do about It (Vol. 31, No. 4)

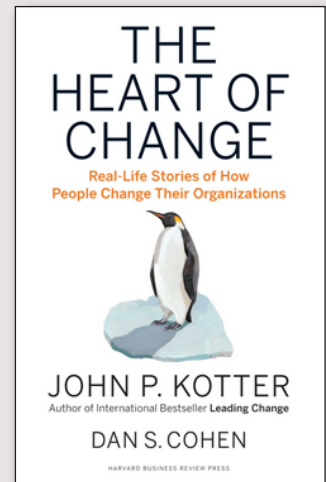
Boost Your Share of Corporate Sponsorships (Vol. 29, No. 4)

Improve Your Special Events (Vol. 30, No. 5)

Surveys Provide Crucial Feedback (Vol. 22, No. 5) 

The Eight Steps of Successful Change

How do organizations create large-scale change? Using lessons learned from interviews with hundreds of people, John Kotter and Dan Cohen detail keys to success in *The Heart of Change* (Harvard Business School Press, hbsp.harvard.edu). Their research shows that the most successful change leaders follow this sequence of steps:



1. Create a sense of urgency among relevant people. Banish complacency, fear, and anger, all of which will undermine change.

2. Build a guiding team. It’s vital to pull together a team of people with the credibility, connections, and authority needed to provide change leadership. Less successful organizations often try to rely on one person to produce change. That’s a fatal mistake. What’s needed is a strong team with the right skills, stature, and power to do the job.

3. Get the vision right. Successful organizations create clear, simple, uplifting visions. Less successful ones focus only on detailed plans and budgets which don’t inspire people to change.

4. Communicate for buy-in. Even the smartest people are prone to undervaluing the need for communicating a simple message over and over. Repetition is key to making sure people understand and accept the message.

5. Empower action. Remove barriers that keep people from acting on the vision.


6. Create short-term wins. Carefully select your first projects so there are enough quick successes to provide credibility and momentum.

7. Don’t let up. After the first wins, keep the momentum building slowly and surely. Don’t try to do too much at once, and don’t let momentum slip.

8. Make change stick. Create and nurture a new culture. Organizational cultures – group norms of behaviors and shared values – take time to build, but no change will endure without a culture to support it.

For more on leading successful change, see NonprofitWorld.org:

How to Change the World by Changing Your Culture (Vol. 31, No. 2)


The Best Leaders Are Change Agents (Vol. 34, No. 1) 

Ways to Make Fundraising Sustainable

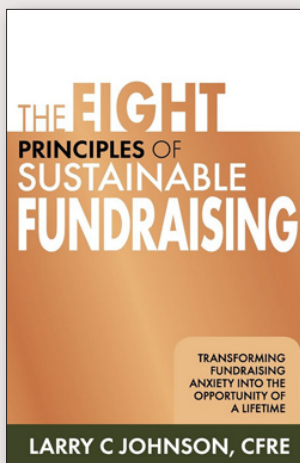
Most nonprofits scramble constantly for funding because they do it through transactional exchanges, viewing donors as consumers rather than partners. Relationship-building is often lost to the “how” of fundraising and the short-term use of money as the only measure of success.

Larry Johnson, in *The Eight Principles of Sustainable Fundraising* (AlohaPublishing.com), investigates the “why” of fundraising and argues for sustainability as a measure of success in fund development. He identifies eight practices to make fundraising sustainable:

1. **View the world through donors’ eyes** so that you can truly engage them rather than try to entice them.
2. **Know what you want to accomplish**, and frame that knowledge within the donor’s worldview.
3. **Earn people’s trust** by assuring that leaders’ actions match their words.
4. **Find donors whose values fit with your mission**, and, through careful planning, form relationships with them.
5. **Build financial support first among those** with the closest relationship to your organization. Work from the inside out, creating concentric circles of support.
6. **Move donors along the relationship path** with your organization purposefully and consistently but at their own pace. Coordinate your efforts as you acquire new donors, retain them at the highest possible rate, and reach out to new investors.
7. **Continually renew your donors** and move them toward truly commensurate giving.
8. **Invest time and money** in the fundraising program, integrate it into the organization as a whole, and evaluate it in terms of long-term relationships, not short-term cash.

When you execute these policies consistently, you’ll build a fundraising program that deepens relationships and grows over time. This lucid, straightforward book shows how to do it, step by step. 

— reviewed by Terrence Fernsler




Why Nonprofits Must Work toward a Sustainable Economy

“The rich get richer, and the poor get poorer.”

The “poor” aren’t getting poorer in absolute terms, but they are being left behind. In *Unchecked Corporate Power* (routledge.com), Gregg Barak explains how corporate greed widens the relative wealth between corporations and the rest of us. Those not benefitting from the widening economic gap, including most nonprofit organizations and their constituents, are increasingly exploited by multinational corporations.

The exploitation means we and our constituents pay a greater share of taxes and suffer the consequences of fraud, contract abrogations, and environmental damage. This leads ultimately to economic collapse.

The free market has come to mean enabling the crimes of globalized corporations, accompanied by securitization that erodes the functionality of representative democracy. Whistleblowers find themselves criminalized rather than protected. Vast numbers of people are demeaned with post-secondary education debt and reduced access to the commons — such as primary and secondary education, fire and public safety, public records, and safe air and water.


The almost-religious dependence on growth economics must be converted to a sustainability mindset. Barak offers alternatives, beginning with acknowledging the flaws of economic growth. Resolutions won’t come easily; there are many comfortable people who, although they don’t benefit directly from rampant multinational criminality, will act on loss aversion. But the growing disparity between those who are able to get away with exploitation and those who bear its costs means that nonprofit organizations must work to mitigate rampant corporate capitalism if they want to serve their customers effectively. 

—reviewed by Terrence Fernsler

How to Expand Your Talent Pool

Over 65 million people now work as freelancers or consultants rather than full-time employees. That means you need to revise your notions of how and who to hire. The good news is that this new on-demand talent will help you achieve the biggest impact on projects in the fastest time possible.

In *Navigating the Talent Shift*, Lisa Hufford (lisahufford.com) explains how to tap into this broader, more accessible workforce. For example:


- **Use programs such as Evernote and OneNote** to keep a list of names as you expand your network, organized by expertise, within reach at any time. Even if someone in your immediate network doesn’t know anyone with the special talent you’re seeking, they most likely know someone who does.
- **Do a LinkedIn search** using the “Advanced Search” feature, typing in “consultant” (or more specifically, “digital marketing consultant”) in the keyword field.
- **Widen your talent pool with freelance marketplaces and platforms** such as Authentic Jobs (authenticjobs.com), Working Nomads (workingnomads.co/jobs), or Coroflot (coroflot.com). For more options, go to lisahufford.com/resources. 

What Trends Will Shape the Nonprofit World in 2018?

In “Blueprint 2018,” Stanford PACS scholar Lucy Bernholz explores the big ideas that will affect nonprofits in the coming year (Blueprint 2018-1.pdf). Here’s a summary:

- **People will become more and more concerned** about how their personal information is collected and used by nonprofit organizations. Nonprofits will need to provide ways for donors to maintain personal control over their digital data. If not well managed, people’s data can become a toxic asset.
- **New platforms and networks** will involve a dynamic mix of forms working in almost every sector. Platforms such as MiVote and Win the Future are philanthropically supported. Crowdpac is venture-capital funded. OPEN (a nonprofit network) connects civic and political membership platforms in more than a dozen countries. Color of Change (and many other such networks) brings organizing skills, advocacy expertise, coalition building, and social media to bear to change public policy and corporate behavior. Crowdfunding systems (many commercially owned) move money to anyone and have at least partially powered many of these efforts.
- **Consulting firms** dedicated to getting social-justice-oriented political candidates elected will be developing podcasting strategies to circumvent media and political party gatekeepers.
- **Governments** world-wide demanding that companies take responsibility for enforcing the law will be turning to nonprofits to help patrol these systems and enforce their rules.

ITData (itdata.com) adds these trends to the list:

- **Mobile devices and apps** are becoming more important in terms of fundraising and information distribution. Receiving actual bank checks is becoming obsolete.
- **The nonprofit motivation message is changing** to communicate investment to make things happen instead of simply providing donations. Embracing the concept of investment requires better information and analytics for donors and management to make more informed decisions.
- **Digital marketing** will need to become more sophisticated as it becomes a primary storyteller and revenue producer over conventional media.
- **More nonprofits are committing resources to cybersecurity** as they strive to protect donor lists, donor engagement, privacy issues, and other threats.
- **The industry is revisiting its definition of overhead** and its often negative effect on performance ratings. In other words, some previously categorized overhead items such as IT and digital advertising are becoming viewed as a strategic investment rather than an expense. 

Why You Can Stop Worrying about the New Tax Law

Writers in the media have been fretting about how the new tax law will hurt nonprofits. “Don’t listen to naysayers and doomsday prognosticators,” says Greg Warner of MarketSmart (info@marketsmart.com). He notes that charitable giving has mirrored the GDP for over 40 years. If the tax law increases GDP, nonprofits will benefit. “And, besides, people give because it makes them feel good! It ain’t about the tax write-offs,” he says.

“Your job: Make people feel good! Provide value. Find out why they care and what interests them. Then, market to them in a highly personalized, relevant fashion that elicits emotion,” he urges.


“Do that and you’ll be just fine.” 

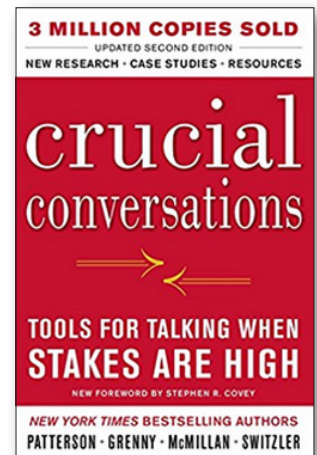
Tools for Talking when Stakes Are High

Might your organization’s success hang on something as simple as how you handle crucial conversations?

Research suggests the answer is yes.

When stakes are high and emotions run strong, conversations become crucial, as the authors of *Crucial Conversations* (McGraw-Hill, mcgraw-hill.com) explain. At moments that shape your future, these suggestions will help you make good decisions:

- **Get all relevant information** into the open.
- **Have everyone in the conversation commit to continuing the dialogue** till you come up with something that serves everyone involved.
- **Make it safe for people to add their input**, no matter how controversial it may seem.
- **Clarify what everyone really wants – which may be quite different** from what you thought you were discussing.
- **Build on everyone’s input to establish a pool of shared meaning** – a place of agreement and mutual purpose. If there is no agreement, you may need to move to more encompassing goals.
- **Explore possible choices.** Avoid either-or or win-lose choices. Look for the “and” – a way to accomplish this *and* that rather than this *or* that.
- **Turn your conversation into action** by writing out who will do what by when. Set a follow-up time. Make the deliverables clear. Hold people accountable for their promises. 



How Can You Appreciate Your Workers? Let Us Count the Ways

If you want people to do their best work over the long haul, you need to show them how much you appreciate what they do. The recognition dinner, the coffee mug, the certificate – these may motivate some. But each person has a primary “language of appreciation,” as Gary Chapman and Paul White explain in *The Five Languages of Appreciation in the Workplace* (appreciationatwork.com):

Appreciation Language #1: Words of Affirmation. Praise for a job well done can be highly motivating, as long as it’s sincere and heart-felt.


Appreciation Language #2: Quality Time. Give someone your focused attention. Suggest a one-on-one lunch, or stop by someone’s desk for a conversation, and take time to listen.

Appreciation Language #3: Acts of Service. Offer to help out. Perhaps pitch in to help people complete a project, help their computer work more efficiently, or bring your team some food when they’re working long hours.

Appreciation Language #4: Tangible Gifts. The key here is to find something meaningful to give. It doesn’t have to be a “thing.” It might be tickets to a sporting event, gift cards to restaurants, or certificates to a spa. And don’t forget chocolate! (For more ideas, see “The Art of Giving a Gift without Buying a ‘Thing’” at appreciationatwork.com/learn.)

Appreciation Language #5: Physical Touch. Yes, there’s a limited number of situations involving touch that are appropriate in work settings. But many moments are enhanced with a handshake, high five, pat on the back, hand on the shoulder, or friendly hug. If someone stiffens at a touch, you know that physical touch won’t be received as appreciation, and you can move on to other languages.

It takes far less time and energy once you know what will encourage each person, versus putting on large appreciation events that miss the mark for many people.

Research shows that public recognition is one of the least favorite forms of receiving appreciation. Don’t make the mistake of using such events as your only mode of motivation. Although most people will accept appreciation in all five languages, they won’t feel truly encouraged unless the message is communicated through their primary language. 



Human Resources in Nonprofits: It’s a Different Story

Motivation of staff in most nonprofit organizations is different than in for-profit organizations or public agencies. Compensation rate is important in nonprofits, of course, but other factors take on greater value than in other sectors. That’s why it’s good to see books like *Managing Human Resources for Nonprofits* (Taylor and Francis, taylorandfrancis.com) that deal specifically with human resource management in nonprofits.

Author Kunle Akingbola explains how to attract new talent, develop effective teams, and measure performance in the most meaningful way. Because volunteers are critical to many nonprofit organizations, they’re included as part of nonprofit staff.

This book is useful to nonprofit managers who aren’t human resource specialists, because Akingbola doesn’t assume prior knowledge of strategic human resource management practices. Written in plain English, not human resource or industry jargon, it’s a handy tool for anyone supervising paid or volunteer staff in a nonprofit organization.

—reviewed by Terrence Fernsler

Create an Organization of Intrapreneurs

Building an innovative, cutting-edge organization will be much easier if you:

- **Invest in hiring** “intrapreneurs” (people with an eye for solving problems and coming up with new ideas within the walls of an existing organization).

- **Develop a culture** in which intrapreneurs will thrive.

IGNITE: Setting Your Organization’s Culture on Fire with Innovation (theignitebook.com) offers details on finding intrapreneurs, including the following:

- **Seek “wanderers” and “strategic scanners.”** Such people love nothing better than to attend conferences – and not only in their own field. They know that’s where they can scan the horizon for the most innovative ideas about what’s coming next. When you interview, ask job candidates about the last three conferences they attended and what they learned. Look for passion, for an intense interest in soaking up as much knowledge as possible.

- **Test visual thinking.** Ask job candidates to “map out” an idea they turned into reality at their last job. An intrapreneur will naturally look around for a pen or find some other way to show, not just tell. They thrive on visual thinking, which is a great barometer of a creative mind.

- **Look for the ability to pivot.** Ask about a time something didn’t work out for the job candidates. What did they do next? Look for answers that show that candidates can make quick shifts from current directions.

Once you’ve hired intrapreneurs, be sure to provide a supporting structure for them. Send them to conferences, and give them time to brainstorm. Have a process that makes it easy for them to submit and try out new ideas. Celebrate successes. Study and learn from failures. Create an environment in which your employee intrapreneurs can shine. 