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Nonprofit World

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When It's Time to Press the Reset Key

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- How to Find Yourself in a Busy World
- Five Fundraising Mistakes We Make with Our Boards
- Yes, You CAN Balance Work and Family Roles
- iPads in the Board Room: Efficiency-Booster or Time-Waster?
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FEATURE STORY

When what you do isn't working, it may be time to start all over from scratch. Just as when your computer refuses to obey, hit the "Reset" button. Paul Lemberg suggests ways to open up the creative part of your brain and discover new possibilities: See his insightful, inspiring article on page 14. Then come back to your problems with new vigor.

ARTICLES

DEPARTMENTS

Unsolicited manuscripts and letters to the editor are welcomed. They should be addressed to **Jill Muehrcke, Editor,** ***Nonprofit World*** **P.O. Box 44173, Madison, WI 53744-4173 or muehrcke@charter.net or Jill@NonprofitWorld.org.**

Find Yourself in a Busy World

In the past few years, a surprising new tool has become popular beyond anyone's imagining. Actually, it's an old tool that people are rediscovering — the hand-held notebook.

In *Hamlet's BlackBerry: A Practical Philosophy for Building a Good Life in the Digital Age,* William Powers describes how his life changed when he bought his first Moleskine, a small notebook with an elastic band to keep it closed, patterned after those used in 19th-century Europe. He instantly fell in love with it, slipped it into his back pocket, and has had one there ever since.

In an age of digital distraction, Power says, jotting things down by hand can organize your thoughts and ground you in a way that's hard to duplicate when you're switching from screen to screen on your computer. The notebook takes over those navigational duties, freeing your mind to think.

"Hamlet's BlackBerry" is Power's term for the writing tablet that was an innovation in Shakespeare's time. Just like today, people felt burdened by an explosion of information, leading Hamlet to despair of "this distracted globe" — referring both to the world and to his own head. His solution — to write things down on paper to clear his mind of clutter — is still one of the best ways to bring a plethora of data under control.

While a couple sheets of paper folded into your pocket or purse (my usual habit) also works, the Moleskine has more personality and isn't as likely to be misplaced. Its soaring personality reflects a curious phenomenon: While a few years ago, the object was to connect with as many people as possible, now we're realizing the need to disconnect and take back our lives. "Practical Ways to Unplug Yourself and Your Workplace" (page 26) notes concrete things you can do to mitigate today's overwhelming connectedness.

"Boon or Curse? It's Up to Us" on page 28 explores how technology can enhance social cohesion but also, if misused, can isolate and divide us. On page 5, Chris Croll highlights the need to know the risks as well as the rewards of social media like LinkedIn. In "iPads in the Board Room: Efficiency-Booster or Time-Waster?" (page 8), Dottie Schindlinger weighs the pros and cons of iPads and similar gadgets.

True connection takes place away from your screens and technological devices. You find it when you interact in person, listening to what others say without wondering, in the back of your mind, when your cell phone is going to alert you to a new message. You discover it through building long-term relationships, as Eugene Fram points out in "Board-Staff Relationships: An Uncomfortable Partnership?" (page 3). You reveal it when you connect people with your mission in powerful new ways ("The Key to Sustainability: Mission-Based Fundraising," page 25) and when you take time to smile and laugh with the people around you ("Laughing Together," page 27).

What we crave is deep engagement, as described in *The Act of Convening: Authentic Engagement in Meetings, Gatherings, and Conversations.* (Turn to page 24 for a review of this incisive book.)

> "Shakespeare tells us the secret."

Authentic gatherings not only connect you more closely with others; they also put you in touch with your deepest self. Again, Shakespeare tells us the secret: To your own self be true. To collaborate with others in creating something new, you must be open and honest, sharing who you are at your core. (See "Core Elements of Authentic Engagement" on page 24.)

Part of becoming the leader of your own life involves understanding work-life boundaries. "Yes, You CAN Balance Work and Family Roles" (page 16) offers advice on taking control of all the many roles you play.

To shake yourself and your organization loose from the chains of your bottomless inbox, you may have to press your own reset button, as Paul Lemberg puts it in "Control-Alt-Delete: When It's Time to Press the Reset Key" (page 14). That means clearing your mind, wiping the slate clean, writing on a new sheet of paper, Lemberg explains.

He provides suggestions for how to do so in "A Few Ways to Stimulate Your Mind" on page 15. As you may notice, none of these ideas involves sitting down at your computer.

Jill Muehrcke
Jill@NonprofitWorld.org

Five Things to Do Next Monday

Here are a few concrete things you can do right now to begin transforming your organization.

1. **Ask board members to read the articles on pages 3 and 4.** At the next board meeting, have them pinpoint ideas they like and actions to implement.
2. **Decide on the best ways** to use LinkedIn for your organization's benefit (page 5).
3. **Write down a problem you're wrestling with.** Then use one of the tactics on page 15 to come up with a solution.
4. **Start a fundraising committee (or improve the one you have)** with the pointers on pages 6-7.
5. **Make sure you, your fundraisers, and all your financial, accounting, and legal staff know the rules** delineated in "Don't Alienate Donors by Giving Them Improper Receipts" (page 19).

Board-Staff Relationships: An Uncomfortable Partnership?

Are staff and board members doomed to be uncomfortable with each other? Here's how the board can take the lead in forging a productive relationship.

By Eugene Fram

I've always believed nonprofit board members don't give sufficient consideration to the relationships between the board and staff. As Ellen Cunniffe notes in *Nonprofit Quarterly*, those responsible for the organization's oversight aren't the people who show up each day to do the work, complicating the relationship on both sides ("When a Board Seat Becomes Uncomfortable," www.nonprofitquarterly.org/governancevoice/22635-when-a-board-seat-becomes-uncomfortable.html). That problem is intensified in small to mid-sized nonprofits, where the lines between governance and management are more easily blurred.

Since board and staff are both vital parts in the nonprofit partnership engine, it's critical that the parts be well oiled so that the organization may smoothly move forward in meeting its mission. Here are a few things board members can do:

- **Respect and celebrate staff accomplishments,** both individually and as a group.
- **Meet with staff in small groups** and on appropriate problem-solving committee assignments.
- **Develop interest and understanding of the work the organization's employees do** and the challenges they face.
- **Encourage staff to provide brief informational updates** at board meetings or online.
- **As much as possible, try to develop a collegial, not authoritarian, relationship** with staff. They're well aware that the board has final authority.
- **As suggested by Sarbanes-Oxley, establish a board procedure** that encourages board members, on occasion, to interact with key employees below the management level.
- **Be sensitive to staff sensitivities and concerns,** such as whether board-mandated changes will interfere with the organization's collegiality and sense of caring. Show the staff that you have a robust understanding of the challenges they face daily and that you share their passion for the organization's mission.

Do your staff and board work together in harmony or in an uncomfortable or mistrusting manner? Take a moment to assess and, if necessary, take time to tune up the partnership. Your nonprofit will be the beneficiary!

Eugene Fram, Ed.D. (frameugene@gmail.com, blog site: http://bit.ly/yfRZpz), is professor emeritus at the Saunders College of Business, Rochester Institute of Technology. In 2008, Fram was awarded the university's Presidential Medallion for Outstanding Service. In 2012, a former student gifted Rochester Institute of Technology $3 million to establish the Eugene H. Fram Chair in Applied Critical Thinking. Fram's book Policy vs. Paper Clips *(available in new edition at http://amzn.to/eu7nQl) has been used by thousands of nonprofits to model their board structures.*

Stay in Tune

Bring board and staff into accord with these articles at www.NonprofitWorld.org/members:

Boards Can't Go It Alone: Forging the Board-Executive Partnership (Vol. 14, No. 2)

The Board-Savvy CEO (Vol. 26, No. 2)

Building a Strong Board-Exec Relationship (Vol. 21, No. 4)

How to Assess and Improve Your Board's Performance (Vol. 24, No. 1)

Board and Staff Consensus: A Powerful Fundraising Tool (Vol. 15, No. 1)

Eight Questions Every Board Member Needs to Answer (Vol. 22, No. 3)

The Sarbanes-Oxley Act & Nonprofits: But I Thought That Didn't Apply to Us (Vol. 22, No. 5)

How to Create a Strong Board-CEO Partnership (Vol. 27, No. 1)

Seven Creative Ways to Energize Your Board (Vol. 16, No. 3)

A Board Member Self-Assessment (Vol. 15, No. 6)

35 Questions that Will Transform Your Board (Vol. 24, No. 3)

Building a Rock-Solid Board-CEO Partnership: Talking With CEO Virginia Jacko (Vol. 27, No. 3)

Also see Learning Institute programs on-line: Board Governance (www.NonprofitWorld.org./LearningInstitute).

Does Your Board Need to Get Out More? Should your board focus on your organization or spend time working outside the board room?

Q I'm involved with the United Way in my community. Lately I've noticed a focus on the board "looking outward." A friend of mine is on another board, and she is hearing that the board needs to spend more time working outside the board room. I always thought that as directors our major focus should be on fiduciary oversight. Can you explain why we're hearing something different all of a sudden?

A The United Way has long been in the forefront when it comes to introducing good governance practice to a community. What you describe really isn't so new, but often it takes a while for proven practices to work their way throughout communities.

Allow me to provide a little history. Back in 2004, Dick Chait, Bill Ryan, and Barbara Taylor — all associated with the Hauser Center for Nonprofits at Harvard University — wrote *Governance as Leadership: Reframing the Work of Nonprofit Boards* (John Wiley & Sons), in which they suggested boards have three responsibilities. One, obviously, is the fiduciary oversight you mention. The other two are strategic and generative thinking.

As you might guess, strategic thinking is looking at issues, plans, and decisions with a big-picture, future orientation. Generative thinking is making sense of cues from the community, looking at them in relationship to past experiences, and reframing them for the future. How can any director interpret cues without being out in the community, listening to stakeholders, and judging the organization's impact (or lack of impact) on the people it serves?

The process of interacting with stakeholders and looking at impact beyond the numbers is what Chait, Ryan, and Taylor call "working at the boundary" and Richard Harwood (upon whose work the United Way has modeled its approach) calls "looking outward." Simply, it builds on the recognition that our directors can be extremely valuable outside the board room, impassioning others, mustering resources, increasing access to diverse talent, and using what they learn to help inform decisions.

> "At the very least, your board chair should have a blog."

There are many techniques you can use to help board members make that shift beyond the boardroom. I'll share just a few here:

- **Set aside 15-20 minutes at each board meeting.** Have directors share what they've learned in their day-to-day interactions that might prove an opportunity for — or threat to — your organization and your clients. Such reporting opens the door to a cost-benefit analysis to ensure that the organization remains responsive to community needs.
- **Ask that directors develop ongoing relationships with media and legislative personnel who share an interest in your organization's mission.** The key here is "ongoing." The idea is to create true relationships, based on give and take. Offer statistics, quotes, and access to expert sources that board members can use in building these relationships.
- **Use social media to encourage people in the community to connect with your board members.** At the very least, your board chair should have a blog and solicit feedback from blog readers. This is a great way to hear how the community feels about what you're doing.
- **Encourage all board members to set up Google alerts (google.com/alerts) related to your mission.** Such alerts are an excellent way for them to keep up with critical issues, developments, and statistics.
- **Have directors conduct mission-based tours of your organization for the community (as appropriate) and ask for questions as well as comments.** The insights gathered will be very valuable when doing planning.
- **Suggest that board members meet with colleagues on other boards** with similar or complementary missions to exchange information.

What's exciting about "working at the boundaries" and "looking out" is that directors are no longer focused solely on their own organization or the relatively limited impact it can make on its clients. Rather, they become central players in affecting the larger community. They see that they're truly making a difference, and they become more engaged than ever before. It's a true win for everyone involved.

Terrie Temkin, Ph.D., Founding Principal
CoreStrategies for Nonprofits, Inc.
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Benefits & Risks for Nonprofit Leaders Using LinkedIn

LinkedIn can be a powerful tool. Understanding its culture is critical to success.

By Chris Croll

First, the good news. LinkedIn is a valuable social media channel for nonprofit leaders. You can use it to network with other professionals, recruit volunteers, and communicate with donors and other key audience members. But there are risks you should understand before you jump in.

> "LinkedIn is a very different venue from Facebook or Twitter."

Here are some of the benefits:

Collaborate with other nonprofits. According to LinkedIn, there are over 87,000 groups focused on nonprofit issues. This means you have access to thousands of people who are facing many of the same issues you face each day. For instance, in the "Volunteer Coordinators" group, one member posted the question, "What database do you use for volunteer management?" Hearing people's responses is a quick way to validate your own choice or learn about other options that may work better for you. There's nothing more helpful than learning the experiences of those who've "been there," just like you.

To post your own questions, select "Groups" from the dropdown search box (the default is "People") and search by topic for whatever you're researching. Once you find the appropriate group, post your question. Don't be surprised by the helpful and courteous responses you receive! Because LinkedIn is used primarily by the business community, there's a higher level of integrity and responsiveness than there would be in a social network used primarily for entertainment purposes.

Create private work groups. Many nonprofits manage "closed" groups on LinkedIn that require "Administrator" approval before members can access the group. Closed groups are great for collaboration and communication amongst a pre-screened list of members.

The group "Compass Volunteer Network," for example, is composed of MBA alumni from Harvard, Stanford, Wharton, Dartmouth, and the University of Chicago. This group provides pro-bono business consulting to nonprofit organizations in the greater DC area. Only alumni from those institutions are permitted to join the group. This keeps the group's membership laser-focused on the mission.

Network. The reason most people take the time to fill out profiles on LinkedIn is because they're interested in networking. LinkedIn is like a trade show, a cocktail party, and a job fair rolled into one! Looking for a new job? Search the job listings or enter a specific organization in the search box. Want to recruit volunteers? Do a key word search for terms like "mentoring" or "youth services" to get access to thousands of people who have included those terms in their profiles. Some nonprofits even use LinkedIn to recruit new board members.

Now that you're using LinkedIn to help manage your organization, be aware that there are risks. These dangers stem from not understanding the "culture" and expectations of the site's millions of users.

Risk #1 — Not thanking someone for help. If you post a question in a group or someone otherwise assists you on LinkedIn, remember to thank them — publicly — for their assistance. In our haste to get an answer and move on, we sometimes forget that it's people—not search engines — who are taking the time to help us out on LinkedIn. Take that extra second to say "thank you."

Risk #2 — Forgetting you're on stage when you update your status. When you post a status update on LinkedIn, you're essentially broadcasting to all the contacts in your professional network. Your reputation can be compromised in an instant if you post something too controversial, personal, or irrelevant.

LinkedIn is a very different venue from Facebook or Twitter where opinions, stories, and hour-to-hour happenings are acceptable as status updates. LinkedIn is about work. Most of your connections are too busy to be bothered with overly trivial or personal updates.

Chris Croll (chris@crollventures.com) advises nonprofits and for-profits on how to use social media to advance their missions and objectives. This article is adapted with permission from the Nonprofit Risk Management Center's Web site (nonprofitrisk.org, 202-785-3891).

Exploring Social Media

Learn more with these articles at NonprofitWorld.org/members:

- **Using Social Media to Advance Your Goals** (Vol. 27, No. 1)
- **Is It Time to Consider New Ways to Communicate?** (Vol. 25, No. 4)
- **Don't Take Risks with Social Media** (Vol. 29, No. 1)
- **How to Make Social-Media Fundraising Work for You** (Vol. 27, No. 2)
- **Accelerating Fundraising through Social Media** (Vol. 28, No. 3)
- **Using Web 2.0 Technologies to Connect with New Supporters** (Vol. 27, No. 4)
- **Legal Advice on Using the New Media** (Vol. 28, No. 6)

Tips for a Successful Fundraising Committee

Do you need to create a committee to help you raise funds? Or should you revamp the committee you have? These suggestions will pave the way.

By Emily Davis

It's crucial for your organization to have an effective fundraising committee. Such a committee can do far more than help you raise funds. It can hold an essential place in spreading your mission to valuable supporters and networks. Below are some ways to organize a team of volunteer fundraisers for your organization.

1. **Have a committee description.** How can volunteers know what you need them to do without instruction? Be sure your description includes details such as committee activities, meeting times and length, preferred skills and qualifications, and any other logistics you would want to know if you were joining the committee.
2. **Be clear about your committee name.** The words "fundraising" and "committee" can scare some people away. Another option is to call your committee the "resource development team." It sends a slightly different message — that this is a team of leaders who are leveraging not just dollars but resources of all kinds for the mission and cause.
3. **Identify board leadership.** One of the best practices in nonprofit leadership is to make sure all committees are led by active board members. Board members serve as ambassadors for your organization — both with internal and external networks. Having a dedicated board member lead your fundraising committee will help assure smooth communication and follow-through.
4. **Share your fundraising plan.** Every organization should have a plan for developing its resources. Share that plan with your fundraising committee members and ask them to provide feedback as well as take on specific projects. Once every year, ask the committee to help you review the plan and find out what worked well, which goals need to be amended, and what isn't realistic.
5. **Provide staff support.** Don't expect to create a fundraising committee and have the members magically begin raising millions of dollars. Very few people are fundraising experts. Your staff will be the key to committee members' success in many ways. Your employees are on the ground and working with stakeholders every day. Create opportunities for them to share and support the committee's efforts. Train your staff how to lead, not just manage, the committee. Leaders breed leaders — this is a great opportunity for staff members to support and engage volunteers in a leadership capacity.

> "Very few people are fundraising experts."

6. **Offer trainings.** Provide your committee with in-service trainings or share regular training opportunities through other organizations, such as your local nonprofit association. Investing small amounts of money in trainings can have a great return on investment in terms of fundraising from your committee members. It also shows you value your committee members and appreciate their work.
7. **Set the bar high.** Having high standards and expecting committee members to live up to their commitments will set your committee apart from others. You may have a small committee to begin with, but know that you'll slowly develop a strong team of fundraisers, strongly committed to your mission.
8. **Debrief fundraising activities.** Carefully review all fundraising activities immediately upon completion. You probably already do this for fundraising events, and that's important. But be certain you're doing the same thing for all projects, such as holding annual appeals, sending out direct mail, and researching fundraising databases. Keep a running list of what tasks must be completed and what needs to be improved. Such a list will help keep organizational memory alive even if staff and volunteers change.
9. **Celebrate successes.** When an individual has a great success or your committee is part of an organizational success, celebrate. Host a lunch, have a cook-out, give a small, meaningful gift, write a thank-you note. Feeling appreciated is a big reason why people keep up with their volunteer work. If they don't feel appreciated by your organization, they can easily share their time with another organization instead.
10. **Create accountability.** Keep track of committee meeting and event attendance. If committee members aren't honoring their commitments, meet with them face-to-face. Show compassion, and listen more than you speak. Find out why they're unable to follow through and how you can help.

11. **Recruit people with a willingness to learn and collaborate.** Volunteers interested in learning new skills and becoming great team members are often more valuable than those who write big checks. Helping people grow and improve can evolve into creating lifelong supporters, ambassadors, and leaders.

12. **Regard your committee as a pipeline.** Committees are a great way to identify individuals who could be perfect for your board. Committee membership gives both you and the volunteer a chance to "try on" the fit. It's a little bit like dating: Go on a few dates before making a long-term commitment.

Emily Davis, MNM (emily@emilydavisconsulting.com), is president of Emily Davis and Associates Consulting (emilydavisconsulting.com); author of Fundraising and the Next Generation*; 21/64 family philanthropy consultant; & BoardSource governance trainer. She provides consulting, workshops, and facilitation to nonprofit and philanthropist leaders in board governance, communications, and philanthropy. Emily serves in advisory roles for Nonprofit Cultivation Center and Social Venture Partners of Boulder County. She has received & been nominated for a number of awards throughout the country and blogs regularly at emilydavisconsulting.com/blog*

Commit to Resource Development

WEB SITES

Check out the following resources specific to fundraising committees and their operations, including sample committee descriptions.

IdeaEncore.org

afpnet.org

fundraising.alltop.com

ARTICLES

For more on effective fundraising, see these articles at NonprofitWorld.org/members:

Five Strategies to Enhance Your Fundraising (Vol. 27, No. 2)

Deeper Donor Relationships = Increased Contributions (Vol. 26, No. 4)

How Your Board Members Can Raise Funds without Asking for a Dime (Vol. 19, No. 6)

Training Programs Need More than Good Information (Vol. 21, No. 2)

How to Measure Fundraising Success (Vol. 31, No. 2)

Raising Funds in an Uncertain Economy (Vol. 27, No. 2)

Board and Staff Consensus: A Powerful Fundraising Tool (Vol. 15, No. 1)

Also see Learning Institute programs on-line: Resource Development and O for Opportunity: Exploring New Revenue Opportunities for Nonprofits (NonprofitWorld.org/LearningInstitute).

CREATIVE FUNDRAISING IDEAS

Watch for Restaurant Openings

Newly opened restaurants want extra publicity. You want extra revenue. These are two good reasons to create a partnership.

When you learn a new restaurant is coming to town (realtors, developers, and Chamber of Commerce staff make good contacts for this insider information), be the first to make contact and explore a fundraiser for your organization. Be sure to stress the benefits the restaurant will receive from such a collaboration.

For other creative fundraising ideas, see *Special Events Galore*, published by Stevenson, Inc. (stevensoninc.com).

Fill Empty Bowls

Ask students, church groups, and community potters to create and donate soup bowls for an "empty bowl" event. Find restaurants willing to donate soup.

Guests enjoy a meal of soup and bread and select a handmade bowl to take home. (The bowls aren't designed for food but as a symbolic reminder of people in need.) Some organizations have included an auction with this event, auctioning off some of the bowls made by local celebrities and artists. Some organizations sell tickets, but others just ask for a donation at the event.

Consider collaborating with other local nonprofts for such a fundraiser. For example, an art center, family center, and food pantry might organize the event and share the proceeds. When several groups in Hopkins, Minnesota, first tried the event, the yield was over $40,000.

iPads in the Board Room: Efficiency-Booster or Time-Waster?

What impact is the "electronic board book" trend having on board engagement and leadership?

By Dottie Schindlinger

These days, board rooms are filled with directors staring at small screens. In my job I spend most of my time interacting with nonprofit board members and the staff who support them. In the past six months, I've seen an explosion of electronic gadgets in every board room I enter. By far the most popular choice is the Apple iPad, which is quickly becoming the "must have" device for board members. The iPad provides board members the ability to download board meeting packets and annotate them right on the iPad screen — no paper or pen required.

When I decided to write this article, my firm conducted a quick poll of our clients to find out what devices their board members are using to download and review board or committee meeting packets. From over 350 respondents in healthcare, higher education, associations, private foundations, aging services, human services, government, and other nonprofits, over half turn to their iPads.

AND THE WINNER IS. . .

. . . iPad, with 52% of surveyed board members using the device to navigate board meetings.

Those not using iPads reported turning to the following to review and/or download their board materials:

- **laptops,** 28%
- **desktops,** 18%
- **other,** including other tablet computers and smartphones, 2%

There's no question that the iPad trend is causing great excitement among board members and the staff who support them. It's clear that moving to an electronic board book and carrying a thin, lightweight device is far easier — and greener — than lugging around three-ring binders stuffed with paper. We're seeing many organizations save big bucks on staff time, paper, printing, and mailing costs by moving to an electronic board packet delivered via iPad.

What isn't as clear yet is the impact this trend is having on director engagement in the board room. I'm beginning to hear questions about whether using devices such as iPads can become a distraction. In this article, I want to share with you some of the latest research as well as my own impressions from working with hundreds of boards — all trying to determine the best next steps.

First, a little background. The use of iPads in the board room coincides with the emerging trend of e-governance — the strategic use of Web-based board portals to enhance governance. Board portals are designed to streamline the creation and delivery of board information securely over the Internet.

> "Can devices such as iPads become a distraction?"

BOARD PORTALS BECOME THE NORM

The latest estimates:

- **One out of every two boards** uses a portal.
- **Another 20% plan to implement a board portal** within six to twelve months.
- **Fully 18% use tablet computers (typically, iPads)** with another 20% planning to roll out tablets within a year.

— survey conducted by KPMG, Audit Committee Institute

With the use of board portals having reached critical mass, many organizations are seeking the best delivery vehicle for the electronic meeting package. The iPad has emerged as the clear winner, with every major board portal vendor — including BoardEffect, Directors Desk, BoardVantage, and Diligent BoardBooks — releasing iPad apps to streamline board book delivery to the device.

This past summer, my good friend and colleague Steven Bowman, Director of the Australian-based firm ConsciousGovernance, conducted a survey of nonprofit CEOs and directors to determine where they stand on the e-governance curve and, in particular, what they think about using iPads in the board room. His survey revealed that 90% of respondents were already either in the process of implementing iPads in their board rooms or were thinking about doing so in the near future.

Over a third reported that directors were already bringing their own iPads with them to meetings — whether or not the organization was ready to move in that direction. He found nonprofit staff and board members are using iPads to deliver meeting packets; mark up documents and write notes in preparation for meetings; run slide presentations during meetings; take notes at meetings; and record, edit, and send meeting minutes.

Organizations that analyzed the return on investment found that purchasing iPads paid for itself within four to six months of usage based on the cost savings resulting from less use of paper, printing, postage, and staff time.

iPads and Director Engagement: Some Observations

Still, the survey didn't touch on iPads' impact on director engagement. Because this trend is so new and growing so rapidly, determining its impact is like trying to hold water in your hand. Having said that, based on working with hundreds of boards, I'd suggest the following:

EMBRACE "iENGAGEMENT"

Board members don't seem to be distracted from the board meeting by their iPads. However, there is definitely less eye contact in board rooms where iPads are used.

> "These days, board rooms are filled with directors staring at small screens."

At one client's board meeting, I observed over 50 directors using iPads to participate in the proceedings. I sat near the back of the room where I could conveniently and unobtrusively see what directors were viewing on their iPads. To my surprise, I did not see a single screen that was tuned to anything other than the board meeting packet. It seemed to me that when board members were leaning over to speak with one another, they were offering advice and assistance to colleagues on where to find a particular page or paragraph. Everyone seemed intently focused on the meeting. However, all eyes were indeed glued to their screens, only glancing up occasionally to look at the presenter.

When I provide training to board members on how to use the iPad to review meeting packets, as I do dozens of times each year, I find myself looking around a room of faces with eyes glued to iPad screens. Yet, just when I fear I might have lost their attention, I'll pose a question to the group and every member is quick to respond. They are clearly following along. Eye contact and engagement aren't synonymous, and we shouldn't assume directors aren't paying attention just because they aren't looking up from their screens.

SET CLEAR "iGOALS"

While iPads can create efficiency in the governance process, boards shouldn't start using them without setting clear goals. My firm now works with over 33,000 board members, all of whom are moving to electronic board books. The single most important lesson we've learned from this work is that clear goals should be established before any transition begins.

Many well-intentioned people have attempted to introduce e-governance to their boards only to meet with incredible resistance. But this can be avoided: Simply have a conversation with the board about the greatest pain points in the governance workflow process. Then use their answers to establish shared goals for e-governance.

For example, the time and expense involved in preparing and delivering board meeting packets is the most common pain point we hear. By discussing pain points openly, groups can establish parameters for potential solutions, such as iPads, and create buy-in for making changes.

OFFER iTRAINING

iPad training should be offered to everyone, and policies should be established for how iPads should be used in meetings. Some training sessions might last 30 to 45 minutes, others might involve only a five-minute phone call with the board member's assistant, but the result is that each member receives the same basic information along with any additional coaching needed.

> "The iPad trend is causing great excitement among board members and the staff who support them."

I recently had a fascinating experience. One of our clients decided to provide one-to-one training sessions for each trustee on using our iPad app and board portal solution. During the training sessions, we were not only showing trustees how to use the app, but also showcasing the kinds of information available to trustees through the portal. One trustee turned out to be a famous technology inventor. Needless to say, hands-on training on an iPad app was unnecessary for this trustee. Instead, we had a quick conversation with his assistant, provided some simple instructions, and he was good to go. The point is this: Offering training to every trustee ensures everyone hears the same message, including any policies around how board members should use iPads in meetings.

Overall, I believe the iPad, along with the e-governance movement fueling its popularity, has great potential to increase efficiency and build board engagement. However, it will be up to each organization to set clear policies and group norms around how the gadget gets used. Ultimately those policies and norms will determine whether the iPad is a time-saver or time-waster in your board room.

As vice-president of e-governance for BoardEffect, Dottie Schindlinger (dschindlinger@boardeffect.com) promotes e-governance as an expert in the field. *This article is reprinted from* YOU and Your Nonprofit Board: Advice & Practical Tips from the Field's Top Practitioners, Researchers, & Provocateurs, *courtesy of CharityChannel Press, available at CharityChannel.com, Amazon.com, and barnesandnoble.com.*

iPads, Board Portals, e-Governance, & Beyond

For more, see these articles at www.NonprofitWorld.org/members:

Using Board Portals to Keep Directors Connected (Vol. 18, No. 3)

Powerful New Communication Tools for Your Meetings: Engaging Both Sides of the Brain (Vol. 26, No. 3)

Training Programs Need More than Good Information (Vol. 21, No. 2)

Beyond the Board Package (Vol. 27, No. 5)

It's Not Over till It's Over: Five Strategies to Improve Your Meetings (Vol. 30, No. 1)

Also see Learning Institute programs on-line: Board Governance (www.NonprofitWorld.org/LearningInstitute).

The Neighborhood Just Got Bigger: Protecting Trademarks in the Expanded Internet

New domain names are opening an Internet "land rush." Is your organization ready?

By Mark Partridge

A sea change has begun, and the Internet will never be the same. Domain names are no longer limited to .com, .net, or .org, the standard generic top level domains (gTLDs). Hundreds of new gTLDs have started coming online, and the flood will increase in the next few months.

Last summer, the Internet Corporation for Assigned Names and Numbers (ICANN), the private entity responsible for managing the global domain name space, signed the first four contracts to launch new gTLDs starting this year. Hundreds more will follow over the next few months as ICANN completes the process of reviewing and approving the initial 1,930 applications filed by a wide range of businesses, communities, and associations. A complete list of the applications and their status can be found at www.icann.org.

The new gTLD applications include generic terms such as .charity, .search, .church, and .catholic; geographic terms such as .london, .berlin, .africa, and .nyc; and brand names such as .chevrolet, .bridgestone, and .toshiba.

Some organizations may simply decide to build specialized Web sites within these new domains. Others could use them to host e-mail or online communication networks for supporters, volunteers, and clients. The next few years will be a period of considerable innovation.

Our focus here, however, is on the challenge presented at the second level — the space to the left of the dot. Organizations need new strategies to protect their trademarks, names, and other valuable intellectual property. They need to find ways to secure key domains in the coming "land rush" as new registries open.

Here are three steps you can use to meet this looming challenge:

Step One: File Trademarks in the Trademark Clearinghouse

The Trademark Clearinghouse is a database for recording existing trademark registrations and evidence of use. More details are available at www.trademark-clearinghouse.com. The Clearinghouse is now open for recording trademark rights in connection with the launch of new gTLDs.

The Clearinghouse offers three key benefits:

- **Sunrise registration in the new gTLDs.** Essentially, Sunrise is an opportunity for trademark holders to secure matching domain names in a new registry before it is open to the general public.
- **Intellectual Property (IP) claims notices.** These notices let a domain applicant know that the requested domain may violate an existing trademark. They also notify the trademark owner of the domain registration.
- **Uniform Rapid Suspension (URS).** This is a new procedure to resolve domain name disputes. Using this process should greatly reduce the costs of resolving conflicts.

> **"A sea change has begun, and the Internet will never be the same. It's time to take action now."**

Clearinghouse fees are $150 per record for one year (plus legal or agent fees, depending on the amount charged by your advisors).

Step Two – Secure Rights to Trademarks & Names in the New Domain Name Registration

The second step in our recommended strategy is to obtain desired active and defensive domain name registrations in the new gTLDs. This is actually a long-standing best practice in the more familiar world of .com and .org. Securing the rights to a low-cost domain does require budget resources, but it is quite a bit cheaper than legal action to enforce trademark rights after the fact.

The key question is how much budget this strategy will require, and the answer is unknown at this point. The fees charged for domain names in the new gTLDs will be determined by the registry owner. With 1,930 new gTLDs coming online, organizations must set priorities.

Begin by identifying the desired gTLDs for active and defensive registrations. The pending applications can be found at the ICANN site identified above. Match these gTLDs with Clearinghouse records to identify and obtain potential Sunrise registrations in the new gTLDs.

It is also wise to give someone clear responsibility for managing this process. That "someone" could be your in-house counsel, an IT manager, marketing personnel, outside experts, or a special committee representing several departments.

Finally, monitor the launch of the new gTLDs to avoid missing critical dates and opportunities.

Step Three – Create an Effective Enforcement Plan

The goal of enforcement is to prevent cybersquatting and infringing domain names when the new gTLDs are operating. An effective enforcement strategy will reduce lost opportunities, confusion, and damage to good will.

The key strategies for implementation include:

- **Set parameters for action and work flow.** As with the defensive domain registrations mentioned above, the management team

will need to set priorities. Some unauthorized uses may be more damaging than others. Having a set plan for work flow will improve efficiency and cost by saving time, reducing confusion about responsibilities, and avoiding second guessing.

- **Monitor intellectual property (IP) claims and watch services.** Registration in the Clearinghouse helps quite a bit on this front. Separate watch services will provide similar services. An effective enforcement plan requires regular attention to these notes to avoid delay and lost opportunities for early objection.
- **Send demand letters.** Many disputes can be resolved by sending an e-mail demand, particularly when the applicant is acting in good faith and the demand is supported by solid rights and based on a valid objection.
- **Negotiate purchase if appropriate.** Not all domain name disputes merit aggressive litigation. Domain names supported by bona fide use may justify payment for transfer.
- **Take legal action when needed.** Due to lessons learned over the two decades we've had the current Internet, several low cost and effective procedures are available:

1. All domain name registration contracts in the new gTLDs include use of the Uniform Dispute Resolution Procedure (UDRP). This is a contractually mandated form of expedited arbitration based on written submissions. A decision normally comes within a few months.
2. All new gTLD agreements include adherence to Uniform Rapid Suspension (URS), another expedited arbitration procedure that can be used to take down an infringing domain name in a few weeks.
3. Cybersquatting violates federal trademark law and can be challenged in federal court. Potential recovery includes statutory damages of up to $100,000 per domain name.

Take Action Now

These changes to the Internet have been in the works for years, and the process incorporates many tools built over the years to help protect trademark and intellectual property rights. Organizations need to be pro-active to leverage these tools.

There are 1,930 gTLD applications demanding your attention right now. Others in your field are already taking action. By following the guidelines in this article, you'll be able to manage this change effectively.

Mark Partridge is the founder of Partridge IP Law, a Chicago-based law and intellectual property (IP) strategy firm (www.partridgeiplaw.com). He has worked in intellectual property law for more than 30 years and was named one of the top trademark lawyers in the 2012 edition of The International Who's Who of Trademark Lawyers.

The Short List

For more, see these articles at www.NonprofitWorld.org/members:

Simple Lessons to Preserve Your Brand (Vol. 31, No. 4)

Why You Should Consider Trademark Protection (Vol. 23. No. 4)

Where to Find Free Legal Assistance (Vol. 26, No. 2)

Turn a Winning Process into Income for Your Organization

Can you adapt these ingenious ideas for your organization?

By Karen Eber Davis

"Most online calendars are not very good," says Jonathan Glus, the CEO of the Houston Arts Alliance. "We knew, with our help, that groups could develop great ones." The Houston Arts Alliance can help any organization, for a fee, to develop a super calendar modeled after the one it sponsors, Artshound. On a recent Saturday, the calendar listed over 140 events that users can sort by organization, venue, location, and start time.

The impetus for the calendar service was an income inventory that revealed that other revenue wasn't going to provide enough resources for the Houston Arts Alliance to reach its goals. Now the Alliance is well on its way to meeting its goal to raise $250,000 annually with the calendar service.

> "Determine a strong "why" to boost your commitment."

Likewise, the Health Councils, a community partnership in Florida, realized that seniors with chronic health challenges needed help obtaining prescription drugs. In response, they developed MEDNET, a set of Web tools that help health clinics provide access to prescription drugs for low-income residents. The process also gives the Health Councils a regular, sustainable income.

What Is The Strategy? How Might You Use It?

What essentials create this strategy? Both income streams began when a nonprofit successfully solved a challenge. Both recognized that others needed similar solutions. By offering the solution to others for a fee, the sponsoring nonprofits increased their income.

Your organization may be able to adapt this strategy if you have — or can envision — a successful process you can market to others. If so, here are some additional considerations.

Excellence. Each nonprofit first solved a challenge with excellence:

- Most calendars are clunky. The Artshound calendar allows users to select venues, dates, accessibility, locations, and other relevant client information with ease.
- MEDNET is very efficient at accelerating intake and processing so that health clinics can easily provide low-income seniors with access to free prescriptions from drug companies.

Both these models help nonprofits serve customers more quickly and adeptly. Start with excellence.

Self-Belief. Nonprofits create many wonderful solutions. Yet it takes self-belief to announce to others, "It works for us. We can adapt it to make it work for you."

Both nonprofits tweaked processes to share them:

- Artshound lacked a sports component that the University of Houston needed, so the Arts Alliance added it.
- The Health Councils adapted MEDNET so that it would work in clinics as well as in the MEDNET office.

Believe that your organization can help others at a price that earns a profit.

Capacity. Any nonprofit adding a new service will need additional capacity to provide it. You might obtain this capacity with existing staff or new personnel.

You also need capacity to deal with the risk a new enterprise adds. Start-up may take longer than you expect, requiring more money. Identify the capacities you need and how you'll obtain them.

Commitment. Even if you have a great process, strong beliefs about your value, and the capacity to pursue the idea, you still need to determine if the service is a place to invest your resources. One nonprofit that was providing software to others recently decided to stop taking new customers. The effort distracted it from its mission.

Both organizations profiled here have good reason to be highly committed to their new initiatives:

- The Arts Alliance's commitment rests on the fact that it needs more income to reach its goals.
- MEDNET benefits people in surrounding communities — ones not served by the Health Councils. However, since the counties' borders are porous, it makes sense for the Councils to expand MEDNET's reach across those borders. Doing so improves the health of many more people, which helps fulfill the organization's primary mission. Thus, it has every reason to commit to this new service.

Before you pursue any new strategy, determine a strong "why" to boost your commitment.

Karen Eber Davis (karen@kedconsult.com, kedconsult.com, 941-924-4860) is an expert in nonprofit innovation and income and author of Nonprofit Income Without the Mystery.

WHAT'S UP ONLINE?

To broaden online discussions on nonprofit topics, we're expanding our Discussion Forum with a ListServe, provided by Yahoo Groups. To join, you can either click on the "Yahoo" button at:

http://www.NonprofitWorld.org/social/

(free Yahoo login required)

or send a blank e-mail to:

NonprofitWorld-subscribe@yahoogroups.com

If you have any questions, contact Jason Chmura at jchmura@NonprofitWorld.org.

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- Free job postings on our NonprofitCareers.org job site

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www.NonprofitWorld.org

Control-Alt-Delete: When It's Time to Push the Reset Key

By Paul Lemberg

What do you do when you're at a dead end and nothing seems to work?

Sometimes we find that our time-tested ways of doing business get fewer and fewer results. It's hard to say how this happens, except that in a complex environment — just like a computer operating system — the combined effects of other players' actions can cause your own efforts to get garbled and twisted. A year ago, your latest marketing launch might have made a big splash, but now, maybe because of new competitors with bigger marketing budgets than yours, you've made barely a ripple and all your efforts seem wasted.

So you go back to your playbook, your well-worn collection of strategies that always helped in the past, but nothing seems to work. And worse, you don't know why.

Relax, and take a deep breath, because nothing you know how to do is going to work, and following your standard playbook is like pouring money down the drain.

It's time to hit the three-fingered reset key: Control-Alt-Delete. That's what you need when your old rules, even though they still apply, aren't getting what you want. You need to clear your mind, wipe the slate clean, write on a new sheet of paper.

Hitting the reset key won't cause your competitors to go away. But it will give you the opportunity to shrug off old patterns of thought.

Pressing the reset button can be a way to achieve a new level of thinking. Instead of asking a question based on what has worked in the past, you start asking about what in the realm of possibility might work now.

Why do most cars use the same inefficient engines and fossil fuels? Why are we stuck with sub-standard television options? Why do most cell phone data systems work as poorly as they do, given that some countries have achieved speeds 20 times faster? It's because all the players — producers, consumers, regulators, investors — have agreed to play by a set of rules requiring a major investment, and no one is willing to take the risk of breaking them.

> "Can you break the rules of your own past behavior?"

Does the same hold true for your organization? Are you bound by a real set of constraints that limit your ability to address new opportunities? In all probability, the answer is no. The rules most likely aren't hard and fast. Nobody has bothered to prove these ideas to be sure they make sense. They're simply accumulations of past history, the way things have always been done.

Can you break the rules of your own past behavior or perhaps, even more boldly, the rules set down by decades of organizational and cultural norms? Hit the reset key and see what happens.

Paul Lemberg is the director of Stratamax Research, a strategic consulting and coaching firm (lemberg.com, 760-741-1747, paul@lemberg.com).

A Few Ways to Stimulate Your Mind

How do you gain control of your reset key? Try getting away from your usual routine with these suggestions:

Put your ideas into a grid. Draw an n-row, m-column matrix, and write your thoughts along the axes. You can write the same set of thoughts along both axes, or you can divide thoughts into categories like nouns and verbs, and arrange them accordingly. Now let your mind roam and figure out what should go in the intersections.

Read something in a new subject. Read history, biographies, philosophy, pop science, real science, mathematics, plays, poetry, finance. Read whatever you usually don't.

Attend a seminar. The subject matter is unimportant. You'll usually come up with great ideas even though they may be unrelated to the speaker's words.

Exercise. Solitary aerobic exercise works best. Ride a bike, run, stair climb, walk fast. Be ready to write down all the ideas that come to you while your mind is wandering free.

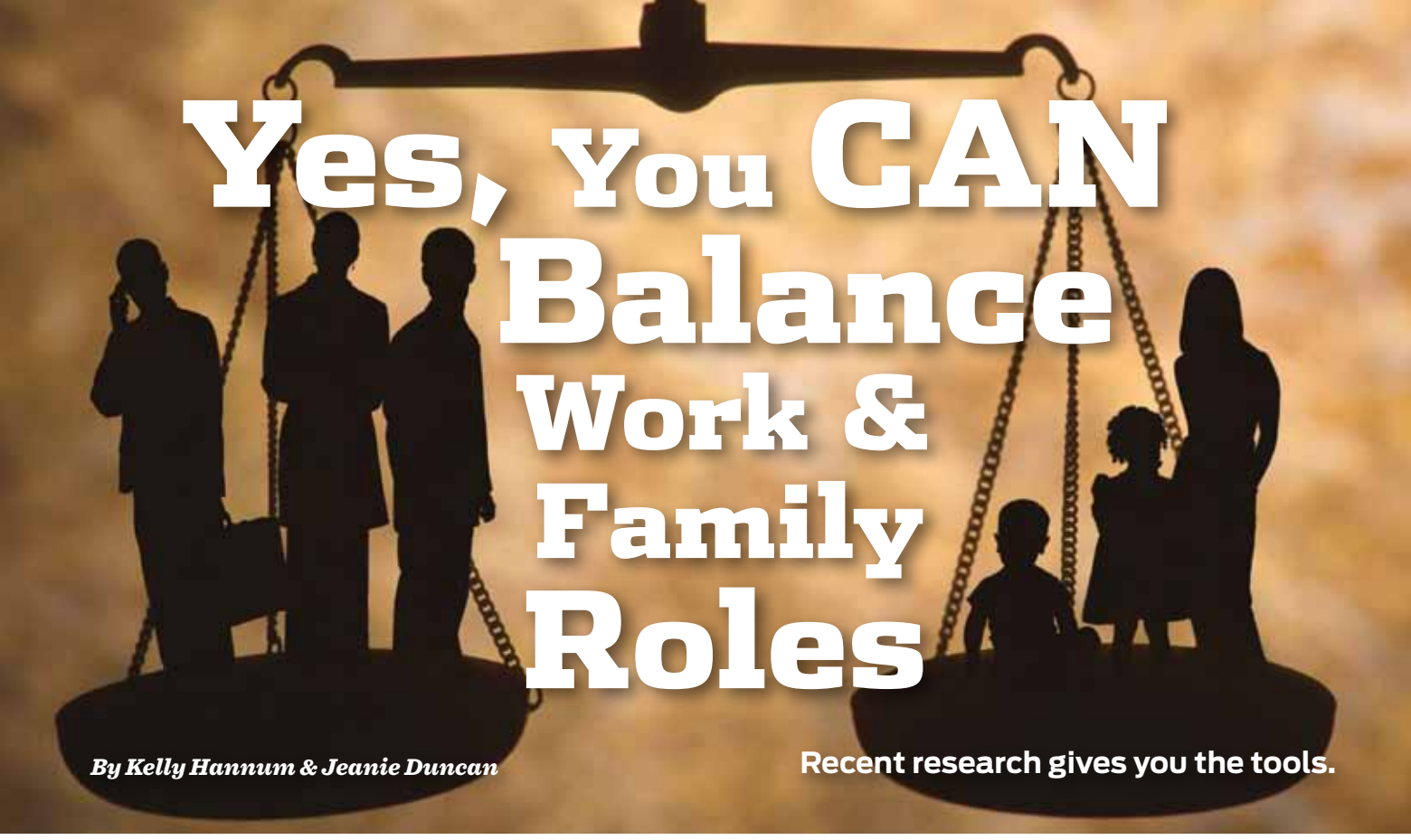
Meditate. There are two types of meditation that work well to refresh the mind. With free-form meditation, you concentrate on a word or simple image. With more focused meditation, you direct your mind to dwell on a specific "problem" or idea.

Draw or paint. These activities work like aerobic exercise, opening up the creative part of the brain.

Call a friend – preferably someone you don't speak with often. Talk about anything. This seems to work like the "seminar" process. All of a sudden, stuff blurts out of your mouth and exciting new ideas are born.

Coming Up in *Nonprofit World*

- How Mobile Marketing Can Work for You
- Can You Raise Money by Selling Ads?
- When the News Isn't Great
- Post-Recession Donors Have Changed
- Exercising Board Leadership with Social Media
- How Can You Improve Your Donor Retention Rate?
- Transform Your Relationship with Funders
- Accomplish More with Pro-Bono Services: Are You Making the Most of This Valuable Asset?
- Implementing "Lean" in Your Organization



Yes, You CAN Balance Work & Family Roles

By Kelly Hannum & Jeanie Duncan

Recent research gives you the tools.

Nonprofit leaders routinely take on multiple roles and responsibilities, both at work and in their private lives. It's a juggling act that often creates frustration and tension. Getting pulled in too many directions can make you feel as though succeeding in one part of your life means sacrificing success in another.

> "You can be successful in your career and not be a work-focused person."

The tension between work responsibilities and other life roles emerged loud and clear in research sponsored by American Express and led by the Center for Creative Leadership (CCL).[1] When researchers delved into the world of nonprofit leaders, they found that the dividing line between work and personal time has blurred. There's an increased expectation that anyone will be available at any time, regardless of where they are and what they're doing.

The lack of separation between work and personal time is particularly bothersome to younger nonprofit leaders. They report more feelings of work-family conflict than their older counterparts.

You might assume that always being available and "on the job" benefits your organization. But ironically, the opposite is more likely to be true. As your attention is fragmented and you're pulled in multiple directions, you could become a candidate for chronic stress. You may find your health suffers, your cognitive function is impaired, and your energy level plummets.

Finding a workable approach to life can benefit your well-being, relationships, *and* the organization you serve. Here are five steps that can help:

> "There's an increased expectation that anyone will be available at any time."

1. Assess Your Style. What Works for You?

Identifying your preferences can help you manage the roles you play and improve your effectiveness both on and off the job. Once you understand your patterns, you'll have a practical framework for clarifying work life/personal life tensions and coming up with possible solutions.

CCL worked with Michigan State University Distinguished Professor Ellen Ernst Kossek to identify three factors[2] to consider as you think about what's right for you:

Factor 1: Identity. When you decide how to spend your time, your most strongly valued identity is likely to win out. So think about how you see yourself. There are four possibilities. Which are you at your core?

- Are you ***work-focused***? If so, you think of yourself mainly in terms of your career role.
- Are you ***family focused***? Do you see yourself primarily as a parent, spouse, or friend?

[1] *Emerging Leadership in Nonprofit Organizations: Myths, Meaning, and Motivations,* American Express and the Center for Creative Leadership, ccl.org/leadership/pdf/research/AMEXReportEmergingLeadership.pdf.

[2] *CCL WorkLife Indicator™: Increasing Your Effectiveness On and Off the Job,* ccl.org/leadership/assessments/WLIOverview.aspx.

> "How do you see yourself at your core?"

- Are you ***dual-focused***? Do you identify equally with your role at work and as part of a family?
- Are you ***other-focused***? Do you invest your identity mostly in interests unconnected to work or family? You might do so, for example, if you're a runner, writer, or volunteer dedicated to a special cause.

Remember that you can be effective and successful in your career and not be a work-focused person.

Factor 2: Behavior. To what degree do you let one role interrupt another one? There's a continuum of possibilities:

- Are you an ***integrator***? Do you blend work and personal responsibilities throughout the day?
- Are you a ***separator***, who separates work and personal roles?
- Are you a ***cycler,*** shifting back and forth between roles, with the rhythm and degree of separation varying in response to changing circumstances?

Any of these approaches can be productive. The trick is figuring out what will work best for you in your situation.

One nonprofit executive shared a management tool that worked for him. He was notorious for allowing phone calls, text messages, and e-mail to interrupt family time. During a family meeting, he made the commitment to physically turn off his smartphone when arriving home. He described it as having "a new lease on life," with his personal time truly dedicated to that purpose. Rather than getting behind on work, he felt recharged and was more prepared to face the day's tasks fresh and energized.

Factor 3: Control. The amount of control you have over your behavior is especially important. Answer these questions:

- ***How much say do you have*** in how you manage the boundary between your work and family life?
- ***Do you make those decisions yourself?*** Or do schedules or other external circumstances dictate where the boundary is drawn?

The less control you feel over how you manage boundaries, the more likely you are to become stressed out and to be less effective than you might be otherwise.

2. Learn about Different Approaches.

There are many ways to manage multiple roles, and it's not a one-size-fits-all challenge. Explore what others have written, and talk to coworkers and friends about what works for them.

An approach effective for someone else may not work for you at all. But finding out about various techniques increases the possibility that you'll find something that does.

Try brainstorming new approaches. For example, you might rethink how you use technology and when. If you prefer to keep a thick boundary between work and home, you might use separate mobile devices and e-mail addresses for each role, enabling you to turn off devices at key times. If you prefer to be always accessible, talk to family members and coworkers about how you'll set priorities and meet expectations.

Small changes can make a big difference. One nonprofit leader who listened to the news on her commute home found that the chatter made it harder for her to wind down from her busy workday and be fully present with her family. Her simple solution was to turn off the radio or to listen to relaxing music instead.

If you want to make an impact on others who are part of your nonprofit team, explore possible policy changes. A director of an art museum decided to loosen policies so individuals could deal with personal and family needs during the workday and make up the work during off hours. She established clear expectations and refocused her team on performance and deliverables — not on rigid hours that governed when the task was accomplished.

3. Envision a Better Life.

There are benefits and tradeoffs with any approach you take toward work-life boundaries. You can weather the stressful times more successfully, though, if you're crystal clear on your goals, priorities, and preferences.

Think through what a more sustainable version of your life would look like and why you make the choices you do. For example:

- **If you're constantly connected to your smartphone,** do you understand why you've made that choice?
- **If you're working extra hours,** what are you trying to accomplish? Are extra hours the best way to get there?
- **What are the negative consequences** of working more? We all need to burn the midnight oil sometimes, but making it a habit can be harmful. People who are well rested tend to perform

Building a Productive & Sustainable Workplace

Issues of work-life fit don't only affect nonprofit leaders individually. They also have an impact on organizational sustainability.

With the potential of constant access, keep in mind that working more doesn't always lead to achieving more. When members of your team work nonstop, it 's easy for them to burn out.

It can also be easy to get caught up in the mindset of, "If I don't see you working, you must not be working." In some cases, people may be more productive when they're not in the office.

Help your organization set clear policies and expectations about establishing and respecting appropriate boundaries. Here are a few key points to keep in mind:

Focus on the impact and quality of each person's work — not just the hours worked.

Examine whether there are embedded, cultural assumptions that working long hours is a proxy for organizational commitment.

Develop succession plans across the organization. Be clear about possible career paths and what it takes to move forward.

Pay attention to managing the emotional and physical impact of working long hours. Be sensitive to signs of burnout in yourself and others.

Be a role model and promote discussions about the positive, sustainable impact of managing work and family roles.

better, so there's a point at which working extra hours can hurt your performance rather than enhance it.

Have a vision for the way you want the boundaries between work and home to be drawn. Use that vision to guide how you manage your life and your time.

4. Get Support.

Having a support network can help you achieve your goals. Family members, friends, colleagues, and mentors may be able to help you manage your time and energy. They can empathize and provide encouragement as you begin to adjust the balance between your work and personal life. When they understand what you're trying to do, they can better advise and support you. And who knows, they may even volunteer to take some tasks off your plate!

5. Track Your Progress.

Making life changes requires focus and commitment. To help you stay on track, make a plan and monitor your progress. Become accountable to yourself and your work-life stakeholders. Experimenting with different tactics and taking time to reflect on their impact will help you see more clearly what works for you and where the pitfalls are.

Living a Successful Life

Living your life in a way that feeds your soul is ultimately about control. You need to exercise leadership in your own life.

The possibilities of what success looks like are endless — with no right or wrong way forward. Stay true to yourself. Determine what you want your life to look like, and work toward making it happen.

That's the approach taken by Elizabeth, a 38-year-old who thought she was too young to be burned out. She had worked her way up through the ranks to lead a nonprofit school serving special needs children. It wasn't a *job* to her. The school was her life.

Many days, she would arrive at five or six in the morning, well before other staff and teachers, and often stay into the evening. Weekends involved school functions, and Elizabeth was invariably present — the hands-on leader with her team. She knew the importance of being a constant presence and "face" of the institution. It was a role that called for her to be always "on."

Active in her community, she volunteered, served on local boards of directors, and represented the school in many public functions. She was recognized and respected as a rising young leader.

This pace had begun when Elizabeth was 32 and appointed director of the school. At age 35, she had the first of two children and continued to work. At 38, she found herself physically exhausted, emotionally drained, and concerned about her health. After much deliberation, she asked her board of directors for a sabbatical and was granted a four-month leave.

She used the time to rest and recharge, reconnect with friends and family, and immerse herself in activities that restored her energy and creativity. Ultimately, she discovered her health issues were largely stress induced.

Elizabeth now cites her professional pause as a turning point in her career. She feared she had "become the role" — intensely work-focused for so long that she had lost herself to it. The time off helped her focus on herself as a whole and creative individual, spouse, and parent.

> "What would a more sustainable version of your life look like?"

> "Talk to family members and coworkers about how you'll set priorities."

Elizabeth returned to her job committed to sustainable new practices. While on sabbatical, she discovered the true depth and talent of her leadership team. She found the organization wasn't exclusively dependent upon her, and that a shared leadership approach could yield a more empowered, effective team. Over the last year, she's transitioned to sharing responsibilities, operating at a more reasonable pace, and adjusting her demanding expectations of herself.

She's found herself more comfortable (and successful) at interweaving work and family in her day, rather than always leading with work. She's managing boundaries, especially as they relate to evenings and weekends. And she's created her own personal board of directors — a small, select group of professional colleagues who support and champion her and hold her accountable to her new practices. She has become a role model for managing work and family roles successfully.

Kelly Hannum, Ph.D., is a senior research scientist at the Center for Creative Leadership (hannumk@ccl.org). She is one of the authors of the WorkLife Indicator *and the* Leadership Across Difference Casebook Package *(Pfeiffer).*

Jeanie Duncan, CFRE, is president of Raven Consulting Group (jduncan@ravenconsultinggroup.com). She has spent more than 20 years in executive roles in the nonprofit sector, most recently as president and CEO of the United Arts Council of Greater Greensboro.

Bypassing Burnout

Keep your life and organization in balance with these articles from *Nonprofit World* (NonprofitWorld.org/members):

Free Yourself by Sharing Leadership Duties (Vol. 29, No. 5)

A Three-Step Approach to Managing Workplace Stress (Vol. 22, No. 1)

Manage for Today, Mentor for Tomorrow (Vol. 23, No. 5)

Vacation Time: More than an Administrative Matter (Vol. 24, No. 2)

The Overwhelmed Office: Six Fixes for the Stressed-Out, Productivity-Challenged Workplace (Vol. 28, No. 4)

Planning to Succeed: Creating a Succession Plan (Vol. 29, No. 3)

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

Don't Alienate Donors by Giving them Improper Receipts

By Doug Roberts

Do you know all the rules surrounding tax deductions for donations? If not, you may end up with very unhappy donors.

Ask yourself these questions:

Do your fundraising and financial staff know which contributions are deductible?

Do they understand how to acknowledge donations? Do they know the legal requirements and time limits for such acknowledgments?

Such basic knowledge is essential if your organization is to stay in good stead with your donors and the IRS.

Section 170 of the Internal Revenue Code allows taxpayers a deduction if they have the necessary substantiation. Both donors and nonprofit organizations have a part to play:

- **The donors' responsibility is to ensure they have the necessary substantiation** required to claim their deductions.
- **The nonprofit's responsibility is to provide donor acknowledgments** for contributions received. Courts consistently deny people their deductions if the organization gives insufficient acknowledgments — or doesn't do so in a timely way. Good intentions are insufficient. Ignorance of substantiation requirements is not a valid defense.

Donors without proper acknowledgments may receive penalties from the IRS. You're likely to upset donors if they're punished due to your negligence. Not only will such angry donors stop supporting you, they may spread the word and ruin your reputation. After all your hard work attracting supporters, that's the last thing you want to happen.

What Are the Rules for Donation Receipts?

To deduct their charitable contributions, donors need an acknowledgment for any gift of cash or property of $250 or more, any gifts of currency no matter the amount, and any gifts of $75 or more when the donor receives something in return for the contribution (called a quid pro quo contribution; see below for more about such donations).

> "It is wise for your organization to acknowledge *all* gifts."

This acknowledgment must be:

- **contemporaneous** (received by the donor by the date the return is filed or the due date of the return, whichever is earlier)
- **from a qualified** nonprofit organization
- **in writing** (either on paper or in electronic form).

For donations less than $250 other than currency and quid pro quo contributions, donors need not have acknowledgments. In the interest of donor relations, however, it's wise for your organization to acknowledge *all* gifts.

If a donor has contributed multiple times, you can provide a separate acknowledgment for each donation, or you can provide a summary of all donations within the year. Acknowledgments should be provided by January 31.

Although there is no prescribed form for the acknowledgment, the following elements must be present:

- **the name** of the nonprofit organization
- **the date** of the contribution
- **the amount of cash** or a description of the property contributed
- **a statement** of whether goods or services were provided in exchange for the contribution or whether only "intangible religious benefits" were provided. When you provide goods or services (which may include cash, property, benefits, or privileges) in exchange for a contribution, you must give a description and good faith estimate of the fair market value of the goods or services. If you don't provide any goods or services, it's important that you include a statement such as, "We haven't provided any goods or services in consideration of your contribution. Therefore, your entire contribution is deductible as a charitable donation for federal income tax purposes." Without such a declaration, the IRS will disallow the deduction.

You should provide a similar acknowledgment if you receive contributions through payroll deductions. However, if the payroll deduction passes through an intermediary organization (such as the Combined Federal Campaign), you needn't acknowledge it.

For contributions of property, it's the responsibility of the donor, not your organization, to value the property. But you would be wise to describe the condition of the property, since deductions for goods like household items and clothing are allowed only if they're in good condition. It's also good practice for you to tell donors that they may have to file Form 8283 for their non-cash contributions.

What Should You Do about Non-Deductible Donations?

Not every contribution is deductible. Take care when you receive something of value that isn't tax-deductible. Your thank-you letters to such donors shouldn't suggest that the gift is a tax-deductible contribution. You would be well-advised to include a note clearly explaining that the contribution isn't deductible for federal income tax purposes.

Examples of common non-deductible contributions include:

- **time and services** provided by a donor (although unreimbursed expenses incurred by the donor in providing the services may be deductible and are mentioned later)
- **contributions given with a restriction** that it be given to, or for the benefit of, a specific individual
- **the purchase price** of raffle, bingo, or lottery tickets
- **certain contributions of a partial interest,** such as the rent-free use of an office building or vacation property.

IRS Publication 526 provides additional information on non-deductible contributions. If in doubt as to whether a contribution is deductible, consult a tax expert.

What Special Circumstances Should You Keep in Mind?

Here are a few additional requirements that occur in certain cases.

QUID PRO QUO CONTRIBUTIONS

When you provide goods and services in exchange for a contribution of $75 or more, your acknowledgments should:

- **give** the contribution amount
- **estimate** the fair market value of the goods or services provided
- **state** that the amount the donor may deduct for federal income tax purposes is limited to the excess of the contribution over the value of the goods or services provided.

Note that it's the *value* of the product or service that you must give the donor, not your cost to provide it. Fair market value is the price that a knowledgeable, willing, and unpressured buyer would probably pay to a knowledgeable, willing, and unpressured seller. That value may be quite different from what it costs your organization.

When you solicit such donations, your solicitation materials must clearly declare the value of the goods or services you're providing and the amount of the contribution that will be deductible. The statement provided with the solicitation satisfies your acknowledgment requirements.

There are two times when the entire contribution is deductible and you needn't state the value of goods or services you provide:

1. ***The first exception*** occurs when you provide "insubstantial" goods or services. Goods or services are insubstantial in the following cases:
   - **The fair market value of the product or service is less than 2% of the contribution** or $102, whichever is less.
   - **The contribution is for at least $51, and the goods bear the organization's name or logo** and are valued at $10.20 or less (for instance, coffee mugs, address labels, t-shirts, or calendars).
   - **Free, unordered goods included with a solicitation request are valued at $10.20 or less,** and recipients are informed they may keep the gift even if they don't make a donation.

(These dollar limits are indexed annually for inflation. Revenue Procedures 90-12 and 92-49 and the inflation adjustment in Revenue Procedure 2010-40 can be used to determine dollar limits in future years.)

2. ***The second exception*** is when you provide membership benefits under the following conditions:
   - **The membership benefits are given in exchange for donations of $75** or less.
   - **The benefits include privileges** (other than the right to purchase tickets to athletic events) that can be used frequently as a member (for example, free or discounted parking or discounts on services).
   - **You offer member-only events that cost your organization less than $10.20 per person** (adjusted annually for inflation).

In the following cases, you *do* need to provide a statement about member benefits in your acknowledgment:

- **If members can't use their benefits frequently** (because, for example, there are a limited number of member events), let them know that they must report the value of the benefits.
- **For contributions that include the right to purchase tickets to an athletic event,** let donors know that they can deduct only 80% of the contribution. If the contribution includes the purchase of tickets as well, the acknowledgment should indicate the fair market value of the tickets.

Fines for failure to provide required written statements to donors are $10 per statement up to a maximum of $5,000 per mailing or fundraising event.

VEHICLES

It's the donor's responsibility, not yours, to find someone to assess the value of donated vehicles (including cars, boats, and airplanes). If the assessed value is less than $500, acknowledge it as a property donation as discussed above. For values greater than $500, your acknowledgment must include the following:

- **the donor's** tax identification number
- **the vehicle's** identification number
- **a statement certifying** what your organization intends to do with the vehicle.
  - ***If you sell the vehicle,*** your receipt must include the proceeds from the sale and a statement that the taxpayer's deductible amount can't exceed the gross proceeds from the sale.
  - ***For vehicles not intended for resale,*** your statement should state the intended use and duration of such use.

> "It's up to volunteers to keep track of their expenditures."

> "Ensure that auction bidders intend to make a contribution above fair market value."

- ***If you give the vehicle to a needy individual*** (or sell it to such a person for significantly below its market value), your acknowledgment should certify that the sale or gift furthered your organization's charitable purpose.

You must also file Form 1098-C by February 28 (March 31 if filing electronically) of the year following the vehicle donation. In lieu of a written acknowledgment, you can provide the donor with a copy of form 1098-C (no later than 30 days after the sale date if you sell the vehicle or 30 days after the contribution date otherwise).

Note that vehicles donated by car dealers would be considered a donation of inventory and would be acknowledged as contributions of property. For further guidance on vehicle donations, see IRS Publication 4302, "A Charity's Guide to Vehicle Donations."

VOLUNTEER SERVICES

The donation of someone's time isn't deductible. But volunteers may be able to deduct the expenses they incur in providing services to your organization.

It's up to volunteers to keep track of their expenditures and decide if they're deductible. It's up to you to provide an acknowledgment following the guidelines of non-cash contributions. On your acknowledgment, include:

- **dates** of the volunteer services
- **description** of the services provided
- **statement** of whether you did or didn't provide any goods or services in exchange for the volunteer work.

AUCTION DONATIONS AND PURCHASES

A number of special rules surround auctions. Here are the major ones to remember:

- **Acknowledge goods donated to be auctioned as property contributions.** Describe the property donated, but don't state any value.
- **Donated services and the use of a donor's property** (such as a week's use of a beach house) aren't deductible, and you shouldn't provide any receipt for such donations. You may, of course, send thank-you letters, but don't imply that such donations may be tax deductible.
- **If a donor purchases a service or pays for the use of someone's property, and donates this,** that is deductible. Acknowledge it as a non-cash contribution.
- **Auction bidders are allowed a deduction** if their payment is greater than the fair market value of the item purchased — but only if they intend part of the payment to be a contribution. To ensure bidders intend to make a contribution above fair market value, you must communicate the value of each item to potential bidders, and let them know that winning bids are deductible to the extent the bid exceeds the fair market value of the item. Receipts for winning bids should include:
  - ***the amount*** the bidder paid
  - ***the estimated fair market value*** of the items
  - ***a statement*** that the deductible amount is the excess of the amount paid over the fair market value.

The Power of the Receipt

Your acknowledgment is more than a legal duty. It can be a tool to draw donors closer to your organization. For more on the in's and out's of donor acknowledgments, see these articles at NonprofitWorld.org/members:

Can You Acknowledge Donors Via E-Mail? (Vol. 19, No. 4)

Tax Court: No Mercy for Donors with Inadequate Receipts (Vol. 31, No. 1)

Going, Going, Gone! How Much Can Charity Bidders Deduct? (Vol. 19, No. 5)

Need a CPA at Little or No Cost? Five Ways to Find Help (Vol. 28, No. 2)

Are You Giving Donors Proper Receipts? (Vol. 17. No. 6)

Can Property-Use Donors Claim Deductions? (Vol. 26, No. 2)

Looking a Gift Horse in the Mouth: Gifts of Property (Vol. 16, No. 1)

Are Bazaar Payments Deductible? (Vol. 16, No. 1)

How Much Detail Is Needed in a Thank-You Letter? (Vol. 27, No. 1)

OTHER REPORTING REQUIREMENTS

Form 8283. Non-cash donors may be required to file Form 8283. In certain situations, someone in your organization will need to complete and sign a portion of the form. This is commonly the case with vehicle donations with values greater than $500 and other property donations valued over $5,000. Completion of the form verifies that your organization received the goods described and certifies what the organization intends to do with the contributed property but doesn't verify amounts claimed by the donor. The form must be signed by an officer of your organization or someone specifically designated as authorized to sign the form. For donations requiring donors to obtain appraisals, it's important to note that no one affiliated with the organization can ever appraise any property you receive.

Form 8282. You must file Form 8282 for property donations valued over $500 if you sell, exchange, or dispose of that property, rather than using it for your exempt purpose, within three years of receiving the donation. You must file the form and provide a copy to the donor within 125 days after the sale, exchange, or disposition of the property. Be sure you have a process in place to review copies of Form 8283 and donor acknowledgments to determine when any donated items are sold, exchanged, or disposed of within the three year period. You may incur harsh penalties if you fail to file the form.

Additional requirements may exist depending on the types of contributions. For example, you may need to file certain forms if someone donates intellectual property. For other less common types of contributions consult a tax expert to determine if there are additional reporting requirements. The Charities & Non-Profits page on the IRS' Web site provides other helpful resources at http://www.irs.gov/Charities-&-Non-Profits.

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Motivating Volunteers?

Forget the Carrots & Sticks

By Stephen C. Rafe

Our usual ways of motivating people don't work. Here's what does.

Volunteers are rarely offered financial incentives, so "carrots" in terms of physical rewards (money, trophies, the boss's parking place for a month, and so on) aren't usually an issue in that sense. And while "sticks" may seem to work at times, they're also counter-productive. This is especially true with people who have the option of quitting.

Fallout

Yet, in the workaday world, carrot and stick approaches continue to prevail despite the fallout associated with each of them. Both involve external or "extrinsic" actions based on what others are doing *for* individuals or *to* them.

After receiving carrots (rewards) for a while, people come to expect them. These rewards then actually demotivate people's achievement drive. They come to simply do what's expected of them. They may start cutting corners to make deadlines, budgets, or productivity targets.

Sticks (real, threatened, or implied punishments) are demotivating from the start and are known to cause paid workers to "cheat" (alter reports to look good, for instance, or even to sabotage to "get even").

True Motivators

Author Daniel Pink cites numerous studies supporting the idea that neither carrots nor sticks work very well, or at least not for long (*The Surprising Truth about What Motivates Us,* Riverhead Books). He points out that the "elements of true motivation" are internal or "intrinsic": They come from within the individual.

> "Keep the goal from becoming an obligation."

These elements are consistent with Abraham Maslow's levels in his "hierarchy of needs." The five intrinsic needs that all people seek (once their physical needs for food, shelter, and the like are met) are:

1. **autonomy:** ability to direct their own work
2. **mastery:** the desire to gain experience and get better at what they do
3. **purpose:** the broad, overarching reason for the work
4. **esteem:** confidence, achievement, respect for others, and respect by others
5. **self-actualization:** the need for creativity, spontaneity, problem-solving, acceptance, morality, and lack of prejudice.

> Acknowledge that some of the tasks are, quite frankly, boring.

Neither carrots nor sticks help meet any of these vital needs. The carrot and stick approach is based on the concept of contingency: "If you do (this good thing) then you'll get (this good thing) or, conversely, "If you don't do (this good thing) then you won't get (this good thing) or you will get (this bad thing)." That formula does nothing to connect to people's internal motivators.

The Solution

So then, what can you do to ensure that people's intrinsic needs are met? The answers to these questions may suggest a way:

- **Why do people do something for "nothing"?** And, what is that "nothing"? Could it be recognition? The desire to make a difference? The desire to serve? To master a challenge? To do something just for the fun of it or the mere satisfaction of doing it?
- **In terms of volunteers' values, how important is quality?** And how do we know?

If extrinsic motivators don't work, what *does* work? Here are some proven answers:

- **Provide support, encouragement, and development** of the five intrinsic needs listed above.
- **Practice transformational leadership (persuasion)** rather than transactional leadership (directing or ordering). Whether you're working with volunteers or paid workers, studies conclude that "selling" or convincing (transformational) is far more effective than "telling" or commanding (transactional).
- **Show people the "big picture."** Communicate it clearly, consistently, and often.
- **Let them complete the task** their own way.
- **Help them see that the task or project** is, or can be, "interesting, challenging, and absorbing" (as Pink puts it).
- **Strive to keep the goal from becoming an obligation.** When people feel obliged, their drive toward self-actualization tends to deteriorate.
- **Clarify** what constitutes a success.
- **Share a vision of the task** that's consistent with the organization's mission, goals, and objectives.
- **Make sure that your organization's values and culture** match individuals' expectations.
- **Acknowledge** that some of the tasks or some parts of the tasks are, quite frankly, boring. Offer logical reasons for why such tasks have value.
- **Offer plenty of learning, training, and development opportunities.** Let people choose what *they* want to learn. Encourage them to pick the learning methods that work best for them (whether it's distance learning, in-person workshops, or the many other approaches available).
- **Enable, empower, and encourage people to work their way through the process,** one success at a time.

Stephen C. Rafe (stephen@rapportcommunications.net) is president of Rapport Communications (rapportcommunications.net), a consulting and coaching firm specializing in behavior-based communication (written and spoken), which he founded in 1986. Author of three HarperBusiness books on presentations and interviews, he has held executive positions in the nonprofit sector.

Looking Inward

For more ways to lead volunteers (and paid employees) with internal motivators and help them be the best they can be, see these articles at NonprofitWorld.org/members:

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

Creating a Values-Based Road Map (Vol. 23, No. 2)

Reach Out & Touch Someone: The Many Faces of Distance Learning (Vol. 20, No. 2)

Leading from Feeling: Coaching Tools for Interpersonal & Organizational Excellence (Vol. 27, No. 1)

The Nonprofit Executive as Chief Learning Officer (Vol. 16, No. 2)

Keeping Your Best and Brightest Workers (Vol. 28, No. 6)

How to Present Training Workshops that Educate and Inspire (Vol. 21, No. 2)

Motivating Volunteers to Perform (Vol. 31, No. 5)

Not Taught in Business Schools: How to Cultivate Creative Leading (Vol. 24, No. 5)

Values for Volunteer Viability (Vol. 30, No. 1)

Training Programs Need More than Good Information (Vol. 21, No. 2)

Grounded Visioning: A Quick Way to Create Shared Visions (Vol. 26, No. 4)

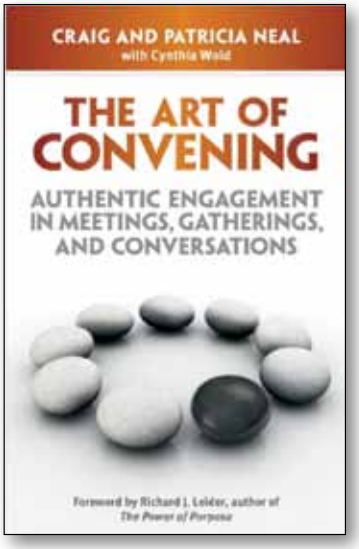
How to Create a Motivating Environment (Vol. 28, No. 5)

Keep Your Volunteers Happy with Dynamic Training (Vol. 31, No. 4)

Also see Learning Institute programs on-line: Volunteer Management (NonprofitWorld.org/LearningInstitute).

Gathering to Create Insightful Change

Don't just facilitate meetings. Create profound connections.



By Terrence Fernsler

The Art of Convening: Authentic Engagement in Meetings, Gatherings, and Conversations. **By Craig and Patricia Neal with Cynthia Wold. Softcover. 212 pages. Berrett-Koehler Publishers (bkconnections.com).**

Authentic engagement in meetings and gatherings connects people and energizes them. Energy and connection lead to commitment from participants, something we could certainly use more of. This book demonstrates principles and practices that bring about authentic engagement and leadership in meetings, other gatherings, and conversations.

At the heart of engagement is understanding who we are and how we will be in relationship with others. To engage authentically, we must be willing to express what is true for us and listen carefully to what is true for other people. Clarifying our own intentions opens us to communicating with others.

The authors explore the core elements of authentic engagement and examine the central challenge, key principle, and essential questions of each element. They also provide useful exercises to help readers put these principles into practice.

Practiced together, these keys can result in empowering, fulfilling gatherings. Meaningful connections become possible. These strong connections sow commitment to action.

When we understand ourselves and others, we uncover commonalities, including shared aspirations. We cut through fears and become more generous toward each other. We open possibilities and become strong teams and organizations, working together toward common goals and in common purpose. Wisdom and knowledge become collective.

Knowing how to engage meeting participants reveals these shared assets. The authors describe an effective way to use the basics of convening to become a more productive, cohesive, and sharing team.

Terrence Fernsler has been a nonprofit professional for over 30 years and is currently a candidate for a Master's in Nonprofit Leadership degree at Seattle University.

Core Elements of Authentic Engagement

Know who you truly are, at your core, and be willing to share your true self.

Clarify why you want to meet with others and what the purpose of the gathering will be.

Use warmth and a sincere tone to invite people to the meeting, not just asking for a body to turn up but conveying how important their full participation is.

Select a meeting space with care. Your surroundings will play a vital role in encouraging engagement. If possible, find a welcoming space with natural lighting, and arrange chairs in a circle.

Open the meeting by explaining its purpose along with the desired goals and outcomes.

Explain protocols for the meeting, and ask for agreement. For example, will people take turns talking? Is it OK to interrupt another speaker? Will everything said be confidential? When will the meeting end?

Invite everyone in the group to say something — perhaps by having them each respond to a question. Suspend judgment, making sure all people feel heard, needed, and respected.

Keep all participants engaged in conversation, allowing space for differences of opinion. Nurture the emergence of something new.

Commit to action. Ask people to speak briefly about the specific commitments they're ready to make as you all move forward to a common future.

Evoke Group Wisdom

Wisdom circles are a great way to get to the heart of the matter. Here's how they work:

- Pull chairs into a circle with no table in the middle.
- Have each person speak in turn, moving clockwise around the circle. Anyone may "pass" at any time; no one should be forced to speak.
- Allow a pause between each person speaking.
- Listen and ask questions rather than giving advice or "the answer."
- Listen deeply for the wisdom that is emerging.

The Key to Sustainability: Mission-Based Fundraising

Terry Axelrod and her team have taught the Benevon model of funding to more than 4,000 organizations over 16 years. While it was a solid fundraising method from the start, Axelrod has learned some lessons over the years and tweaked the technique to make it even more effective.

Now she offers us the complete model in her latest book. *The Benevon Model for Sustainable Funding* (benevon.com), designed for small to mid-sized nonprofits, does a comprehensive job of explaining how to use the model.

The most important aspect of the Benevon strategy is that it's mission-focused. Every activity revolves around and contributes to the organization's purpose, and that purpose is relayed clearly and succinctly.

You can see how this model works by looking at your fundraising events. Does every one of these events clarify your organization's mission for participants? If not, those events aren't creating sustainable funding. Axelrod suggests ways to "bless and release" such events or convert them to more mission-focused fundraisers.

She also stresses the importance of gaining organizational buy-in and assembling a good team to manage the model. After all, it may require a major shift in fundraising practice within your organization.

It's not a cookie-cutter method. Flexibility is built in to let you adapt the procedures to your own circumstances. At the same time, the components of the model rely on one another, so the more you stray from the basic steps, the more likely that results will diminish.

Unless your organization is willing to try a new, innovative model of fundraising, this book isn't for you. If your organization — as a team — is willing to make individual giving more sustainable, however, read and share this book throughout your organization. If you already use the Benevon model, this book is an excellent reminder of the value of each tool and the overall model.

A key undertaking in the Benevon model is to hold a Point-of-Entry Event. You can invite anyone and everyone to this free, one-hour event. The point is to inspire them about the work your organization does.

The first part of planning your event is to "choose your buckets." This tactic will help you describe the impact of your programs in a concise, understandable way. To do so, follow these steps:

- **Pretend you have three buckets.** Divide all your programs into one of the three.
- **Name each bucket.** Choose a name that encompasses all the programs inside the bucket.
- **When you add the three bucket names together, you'll have a powerful tag line** that sums up your organization's work for people. Examples of three-bucket names:
  - Nurture the spirit. Educate the mind. Transform the community.
  - Protect, restore, and preserve the environment.
  - Help people find jobs, housing, and transportation.
  - Support individuals. Strengthen families. Build community.

Your "bucket list" will provide a framework for newcomers to your organization. It will make your mission engaging and clear.

At the event, give people a "tour" — whether actual or virtual — of your mission. This tour (led by a volunteer or board member) should include three stops, one for each of your three buckets. At each stop, tell a story about how your organization changed someone's life. Your guests will be inspired to give and pass on the word about your organization's work.

—reviewed by Terrence Fernsler

What Magic Can Teach You

Magicians have long used their knowledge of the brain to create amazing illusions. You can use that same knowledge as you interact with others, make decisions, and build your organization. Here are some of the lessons magicians can teach us:

- **Never try to do more than one thing at once.** Magicians know how easy it is to confuse people by distracting them. The same is true if you try to talk on the phone and check your e-mails at the same time. Chances are, you'll do neither task well.
- **Use humor and compassion to disarm others.** Magicians know that if they can get the audience to laugh and empathize, they'll lower their guard.
- **Don't let mistakes derail you.** Magicians blunder all the time, but the audience almost never notices because they set their mistakes aside and keep moving forward with confidence.
- **Magicians know how fallible memory is.** They often tell us what happened a few minutes ago, and we don't even realize they've changed some of the details. That's why it's so important for you to keep records of important information and conversations immediately after they happen.
- **When you pay attention to one thing, you ignore other things that are happening right in front of you.** Remember this whenever you're making an important choice, such as who to work or partner with. Focus on each portion of the decision, one at a time, fully and carefully, and don't let yourself be swayed by one detail (such as someone's charisma).

For more, see *Sleights of Mind: What the Neuroscience of Magic Reveals about Our Everyday Deceptions* (Henry Holt and Company, henryholt.com, sleightsofmind.com).

Is the 80/20 Rule Shifting?

A new fundraising survey by the Evangelical Child and Family Agency (ECFA, www.ecfa.org/content/surveys) suggests that "moving donors up the giving pyramid" is the main fundraising effort that needs to be fixed, and indicates for the first time that the "80/20 rule" is tilting.

The longstanding "80/20 rule" that 80% of gifts are given by 20% of donors was confirmed by only 23% of respondents (nonprofit CEOs and development officers), while 30% report a 75/25 ratio. This change requires new fundraising strategies to appeal to a broader swathe of donors.

A slight disconnect was noted in data about impact measurement. Almost 72% agreed or strongly agreed their donors are very interested in the impact measurements of their programs, products, and services, yet only 61% communicate these measurements externally.

The most frequent answer to the open-ended question "What area of your fundraising is keeping you up at night?" was donor acquisition. (Several indicated, thankfully, that their concerns don't rise to the level of preventing sleep!)

Practical Ways to Unplug Yourself & Your Workplace

You can't be at your productive, creative best when you're busy managing technological distractions, as so many of us are. *Hamlet's BlackBerry: A Practical Philosophy for Building a Good Life in the Digital Age* (HarperCollins, harpercollins.com) offers ideas for creating a meaningful life in our overly connected era:

- **Don't assume that the newest tool is the best one for your task.** Sometimes older devices will work better, and playing with old tools can relax the mind and mitigate information overload. Holding a book or magazine in your hand, for instance, has a centering effect you won't find online, on TV, or in an e-book. Writing someone a letter instead of an e-mail connects you in a completely different way. Collaborating with others and forming teams are time-tested tools that outperform any software you can find.
- **Spend some time each day away from all your gadgets.** Take a walk, and leave your smart phone behind. Do something that absorbs you, like gardening, cooking, swimming, or playing an instrument.
- **Pay complete attention to one thing at a time.** Have a one-on-one chat with someone, and really listen.
- **Consider an "Internet sabbath" — one day a week** that you turn off all your phones, TVs, computers — everything — and enjoy the peace.
- **Institute "quiet time" in the workplace** — four hours every week in which e-mail is shut down and phone calls go straight to voice mail.
- **Encourage people at work to talk to one another in person** instead of by e-mail whenever possible.
- **Organize meetings in which you and your colleagues trade tips** about gaining control over technology, simplifying your lives, and homing in on what's really important.

Measuring Accountability in Nonprofits

Even though the importance of accountability is widely acknowledged, nonprofit managers tend to give it short shrift. Explorations into this complex subject are always welcome, and *Acountability and Effectiveness Evaluation in Non-Profit Organizations* (Routledge, routlege.com) is an especially revealing look at the subject.

The authors, James Cutt and Vic Murray, explain how they set out to persuade senior staff in a group of human service organizations about the benefits of developing accountability information. In the process, they learned what was working and what wasn't, and discovered, to their surprise, the political aspects of evaluation.

Their early research led to the creation of logic models with associated outcome measures and methods of evaluation. The Balanced Scorecard is a logic model that they found useful in establishing accountability in nonprofit planning and reporting. They explain the application of the Balanced Scorecard in evaluation. The Canadian government has a widely-used framework for evaluation; the authors adapted this model into a modified Balanced Scorecard approach to better establish accountability. After taking the reader through each step of their research, they conclude with lessons learned along the way.

This explanation of their research is intended primarily for academics and evaluation professionals. Yet, if you can sort through the scholarly language, it can help you clarify what should be evaluated and how to do so to improve your organization.

The book will open your eyes, as it opened the eyes of the authors, to the political frame of evaluation, especially the power dynamics between the evaluator and evaluatee. It's a fascinating, honest look at tools for improving the effectiveness of nonprofit organizations.

—reviewed by Terrence Fernsler

How Does Social Networking Impact Your Mission?

Nonprofits' use of social networking is often still experimental. Measuring the effectiveness of social fundraising is in its infancy. Still, in *Measuring the Networked Nonprofit* (wiley.com), Beth Kanter and Katie Delahaye Paine have come up with thoughtful ways to calculate the impact of social media on mission.

Just adding up numbers isn't enough. The right kinds of assessment can help your organization use social networking to change the world intentionally, not just through luck. Connecting with people and building relationships — what social networking is all about — are important tools for social change. This book demonstrates how gauging online relationships — through deepening commitment — affects outcomes offline.

The authors learned from experimenting with measures themselves. They offer simple steps to appraise what matters. Their advice is useful for all types and sizes of organizations, no matter their capabilities and levels of social networking use. Sometimes the lessons learned from measurement will be dramatic, sometimes incremental.

Social networking isn't just a shiny new gadget; with measurement, it becomes an important tool for social change. Assessing results can help you decide which methods to keep pursuing and which to drop. Careful, planned, continuous measurement will help your organization become both more efficient and more effective.

Social fundraising is difficult to measure because it's rarely used alone. It's almost always found in combination with other fundraising activities. To isolate the impact of the social fundraising component:

- **Put thought into choosing your metrics.** Social fundraising drives behavior in many ways. For example, you might calculate the percentage increase in:
  - frequency of donations
  - number of donors
  - size of donations
  - number of first-time donors
  - time between donations
  - number of new volunteers
  - size of your network
  - cost per donor acquired.
- **Create a tracking system** to follow each of the metrics you choose.
- **Roll out your fundraising campaign in phases** so you can measure various components of success, including social media, at each step along the way.
- Look at as many potential influences as your budget allows.

Social networking shouldn't be viewed as a magic elixir that will solve all your communication issues; it is *one* tool, a tactic that can be used strategically by learning how to measure its effects. There are no better experts to help you do so than the authors of this fine book.

—reviewed by Terrence Fernsler

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Laughing Together

Nothing motivates, reassures, and connects people like shared laughter. Use humor like glue to create unbreakable bonds and teams. *Humor 101* (Springer Publishing, springerpub.com) provides insights into why and how laughter works:

- **Humor is interactive and affiliating.** It enhances connections between people in a way nothing else can.
- **Having a sense of humor makes others like you more.** Surveys show that when people simply say they have a sense of humor, others rate them more positively.
- **You don't have to be a jokester or comedian to get people laughing.** Often it's not the person but the situation that's funny. Just notice your surroundings and let people in on the funny stuff that's always going on.
- **Your style of humor is important.** Those who tell formal jokes, especially "negative" jokes that make fun of people, don't usually create positive bonds and may even break ties with people. Even those who ridicule themselves can be viewed negatively, unless they hold very high status in the group. Men who tell jokes at someone else's expense can make women view them as hostile, violent, and cruel. The best humor for knitting people together is the informal the kind that allows everyone to laugh at a situation they all have in common.
- **A sense of humor is one of the traits people want most in their leader.** Positive humor correlates with employee satisfaction (although "negative" humor, especially aggressive jokes that target others, does just the opposite and causes employees to rate such leaders as less capable and effective).
- **During times of change, humor is especially crucial.** It heightens motivation, relieves stress, and builds trust. People are much more willing to follow a transformational leader through the change process when a dash of humor is added to the mix.
- **Take care when writing, e-mailing, phoning, or otherwise connecting with people when you can't see their faces.** The essence of humor is often lost in such communications and can even offend and alienate people.
- **Be wary of using sarcasm and irony, which don't translate well,** especially between people of different cultures, ages, and backgrounds.
- **What's needed more than jokes is a sense of fun and playfulness in the workplace.** People often laugh for no other reason except that they're happy. Just hearing someone chuckle or seeing someone smile is enough to improve people's mood.
- **"The best way to get funny," says author Mitch Earlywine, is to "see that life is funny."** The way to do that is to be in it right now. Then there's no joke to tell. Instead, there's the shared laughter that says, "We're all human, living an amazing, hilarious existence on this crazy earth!"

Boon or Curse? It's Up to Us

Our technological world is bringing us together and tearing us apart at the same time, as the authors of *Mobile Communication* (Transaction Publishing, transactionpub.com) attest. Edited by Rich Ling and Scott Campbell, the 348-page book includes essays by scholars from around the world, who provide valuable insights into how we can use our gadgets to increase social cohesion.

But, they warn, take care not to use your devices to replace face-to-face interactions. If you do, you may increase your feelings of isolation and division.

Are You Ready for the Cloud? Use This Checklist to Be Sure

With interest in cloud computing moving past the early-adoption phase, many nonprofits are moving their systems to the cloud. There are many benefits to be derived from cloud computing — including reduced complexity, lower IT support costs, and unlimited scalability.

But moving to the cloud can be complex, and you need to proceed carefully. To help with the process, UNIT4 Business Software (Unit4software.com) has developed a checklist of five questions that nonprofits should ask to ensure success.

1. **Have you defined the scope of your move to the cloud?** The first decision is whether to move all your systems in one go or start with non-core components before looking to move your Enterprise Resource Planning (ERP) system. A hybrid approach to cloud computing is often ideal if you use highly configurable systems which have been designed to meet your specific needs. In that case, movement to the cloud will likely be gradual.
2. **Is your current system agile enough to cope with changing requirements?** Not all ERP systems are created equal — especially in the case of cloud versions. Some ERP solutions have one version for on-premises deployments and a different "lite" version for the cloud. Be certain you're not giving up any flexibility or functionality when you move to the cloud version. In particular, be sure that when you need to make changes to your system in the future, your cloud solution doesn't create barriers to action.
3. **Have you prioritized which data to move?** Do you need to move all historical data or can you pare it down to the information that's vital for running the organization today? There are no hard and fast rules. Many nonprofits assume they should retain mission-critical data in their own on-premises data center, thinking it will be safer there. Actually, however, serviced cloud data centers are highly secure with all the state-of-the-art systems to ensure reliability, security, and performance.
4. **What service and security considerations do you need?** Whatever the promises of cloud computing, it's important that you know what's happening in the cloud, how your applications are being delivered, and how traffic is being controlled and directed. Evaluate the cloud provider's security capabilities, reliability history, and privacy clauses, including their back-up and recovery programs and service level agreements. Service providers should openly share the results of internal or external security audits, as well as statistics on security incidents (such as data breaches or downtime) and security certifications.
5. **What Disaster Recovery (DR) plans do you need?** Ask your potential cloud provider about its disaster recovery offerings to ensure continuous availability, maintain operational continuity for your organization, and insure against the loss of critical infrastructure and data. You should know when information is moved to another data center and be kept abreast of uptime and physical location of data storage.

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Drop us a note at: Letters to the Editor, Nonprofit World, P.O. Box 44173, Madison, Wisconsin 53744-4173.

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Please include your name, organization, address, phone number, and e-mail address. If you'd like your comments to appear anonymously, please let us know. We look forward to hearing from you!

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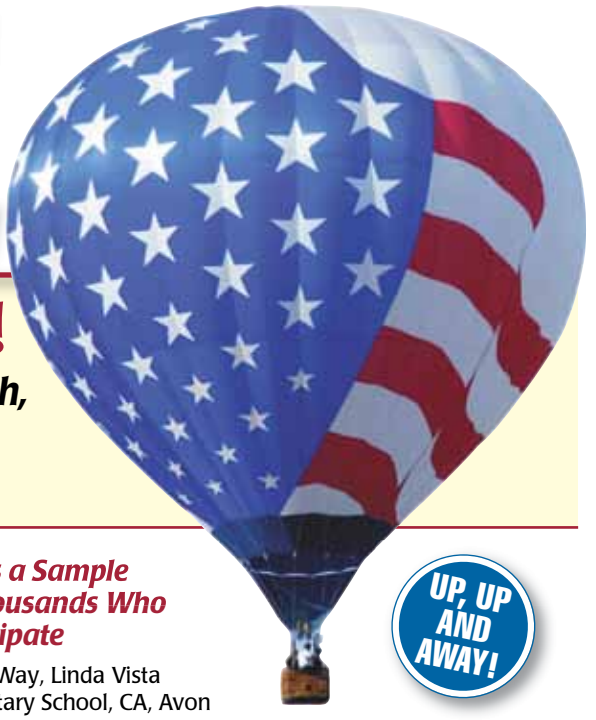

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