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# Nonprofit World

Advancement  
Through  
Sharing

## Connecting through the Camera & Keyboard Improve Your Virtual Get-Togethers with These Pointers



## NONPROFIT WORLD

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## FEATURE STORY

The virtual world takes some adjustment from you and your team. You need new skills to be efficient and compelling when communicating by video. It's tricky to keep people focused and engaged when there are so many ways for them to get distracted from the video message. **"Connecting through the Camera & Keyboard"** (page 16) gives you guidelines. May your next online meeting be a smashing success!

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# Face to Face, Eye to Eye

**O**ur wonderful new technologies have stunted our ability to pay attention to the real world. Bombarded by messages and data, we sometimes find it impossible to focus.

Our brains aren't designed to juggle so many bits of information (take a look at "Gain Freedom from Technology," page 30). Our brains are hardwired to focus on building relationships. And these meaningful interactions can happen only when we meet face to face, eye to eye.

When you can't get together in person, videoconferencing can work nearly as well. But video get-togethers can be worse than not meeting at all, if you're not careful. They can sap your energy, leaving you unable to perform vital tasks. "Zoom Exhaustion Is Real" (page 31) offers pointers to keep you alert and productive.

Another problem with video is that it's easy to get distracted. "Nothing says multitasking opportunity like a web-based meeting," points out Kate Zabriskie. She provides solutions in "Connecting through the Camera & Keyboard" (page 16).

Young workers, in particular, are so used to communicating through their devices that they don't always understand the nuances of human interaction, such as paying attention to body language and other signals (check out "To Make an Impact, Improve Your Non-Verbal Awareness" on page 22). Some have never learned the skills that older generations consider common sense – things like dependability, conscientiousness, social graces, and thoughtful communication.

These abilities, called "soft skills," are associated with emotional intelligence (EQ). People with high EQ are able to monitor their own and others' feelings and use this information to guide their actions (find more in "Lead with Emotional Intelligence" on page 33).

"Hard skills," on the other hand, are associated with IQ (intellectual potential). They're more technical and easily measured than soft skills. Hard skills, like math and science, are taught in school, while soft skills rarely are.

Yet it's as important to know yourself – one of the soft skills – as it is to know how to do your job. EQ is a better predictor of success than IQ.

So, what can you do to help workers in your organization gain the soft skills so necessary for success? You can teach them. In *Bridging the Soft Skills Gap*, Bruce Tulgan explains how to help people practice soft skills until they become automatic. New habits come from repetition (see "Make Trustworthiness a Habit" on page 33).



**“The brain isn't designed to juggle so much information.”**

Sometimes you'll need to spell out rules that seem obvious to you, such as "Turn off your phone during meetings" and "Don't interrupt when others are speaking." Never assume that "everybody knows this." No one comes out of the womb understanding the ABCs of human interaction. (Take a look at "Unlocking the Power of Soft Skills: The Missing Basics in Today's Workforce" on page 18.)

Another under-rated soft skill is luck. Rather than a random occurrence, luck is something you can nurture. "The Art of Luck" (page 32) explains how to become luckier.

Mastering soft skills is a crucial part of adapting to change. "Overcome People's Resistance with These Steps" (page 26) shows how to help everyone in your organization make that important shift. The result will be happy, productive employees. Great leadership is the way to get there.

*Jill Muehrcke*

Jill Muehrcke, [muehrcke@charter.net](mailto:muehrcke@charter.net)

## Five Things to Do Next Monday

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

- 1. Take the quiz** in "Your Soft Skill Checklist" on page 19 to be sure you have the "right smarts" to be an effective leader.
- 2. Check to see if your website** has all 10 things donors want (page 6).
- 3. Take the first step** toward using phones to make money ("Dialing for Dollars, Reinvented," page 8).
- 4. Help your younger workers improve their body-language skills** by sharing the article on page 22.
- 5. Adapt your fundraising approach** as outlined in "Asking for Funds in Uncertain Times" (page 31).

# Whiteness & the Nonprofit Sector

## Are white nonprofit leaders in the wrong roles?

By Tegan Lecheler

**N**onprofit organizations are often lauded as “the good ones,” the organizations doing the grueling work required to further social equity and repair the damage left in capitalism’s wake. This is a comfortable and blissful idea, one that makes us feel good about having chosen to dedicate our lives to the nonprofit sector. The reality paints a different picture, and it’s one overlooked by many of us pursuing jobs in the field.

A study by Community Wealth Partners ([communitywealth.com](http://communitywealth.com)) found that 87% of nonprofit executive directors or presidents are white. This is not at all representative of the clientele these organizations serve and has turned the modern nonprofit organization into a vehicle of white supremacy. Whiteness perpetuates whiteness, and organizations that have mostly white staff will continue this patterning because of the toxic environment and biased recruitment it creates.

I have applied for jobs that should have been filled by a BIPOC (Black, Indigenous, Person of Color) individual and I have taken roles that should have been filled by a BIPOC person. We all have. But we can’t do it any longer.

White allies, if we are ever going to further racial equity and make even the smallest dent in systems of oppression, we need to be more intentional about the roles we are taking. A nonprofit organization’s leader must reflect those accessing the organization’s resources. Surely this is a radical proposal and the idea that we might jeopardize or step away from our careers in the name of equity may seem preposterous, but white folks can no longer take up space not meant for them, including but not limited to the head of certain organizations.

I am fiercely passionate about ending homelessness and have dreamt for years of being the executive director of a nonprofit organization with this mission. I even enrolled in a master’s program studying nonprofit leadership so that I might one day be qualified for my dream position. As I’ve navigated the nonprofit sector, however, I’ve discovered that this is not my role to play. I do not come from poverty, I have never experienced homelessness, and I am not a part of the demographic that housing insecurity most severely affects. Running this type of organization is simply not my place.



It’s hard to consider that the most helpful thing you can do for a movement you’re so passionate about is to step aside, but that’s not to say we must sit idly on the sidelines. Instead, white allies, let us fund BIPOC led organizations. Let’s listen to leaders of these organizations who tell us what they need, and then let’s do that.

White people absolutely play a role in these movements and organizations, but sometimes it’s not the starring role, and that can be a tough truth for us to face. For white people committed to racial justice, there’s the individual, and then there’s the greater goal of weakening white supremacy. These positions are often at odds and require conflicting behavior.

As we begin applying for jobs and looking for our dream positions, I hope we can remember our role. Ask yourself and the organization’s hiring manager what demographic the organization serves, and how representative the staff are of this community.

By taking this job, are you serving yourself, the individual, or the greater mission of dismantling dominant culture? In what way can you be useful to the movement without colonizing workspace or perpetuating violent systems? There’s a role for everyone in the nonprofit industry; the key is to find the one right for you. 

*Tegan Lecheler ([lecheler.tegan@gmail.com](mailto:lecheler.tegan@gmail.com)) is a nonprofit professional working toward her master’s degree in Public Policy and Public and Nonprofit Management and Leadership at the University of Minnesota’s Humphrey School of Public Affairs. She is a passionate lover of people, disrupter of systems, and coffee addict.*

“White folks can no longer take up space not meant for them.”

# How Can You Keep Your Remote Workers Productive?

Here's a primer for leading and motivating people when they work from home.

**Q** Everyone in our organization is now working from home. I've been pleased to find that this way of working has many efficiencies and other benefits. But my worry is that, without daily contact, people may lose motivation. How can I help them stay energized and focused on the right things?

**A** Just like any other change, a shift to a work-at-home policy will take some adjusting for you and your team. Here are a few ideas that will make things run smoothly.

**Up your frequency of one-on-one check-ins.** Here's where video is so helpful. You want to be able to look people in the eye when you ask them how they're doing. You can glean a lot more that way than through e-mail or the phone.

**Over-communicate your most important priorities.** To make sure a vital message sticks, use as many different techniques as possible to reinforce it. For example, you can start the day with a quick team huddle (over video of course). Then follow-up with a recap e-mail.

**Encourage people to work together (without you).** When everyone is remote, it's easy for you to become the hub for all communication – which of course is a huge time suck for you and a missed opportunity for them. Assign people to work on projects together (over video). Encourage brainstorming and best-practice sharing (over video). Consider assigning collaborative homework in advance of your team meeting or huddles.

“The human connection is more vital than ever.”

**Be sure you're deliberately asking your team** for their best thinking for ways to work effectively in this new environment. Ask them, often, what's working and what more they need from you and from one another. You can't ask questions like this too many times.

**Look for creative ways to reinforce key messages**, such as starting an internal podcast.

**Formalize informal communication.** When you're in an office it's natural to connect first before jumping into work. “How was your weekend?” “What do you think of this weather?” When everyone is working remotely, it's tempting to skip the small talk. Be sure to find ways to communicate at a human level.

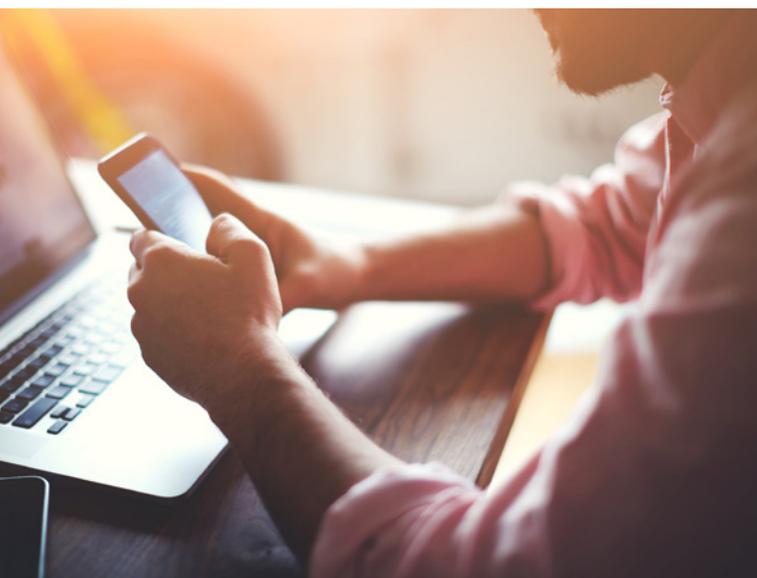
**Learn the art of great remote meetings.** Take time to establish new norms for your remote meetings. Find ways to be sure everyone participates. For example, send out a question beforehand by e-mail so people have a chance to ponder it, and then begin the meeting by asking for people's answers. For example:

- What's the most important thing you're working on? How can we support your success in this area?
- Who went out of their way to help you recently, and why was their input so helpful?
- What's one aspect of your job that frustrates you? What's one idea for making that easier?
- Where's one area where you would like more feedback from this team?

Questions like this will build trust and help people open up. (For details on virtual meetings, see “Connecting through the Camera & Keyboard” on page 16.)

In summary, the keys to remember are: (1) Communicate far more than you did when people were seeing each other in person. (2) Mix it up with as many different ways of communicating as you can. The human connection is more vital than ever when you're no longer talking in person. 

— Karin Hurt, *Let's Grow Leaders*, [letsgrowleaders.com](http://letsgrowleaders.com)



# Getting Your Board Prospect off the Fence

Avoid board-candidate limbo with these simple steps.

By Karen Eber Davis

**T**oday's the day. You're going to ask a candidate you've vetted and wooed for months to serve on your board. You've planned what to say if the answer is yes or no. But how will you respond if your prospect tells you, "I want to think about it"? How will you graciously allow think-time but avoid holding space open "just in case" while the candidate slowly disappears off your radar screen?

You pursue new candidates for what they can offer your organization. Without their help, your organization will miss out on valuable resources and contributions. A full board lets you maximize your impact. Full boards have one less excuse for waiting to discuss critical agenda items, such as ensuring adequate money to fund the mission.

While you value any candidate's willingness to think over your request, how might you avoid relationship limbo, hoping they'll call and wondering if it's too soon for you to follow up?

## Throw a lasso into the future.

Establish your next step along with your board prospect. The next step is your lasso, a specific date you mark on your calendar.

Let's imagine your prospective board member has thanked you for your offer and asked for time to think it over. You could leave this open-ended. But a better idea is to lasso the future, offering options such as, "After you think about it, would you like me to:

- **call you** next Monday?"
- **e-mail you** Friday?"
- **set up a time now** to have a video chat next week?"

## Don't let prospects leave without a firm date.

If your candidate hedges, toss a lasso around a date. For instance, if they say they'll get back to you, respond, "Great, you'll call me and let me know. Because we all get so busy,

“Establish your next step along with your board prospect.”



"I'm making a note in my calendar to call you by next Friday if I haven't heard from you."

When you have a time and action in your planner, you lasso the future.

In rare cases, a candidate may bristle at your insistence. If that happens, say something like this: "I've told my board that I'll recruit new candidates this month. I'd love to have you join our board, but I understand it may not work out. Whatever your decision, I hope we can stay in contact."

If you're unable to lasso the future, make the decision to move on. Jot a note on your calendar indicating the date that you'll start contacting other prospects. **S**

*Karen Eber Davis (karen@kedconsult.com) is an expert in maximizing philanthropic impact. She is the author of 7 Nonprofit Income Streams: Open the Floodgates to Sustainability! and Let's Raise Nonprofit Millions Together. Sign up for her free newsletter "Added Value" at kedconsult.com.*



## Make Your Board the Best It Can Be

Choose the best people to lead your organization, using insights from these articles (NonprofitWorld.org):

**Where Can You Find Good Board Members?** (Vol. 17, No. 5)

**Defining Your Board's Needs** (Vol. 26, No. 1)

**How to Prepare Board Members to Govern Effectively** (Vol. 25, No. 6)

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

**Leading the Transformation of Boards** (Vol. 22, No. 2)

**Look Beyond Tradition to Diversify Your Board** (Vol. 22, No. 4)

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

**Harness the Power of Termed-Out Board Members** (Vol. 37, No. 4)

# Top 10 Things Donors Want from Your Website

Are you giving people what they want when they visit your website?

By Gail Perry

**M**ost donors check out your website before they make a gift. And they do this whether they're giving online or through the mail. Are you giving them easy access to what they want? Be sure you include all of the following:

## 1. Easy navigation

When someone comes to your site, don't make them have to think too hard or hunt too much for what they want. Make everything clear, plain, and easy to read and understand. Use a startling headline or a vivid image to engage your donor quickly. If your navigation is confusing, you'll probably lose your donor.

## 2. Lots of pictures and fewer words

Terrific photos tell your story visually. And on your website, images are more compelling than words.

Your donors are skimming, skimming – quickly, quickly. Lots of words, cumbersome phrasing, and crowded text will drive them away. Verbosity can kill you on a website. Let great pictures do the talking.

## 3. Links to your Guidestar and Charity Navigator profiles

Donors today want to check out an organization's overhead costs before they donate. They're obsessing over administrative expenses.

Yes, it's crazy. How can you run a nonprofit without admin costs? And we do need to educate donors on the importance of investing in infrastructure – it keeps the lights on, pays for staff and computers – so we can run our programs. We shouldn't apologize for our admin costs. Instead we need to re-define the words “overhead costs” into “investing in infrastructure.” Once we explain this to donors, they do understand.

But they still want to know how much of the money you take in goes to programs and how much goes to infrastructure, and you need to give them direct access to this information. Doing so will build trust.

“If your navigation is confusing, you'll probably lose your donor.”

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## 4. Credibility

Since donors are more mistrustful of institutions and organizations these days, convey credibility by sharing:

- measurable numbers about your impact (how many people did you serve, and how much did it cost you to do it?)
- your track record – successes
- endorsements
- your board members' names (who's standing behind this organization, and who's accountable?)
- testimonials.

## 5. A clear call to action

Donors are in a hurry. If they come to visit, by all means tell them what you need them to do! You should have a call to action in everything you do, everything you send out, and on every web page.

## 6. An easy way to donate

Don't make your donors work to find out how to give. Don't make them search. Put the “Donate Now” button clearly where they can find it. Show them it's easy. Or you may lose them.

## 7. A simple donation form

Research shows that a large majority of people abandon donation pages. As many as 96% of people visit the page but never complete the form, according to studies.

Just think how many times you've loaded up a shopping cart in an online store and never completed the checkout process. What made you change your mind? What might change the minds of visitors to your website?

Consider this: Every box donors have to fill in increases their impatience with the process. And if they get to the point of frustration, you've probably lost them.

## 8. A page titled “Your Gifts At Work”

Donors have changed. They're much more focused on the impact of their gifts. They want to know exactly where their money is going and how it's being used.

Use pie charts to show where your funding comes from and where it goes. This is what transparency means: sharing the details of how much money you're raising and what you do with it. And transparency is what every donor wants.



## 9. Interaction

Donors want to have a dialogue with you. Give them the chance to comment, discuss, learn more about you, and tell you about themselves. Ask them to take brief surveys, post their opinions, volunteer for your organization, or take some action.

Always ask for more than money. Treat prospects like real people, not like they are wallets.

## 10. Physical address and phone

It's startling how hard it often is to find a darned phone number or street address. What's with it when a nonprofit doesn't include this essential info?

Give your donors easy access to you. Be welcoming. And they will reward you. 

*Gail Perry inspires nonprofits around the world with cutting-edge fundraising strategies and new tools to make fundraising more successful and more fun. Find smart strategies to help you raise tons of money at Fired-Up Fundraising (gailperry.com).*



## please get in touch...

We would love to hear your response to anything in **Nonprofit World**, your comments about any aspect of the nonprofit sector, and your concerns about your daily work. Please get in touch in any of the following ways:

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

**E-mail to:** [muehrcke@charter.net](mailto:muehrcke@charter.net)

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!



## WHAT'S UP ONLINE?

Would you like to discuss some of the issues addressed in **Nonprofit World** with other nonprofit professionals? Do you have questions to ask or expertise of your own to share?

Society for Nonprofits is actively engaged on LinkedIn, Facebook and Twitter. Find us on your favorite social media platform by visiting **[social.snpo.org](http://social.snpo.org)**

If you have any questions, contact Jason Chmura at [jchmura@NonprofitWorld.org](mailto:jchmura@NonprofitWorld.org)

## Get Ready for More Online Gifts

Be even more welcoming to donors and prospects with the guidelines in these articles at NonprofitWorld.org:

**Simple Tips to Nail Your Online Fundraising** (Vol. 38, No. 1)

**Create a Donation Page that Rocks** (Vol. 33, No. 1)

**The Five Biggest Website Mistakes Nonprofits Make – and How to Avoid Them** (Vol. 29, No. 5)

**Wow People with Your Digital Material** (Vol. 34, No. 2)

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

**Ignite Passion by Connecting Online** (Vol. 34, No. 4)

# Dialing for Dollars, Reinvented

Use phone banks to engage donors and raise more money.

By *Andy Robinson*

**When was the last time you picked up your phone, called a donor, and asked for a gift?**

**Let me guess: Not recently enough.**

**S**adly, the telephone has developed a poor reputation as a fundraising tool. We're challenged by voicemail, caller ID, people screening calls, donors ignoring their phones altogether – and, of course, all the fears about asking for money.

And yet, there's the power of the human voice – one person actually talking with another, trading stories, and sharing what they care about.

So I was thrilled to learn about a modern spin on the fundraising phone-a-thon – one that embraces new technology and uses it to great advantage.

## Fall in Love with Phone Fundraising

Imagine a half-dozen people in remote locations, connected by the online platform Zoom (zoom.us) – so they can see each other, hear each other, and prepare together. Now imagine them all muting their computers, picking up their phones, and calling donors – all at the same time, and in plain sight of each other.

That's the way they do it at Training for Change (trainingforchange.org). We talked to the people there to see why they love phone fundraising and how they help their board, staff, and volunteers participate. Thanks to Zein Nakhoda (staff) and Sonia Silbert (board) for sharing their phone-bank story.



“There's great power in the human voice.”

## The Phone Can Build Relationships

**Q: Tell us about your group.**

**A:** Training for Change is a training organization for activists and organizers. We believe strong training and group facilitation is vital to building movements for social justice and radical change. We train thousands of people each year across issues and sectors – from holding retreats for community groups to teaching skills for immigrant-rights groups resisting deportation.

**Q: Why did you choose phone banking as a fundraising strategy?**

**A:** We have a very relational culture. We value relationships with groups we've worked with, workshop participants, and grassroots donors. Phone banking creates an opportunity to have a personal conversation – to share what's new, learn about our supporters, and ask for donations.

**Q: Who did you call? Were they notified in advance?**

**A:** We called recent donors and workshop participants, after announcing the phone bank through our e-news.

## Solid Logistics Lead to Success

**Q: Describe the logistics of setting up the phone bank through Zoom.**

**A:** We conducted the phone bank using PowerBase (ourpowerbase.net), a web-based donor-management platform. Using PowerBase along with our own database of donors, we were able to create call lists and mark donor responses directly in our records. This required very little data entry.

Before launching the phone bank, we assembled and trained a team of volunteers – board members, trainers, recent donors, and workshop participants – to join us on the phones. We scheduled 12 two-hour call shifts, spread over a month. Most shifts were weekday evenings; some were Saturdays mid-day. A staff member or volunteer leader hosted each shift.

Volunteer callers and hosts joined a Zoom video conference room. We used this platform to provide training, troubleshoot

the donor list, and share progress. When making calls on our phones, we muted ourselves on Zoom but were still virtually and visually together, phone banking as a team.

## Train Your Callers!

**Q: You're a training organization first and foremost. How did you train your callers?**

**A:** We followed a series of steps:

1. We sent volunteers a short video showing how to use PowerBase.
2. At the start of each shift, hosts demonstrated the software and answered questions.
3. We provided a call script for people to use and adapt. The script included information about our programs, instructions on how to donate, and suggestions for making an ask.
4. After an hour, we did a mid-point check-in to share fundraising totals. Callers also used this check-in time to exchange tips.

**Q: How did the call lists work?**

**A:** Call lists were generated through PowerBase. When a volunteer caller signed on, they would see a batch of 15-20 people to call. After each call they would mark the result, such as “Left a voicemail,” “Wrong number,” or “Yes, will donate!”

Callers asked for pledges. We didn't collect credit card information by phone, but rather encouraged people to donate online by credit card or mail us a check.

After each shift we tallied pledges. Staff sent follow-up e-mails to pledgers with a reminder about how to donate.

## Measure Your Outcomes

**Q: Were you happy with the results?**

**A:** When we first started our fundraising campaign, we set a campaign goal of \$10,000. Before launching the phone bank, we had raised \$3,500 from major donors to kick-start the campaign. We raised an additional \$7,564 through the phone bank, e-news, newsletters, social media, and word of mouth, for a total of \$11,064. Victory! Four out of five donations ranged from \$5 to \$75. So, yes, we were happy with the results.

We were also happy with the way the phone bank sparked the enthusiasm and engagement of people in our organization: 40 volunteers – including every board member and many

“Phone banking creates personal relationships.”

of our trainers – filled 60 caller slots. We called roughly 1,000 people, left a lot of voicemail, and talked with 250 people – a 25% contact rate.

## More Conversations = Better Results

**Q: Next time, how will you make it better?**

**A:** More conversations, fewer voicemails. One challenge is that donors see the phone number of a volunteer without knowing that we're calling on behalf of Training for Change. We'd like to use more text messages and find other ways to reach potential donors. Some people pledged but never donated. We might encourage them to donate while we have them on the phone, or find other ways to make it easier to follow through.

## Together, We're More Effective

**Q: What was the best part of the experience?**

**A:** Hosting call shifts through video conference was a blast! Asking for donations can be challenging; doing it as a team gave everyone a confidence boost.

This was also a great tool for skill-building, as callers shared tips in real time. Callers' team spirit sometimes kept them talking on Zoom long after the shift ended. It was fun for them to catch up and share stories with one another.

All in all, phone banking is a great strategy. Try it, and see how it works for you. 

*Andy Robinson (trainyourboard.com) is a consultant to nonprofit organizations and author of What Every Board Member Needs to Know, Do, and Avoid: A 1-Hour Guide and Train Your Board (and Everyone Else) to Raise Money (co-written with Andrea Kihlstedt).*

## Get Ready to Raise Funds

For more guidance on asking for money, see articles such as these at [NonprofitWorld.org](https://www.nonprofitworld.org):

**The Word You Hear Most Often in Fundraising** (Vol. 28, No. 4)

**Measuring Outcomes in the Real World** (Vol. 30, No. 6)

**We Are Made for Story** (Vol. 37, No. 4)

**Three Keys to Building Relationships in Life (and with Your Donors)** (Vol. 38, No. 1)

**What to Do When Your Potential Donor Says No** (Vol. 36, No. 3)

**Getting Comfortable with the F Word: Fundraising & the Nonprofit Board Member** (Vol. 20, No. 4)

# IRS Proposes UBIT “Silo” Rules for Nonprofits

Proposed rules aim to make things easier for you if your organization owns businesses or certain investments.

By Yossi Ziffer & Chris Moran

**T**he Internal Revenue Service (IRS) has just released some long-awaited guidance for nonprofits. Proposed regulations, issued on April 23, 2020, explain how nonprofits with unrelated businesses or certain investments should calculate their unrelated business taxable income (UBTI).

## Background on Proposed Regulations

Historically, nonprofits measured their UBTI, and thus determined their unrelated business income tax (UBIT) liability, on an aggregated basis. For example, until recently, you could have applied costs incurred in connection with the sale of advertising against the gross income generated from a food service business, thereby aggregating all your sources of revenue and related expenses in computing the total net tax liability at the organizational level.

But that changed a few years ago. Section 512(a)(6) of the IRS Code, amended as part of the 2017 Tax Cuts and Jobs Act, introduced a new UBIT “silo” concept. These silo rules require nonprofits with more than one unrelated trade or business to calculate UBTI separately for each trade or business.

The IRS released temporary guidance in 2018 (Notice 2018-67), directing organizations to rely on a “reasonable, good-faith interpretation” of Code Sections 511 through 514 to determine separate trades and businesses. One “reasonable” method the IRS identified was to use the 6-digit codes of the North American Industry Classification System (NAICS) to designate industry groups.

The problem with that method was that the NAICS 6-digit codes separate trades or businesses into more than 1,000 industry groups. Defining businesses into that much detail would have placed a huge administrative burden on nonprofits and, by extension, the IRS.

For that reason, the proposed regulations instruct nonprofits to use 2-digit instead of 6-digit NAICS codes. The 2-digit codes separate trades or businesses into only 20 different economic sectors such as retail trade, educational services, and so on. By using those broader classifications, the IRS is making it easier for nonprofits that run businesses to determine which code applies and to administer the rules.

## Key Issues Addressed by the Proposed Regulations

### SEPARATE UNRELATED TRADES OR BUSINESSES

The new proposal of using 2-digit codes (discussed above) reduces your administrative burden if your organization has multiple trades or businesses. Furthermore, the use of 2-digit codes lets you combine broadly similar activities when computing UBTI. Thus, you can offset income from one activity with losses from another activity classified within the same broad sector.

### INVESTMENT ACTIVITIES

In another key part of the regulations, the IRS describes exceptions to the silo rules for specific investment activities. The regulations allow you to combine UBTI-generating investment activities that satisfy either a “de minimis” test or a “control” test.<sup>1</sup> (See the next section for definitions of these tests).

If your organization holds an interest in a pass-through entity (such as a partnership, limited liability company, or S corporation), and the extent of your ownership satisfies either the de minimus or control test, then you may aggregate all UBTI that you receive through that pass-through entity – even if those activities would otherwise constitute multiple trades or businesses under the 2-digit codes.<sup>2</sup>

Moreover, if your organization holds qualifying interests in multiple pass-through entities engaged in various unrelated businesses, you may aggregate those pass-through interests as a single business. Thus, all UBTI gains and losses flowing through these interests would be reported together as from a single trade or business.<sup>3</sup>

Conversely, what if your organization holds an investment interest in a pass-through entity but the interest doesn't

“The IRS is making it easier for nonprofits that run businesses.”

“You can obtain a refund of some or all of the UBIT you paid.”

satisfy either the de minimis or control test? Then you'll need to classify the UBIT you receive based on the activities of the pass-through entity, which could result in reporting multiple trade and business categories.

### What Is the De Minimis Test?

Your organization satisfies the de minimis test if you hold directly no more than 2% of the profits and no more than 2% of the capital interest (2% of the stock in the case of interest in an S corporation) in a pass-through entity.<sup>4</sup>

For purposes of the de minimis test, the regulations omit the rule that would have required you to include interests held by board members, other related persons, “supporting organizations,” or controlled entities.<sup>5</sup> Rather, as long as the interests held directly by your organization don't exceed the 2% thresholds, you'll satisfy the de minimis test.

### What Is the Control Test?

The control test is satisfied if your organization:

- (1) **directly holds** no more than 20% of the capital interest (20% of the stock in the case of interest in an S corporation) in a pass-through entity *and*
- (2) **doesn't have control or influence** over the pass-through entity's decision-making.<sup>6</sup>

All facts and circumstances, including the terms of the governing documents of the investment entity, are relevant for determining whether your organization has control or influence.<sup>7</sup>

To determine if your organization's ownership interest exceeds 20%, the interests held by “supporting organizations” or entities controlled by your organization are combined with your organization's interest.<sup>8</sup> However, you needn't consider interests held by board members and other related persons when determining your organization's ownership interest.<sup>9</sup>

### What Is the Look-Through Rule?

The proposed regulations also provide a new “look-through” rule for nonprofits that hold indirect interests in lower-tier partnerships. If your organization doesn't control a partnership in which it holds a direct interest of more than 20%, any lower-tier partnership in which your organization holds an indirect interest of no more than 2% will satisfy the de minimis test.<sup>10</sup>

For example, if your organization holds 50% of the capital interest of partnership X and your organization doesn't control partnership X, *and* partnership X in turn holds 4% of the capital and profits interest of a lower-tier partnership

Y, your organization's interest in partnership Y will be deemed to satisfy the de minimis test (because 50% of 4% = 2%). Thus, any UBIT flowing from partnership Y to your organization will be eligible for the reporting rules for investment activities.

### Can You Rely on K-1 Schedules?

K-1 Schedules can be useful in measuring your organization's ownership interest in a pass-through entity to decide if you're eligible for the de minimis or control exception. You can often determine your percentage interest in the pass-through entity by relying on the ownership percentage listed on the K-1 Schedule you receive from the entity.<sup>11</sup>

However, not all K-1 Schedules contain enough detail for you to measure your ownership interest. Thus, you must use other sources to determine your ownership percentage if the K-1 Schedule:

- **doesn't list** your organization's ownership interest, or
- **lists the interest** as “variable.”<sup>12</sup>

### What Is the Transition Rule?

Notice 2018-67 provided a transition rule permitting you to treat each partnership interest acquired before August 21, 2018 (the date Notice 2018-67 was published) that didn't meet the requirements of either the de minimis or control test as one business for purposes of the silo rules, regardless of whether the partnership or lower-tier partnerships conducted more than one business.<sup>13</sup>

The proposed regulations state that the transition rule ends on the first day of your organization's tax year beginning after final regulations are published.

### ALLOCATION OF EXPENSES

The IRS plans to issue additional guidance regarding how you should allocate expenses connected with one or more businesses, including both your organization's core exempt activities and its unrelated businesses.

Until the IRS issues this guidance, you may allocate such expenses using any reasonable method.<sup>14</sup>

### DEBT-FINANCED INCOME

The regulations allow you to disregard debt financing when evaluating whether a stream of income must be separately “siloed.” Thus, for example, if your organization earns passive income (such as interest, dividends, or rental income from real property) that's subject to UBIT because it's debt-financed, you may group that income with other investment income subject to UBIT.<sup>15</sup>

However, if the income from your organization's debt-financed property would be treated as UBIT even if it weren't debt-financed, then you must treat it as income from a separate unrelated business and use the 2-digit codes to identify it.<sup>16</sup>

For example, if your organization uses debt financing to purchase property and leases the property in exchange for rental income based on a percentage of the lessee's net profits, you must identify the leasing business using the 2-digit codes, because the rental income would be UBTI regardless of the debt-financing rules.<sup>17</sup>

## CHARITABLE CONTRIBUTIONS

One way you can reduce the amount of UBTI you must pay is by making tax-deductible charitable contributions.<sup>18</sup> Rather than allocating these deductions among your unrelated businesses, the regulations allow you to take your charitable deductions against your total UBTI (i.e., after you have computed all "silo" amounts and calculated your preliminary tax liability).<sup>19</sup>

## A Quick Run-Down of Key Terms & Acronyms

**CARES Act:** the Coronavirus Aid, Relief, and Economic Security Act of 2020, which offers tax relief for some nonprofits with unrelated businesses

**Carryback:** A loss that you don't report now but instead deduct from taxable income from a previous year; when you carry back an NOL, you must recompute your new tax liability in that year by taking into account the NOL deduction

**Control test:** the IRS tax rule that gives a percentage you can use to decide if your organization has control or influence over an investment entity; this percentage determines how you'll report your unrelated businesses

**De minimus test:** tax rule that gives a threshold you can use to decide whether you can combine UBTI-generating investment activities

**K-1 Schedule:** an IRS tax form issued annually for an investment in partnership interests; the purpose of the K-1 Schedule is to report each partner's share of the partnership's earnings, losses, deductions, and credits

**NAICS:** North American Industry Classification System; its 6-digit codes divide businesses into over a thousand types, while its 2-digit codes classify businesses into only 20 types; the new IRS rules propose that nonprofits use the 2-digit codes to categorize their unrelated businesses (rather than the 6-digit codes proposed in Notice 2018-67)

**NOL:** net operating loss (a tax credit that occurs when tax deductions of a business are more than its taxable income in a year; this loss is carried forward to offset future profits, thus reducing the business's tax liability)

**Notice 2018-67:** a temporary IRS directive published in 2018; the proposed 2020 rules modify that directive

## NET OPERATING LOSSES (NOLS)

The regulations clarify that you may apply "grandfathered" NOLs from tax years before the 2017 Tax Act ("pre-2018 NOLs") against your UBTI first, before your NOLs from tax years after the 2017 Tax Act ("post-2017 NOLs").<sup>20</sup> You may use your pre-2018 NOLs to offset 100% of UBTI. They'll be deducted from your total UBTI.

By contrast, the deduction available for post-2017 NOLs is limited to 80% of UBTI, and you may use it to offset only UBTI arising from the unrelated trade or business "silo" that generated the NOL.

Pre-2018 NOLs expire after 20 years, while post-2017 NOLs may be carried forward indefinitely. By clarifying that pre-2018 NOLs can be used before post-2017 NOLs, the proposed regulations let you maximize use of your pre-2018 NOLs, which are more useful than post-2017 NOLs.

**Pass-through entity:** a legal entity such as a partnership that passes income on to investors so that the investors rather than the entity are taxed; businesses commonly use pass-through entities (also known as flow-through entities) to reduce the amount of taxes they must pay; the IRS doesn't tax pass-through entities but does require them to file an annual K-1 Schedule

**Post-2017 NOLs:** NOLs from tax years after the 2017 Tax Act

**Pre-2018 NOLs:** NOLs from tax years before the 2017 Tax Act

**S corporation:** a type of corporation to which the IRS gives the benefit of incorporation while taxing it as a partnership

**Silo rules:** rules stating that nonprofits with more than one unrelated business must calculate UBTI separately for each of those businesses; these rules went into effect on January 1, 2018

**Supporting organization:** a charity that carries out its exempt purposes by supporting other exempt organizations, usually other public charities

**Tax Act:** the 2017 Tax Cuts and Jobs Act (also known as the Tax Act or TCJA), passed in December 2017; among many changes to the IRS Code, this Act reduced tax rates for businesses and individuals

**UBIT:** unrelated business income tax; a nonprofit is required to pay UBIT if it runs a business that isn't related to its mission

**UBTI:** unrelated business taxable income (the money a nonprofit receives from running a business that's not related to its mission)

In the wake of the current COVID-19 pandemic, the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) temporarily repealed the 80% UBTI limitation for NOLs arising in taxable years beginning in 2020, thus increasing the economic utility of certain post-2017 NOLs.<sup>21</sup>

Furthermore, the CARES Act permits nonprofits with NOLs arising in 2018, 2019, and 2020 to “carry back” the NOL to each of the five years preceding the NOL. You can thus obtain a refund of some or all of the UBIT you paid in those years.<sup>22</sup>

Since NOLs are carried back to the earliest year in which the organization paid UBIT, some nonprofits will have the opportunity to carry back NOLs arising in 2018, 2019, and/or 2020 to tax years in which the silo rules didn’t apply (i.e., pre-2018 tax years).

On June 8, 2020, the IRS issued a set of FAQs detailing how the UBIT silo rules interact with the temporary revival of NOL carrybacks under the CARES Act.<sup>23</sup> The FAQs clarify that nonprofits may carry back an NOL arising in 2018, 2019, and/or 2020 and deduct it against aggregate UBTI in a taxable year beginning before January 1, 2018 (i.e., before enactment of the silo rules).

## A Brief Summary of the Proposed Regulations

A key benefit of these rules is that you’ll be able to use 2-digit rather than 6-digit NAICS codes to classify your unrelated trades or businesses. The use of 2-digit codes:

- **eases your workload** because there are only 20 industry groups (rather than over 1,000 groups with the 6-digit codes), making it simpler to decide which code applies
- **gives you greater leeway** to offset income from one unrelated business with losses from another if the two businesses are within the same broad industry group.

In addition, the proposed rules:

- **let you use pre-2018 NOLs** to offset 100% of your UBTI
- **limit the conditions** in which you must combine your organization’s ownership interest with interests held by related persons or entities
- **allow you to make charitable gifts** as a way of offsetting your UBTI liability. 

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## UBIT, Taxes, the IRS, & You

For more on unrelated business income tax and other IRS matters, see these articles at NonprofitWorld.org:

**Are Your Activities Safe from UBIT?** (Vol. 16, No. 5)

**IRS Audits: What Could They Mean for Unrelated Business Income?** (Vol. 35, No. 3)

**The IRS 990 Return: It’s More Important Than You Think** (Vol. 16, No. 2)

**New Act & Ruling: What Are the Fundraising Repercussions?** (Vol. 15, No. 1)

**The Compliant, Unaccountable Nonprofit or How to Not Be Accountable, While Remaining Compliant with IRS Disclosure Rules** (Vol. 18, No. 4)

**The Biggest Audit Mistakes Nonprofits Make & How to Avoid Them** (Vol. 37, No. 1)

**UBIT: What It Is & How to Avoid It** (Vol. 13, No. 4)

**What You Need to Know when You Can’t Pay Your Taxes** (Vol. 36, No. 4)

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

**Nonprofits without Audit Committees Risk Disaster** (Vol. 22, No. 2)

**New Excise Tax: How Will It Impact Nonprofits?** (Vol. 37, No. 2)

**How to Find the Perfect Auditor** (Vol. 22, No. 3)

## FOOTNOTES

<sup>1</sup> Prop. Reg. 1.512(a)-6(c)(3), (4)

<sup>2</sup> Prop. Reg. 1.512(a)-6(c)(1)(i)-(ii)

<sup>3</sup> Id.; 85 Fed. Reg. 23172, 23179-80

<sup>4</sup> Prop. Reg. 1.512(a)-6(c)(2)(i), (ii), (3)

<sup>5</sup> 85 Fed. Reg. 23172, 23180

<sup>6</sup> Prop. Reg. 1.512(a)-6(c)(4)(i), (iii)

<sup>7</sup> Prop. Reg. 1.512(a)-6(c)(4)(iii)(A)-(D)

<sup>8</sup> Prop. Reg. 1.512(a)-6(c)(4)(ii)

<sup>9</sup> 85 Fed. Reg. 23172, 23181

<sup>10</sup> Prop. Reg. 1.512(a)-6(c)(2)(ii)

<sup>11</sup> Prop. Reg. 1.512(a)-6(c)(5), (e)(2)(ii)

<sup>12</sup> Prop. Reg. 1.512(a)-6(c)(5)

<sup>13</sup> Notice 2018-67, Sec. 6.04

<sup>14</sup> Prop. Reg. 1.512(a)-6(f)

<sup>15</sup> Prop. Reg. 1.512(a)-6(c)(1)(iii)

<sup>16</sup> 85 Fed. Reg. 23172, 23184; Code Section 514(b)(1)(B)

<sup>17</sup> Code Section 512(b)(3)(B)(ii); Reg. 1.512(b)-1(c)(2)(iii)(b)

<sup>18</sup> Code Section 512(b)(10), (11)

<sup>19</sup> 85 Fed. Reg. 23172, 23189

<sup>20</sup> Prop. Reg. 1.512(a)-6(h)(2)

<sup>21</sup> P.L. 116-36, 134 Stat. 281, Sec. 2303(a)

<sup>22</sup> Code Section 172(b)(1)(D)(i)(I)-(II), as amended by P.L. 116-36, 134 Stat. 281, Sec. 2303(b)

<sup>23</sup> FAQs – Carryback of NOLs by certain exempt organizations (June 8, 2020)

# Earn a Certificate in Nonprofit Leadership & Management



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# Rethinking Our Place in the Economy

Three books provide a rare, insightful economic perspective on nonprofits.

Reviewed by Terrence Fernsler

## Managerial Economics of Non-Profit Organizations.

By Marc Jegers. Routledge Publishing ([routledge.com](http://routledge.com)).

Nonprofit management books are easy to find; economic management books dealing with nonprofits, on the other hand, are rare. *Managerial Economics of Non-Profit Organizations* is one of those rarities, offering a fresh look at why nonprofits exist in a market economy and how organizations from different sectors can viably function side by side.

Viewing management practices from an economic perspective, focusing on the peculiarities of nonprofits, offers a useful perspective on strategic planning, funding sources, accounting, and human resources as well as nonprofits' financial vulnerability and the cost of capital. The book keeps mathematical equations so often favored by economists to a minimum in order to be understood by a wider audience. It's intended for those with an interest in the economic functioning of nonprofit organizations, a basic knowledge of microeconomics, and a desire to fully explore the functions of management.

## Economics for the Many.

By John McDonnell. Verso Books ([versobooks.com](http://versobooks.com)).

We all participate in the economy. We can pretend the larger economic system has nothing to do with our organizations. Or we can shift our attitudes about the economy to give real meaning to our work.

*Economics for the Many* addresses the economy through a political lens. While the political approach will cause some nonprofits to shy away from this book, it contains positions that align with the purpose of most nonprofit organizations:

- reframing tax “reform” as tax justice
- exposing the inhumanity of protectionist trade policies
- sharing how the replacement of labor and production resources with capital turns citizens into consumers and distances them from democracy.

“Shifting our attitudes about the economy can give real meaning to our work.”

The book describes the consequences of blind faith in the current economic system: how it further marginalizes those our organizations are meant to support.

The system itself must be challenged as ever larger numbers of people become disenfranchised from opportunity and social justice. In a time in which economics is deeply interwoven with politics, nonprofits that seek change must increase their investment in transforming the economic-political system.

While many nonprofit organizations are already working to reform economic decision-making, many more could find ways to do so. This book explains how and why new behaviors make sense for the nonprofit sector, rooted as it is in social justice. In a society in which economics plays such a predominant role, we owe it to our volunteers, our constituents, our communities, and our selves to strive for economic decision-making that will make sense for us all.

## Doing Good Well.

By Willie Cheng. Jossey-Bass Publishers ([josseybass.com](http://josseybass.com)).

Perspectives from those in other cultures can be instrumental to nonprofits in this country. That's true of southeast Asia's Willie Cheng, who in *Doing Good Well* sets the paradigms of the nonprofit sector against the background of Singaporean-style economics.

Cheng's economic background helps him explain clearly why nonprofit earned-income ventures are often not profitable, why there's a structural disconnect between nonprofit revenues and expenses, and why less than optimal practices may still be “good enough” in the nonprofit world. Perhaps the best use of this intriguing, 290-page book is to read it for its insights on how to operate a nonprofit productively in a capitalist society. 

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# Connecting through the Camera & Keyboard

Use these success strategies to manage meetings in the virtual world.

By *Kate Zabriskie*

**A**s the world finds itself adopting virtual meetings, many people struggle to translate the in-person experience to an online format. Luckily, there are some tried and true actions you can take to have your online gatherings running like clockwork.

## 1. Know What You Want to Accomplish

Just as it's important to have a game plan for an in-person meeting, it's essential that you have a goal for any online get-together. Are you informing, gathering information, looking for opinion, making a decision, or something else? If you don't know, your meeting isn't going to feel as tight as it could, and you won't look as put together as you might have if you'd done some thinking in advance.

Once you know the goal, it should inform the meeting's length, number of attendees, and desired level of interaction. For example, if you're discussing your telecommuting rules, you're probably not seeking opinion but instead providing information and perhaps answering questions. Given the one-way nature of the bulk of that gathering, you can probably accommodate far more people than you could if your goal were to elicit opinion and seek input.

## 2. Communicate Your Expectations

People will be more willing to do what you ask if you model the behavior you want. If you want them to type something in the chat box, you should type as they are typing. If you want them to share their cameras, have a slide outlining your request as people join the meeting. If you want them to raise their hands to answer a question, raise your hand when you ask it. The more deliberate, direct, and specific you are in your instructions and actions, the better.

## 3. Share a Roadmap

Just as an in-person meeting can benefit from an agenda, virtual meetings need a roadmap or itinerary. In the virtual world it's helpful to show the agenda several times during the meeting and point out where you are on the schedule. An agenda check refocuses people who may have drifted off and gives them an easy onramp back to the meeting. Furthermore, acknowledging where you are in the process gives people a sense of movement (or lack of movement, for that matter) and helps the group stay on task.

## 4. Recognize Technology Diversity

When it comes to technology, the virtual world is not equal. In a typical meeting, some participants will have equipment and bandwidth worthy of a Hollywood production, while others will appear to have a dial-up line reminiscent of the previous century.

Thus, it's important to think about what could go wrong and how to troubleshoot potential problems before they occur. For example:

- **Will you record and post the meeting** for people who have difficulty joining?
- **Do you have a dial-in number** for those attendees who can't get VoIP (voice-over-internet-protocol) technology to work correctly?
- **Will you send slides in advance** for people who have difficulty logging in altogether and must rely solely on a PDF (portable document format)?

The more you prepare for problems, the easier they are to deal with should they arise.

## 5. Arrive Early & Start on Time

If at all possible, it's a good idea to arrive to your virtual meeting well in advance of your participants. The time you have in the virtual room before it fills will give you an opportunity to troubleshoot your technology, get comfortable in your seat, and welcome early birds as they enter the room.

Your early arrival also avoids having participants wait in a "lobby." In principle, the lobby is a neat concept. But in practice, it can work against you. If participants arrive to a lobby, they'll likely work on other tasks as they wait for you, and you'll have to work harder to get the full attention they were initially prepared to give you.

## 6. Accept that You're Competing for Attention

Nothing says multitasking opportunity like a web-based meeting. Even the most interesting person competes with a participant's inbox, text messages, and just about any other distraction. You must double or even triple your efforts to keep virtual attendees involved.



Putting yourself on camera and asking participants to appear on camera is only the first step. Next, you have to think about ways to keep people's eyes on the screen or the handout and their hands busy about every two minutes. Two minutes? Yes! People want to be engaged. If they don't engage with you, they will engage with something else.

## 7. Add Variety

The longer your meeting, the more important it is for you to add variety. If you are surveying people, for example, consider asking a poll question that uses fingers held up to the screen, another that uses the system's polling function, one that requires people to stamp a shape on a Likert scale displayed on a slide, and another that requires attendees to type a number in the chat box. The idea is to avoid becoming predictable. Slide, slide, poll; slide, slide, poll; slide, slide, poll equals BORING.

## 8. Balance Conversation

In any meeting, in-person or virtual, people will participate at various levels. A good meeting facilitator will take action to add balance. For instance, "I'm going to throw this next question to the people I see in the second row on my screen. That's Jane, Josh, and Juan." In that example, nobody is individually put on the spot. However, those three participants know that at least one of them is on deck to speak next.

In addition to calling on different people, you should also consider directing people to different channels. "If you would like to answer in the chat box, do that. If you would prefer to open your microphone, go ahead. If you would like to send a message just to me, send a private chat." The variety of avenues offered in that example will accommodate people who like to talk, those who prefer to write, and others who are less comfortable speaking up in public.

## 9. Consider Creating a Production Team

It takes time to master a virtual meeting program, and even the pros can find it difficult to wear half a dozen hats at once. If you're running a large meeting or are new to the process, consider assembling a team. For example, designate someone to troubleshoot tech problems for attendees, assign a chat monitor to bring to your attention anything that you don't see right away, and so forth.

## 10. Limit Your Time & Use it Wisely

No adult wants to sit for more than two hours at a time, and this is especially true in the virtual world. If you plan to move a six-hour meeting online and leave the agenda essentially as is, think again.

For meetings that are essentially information-sharing exercises, consider limiting yourself to one-hour blocks. For interactive conversations, you should be able to get away with two hours at a time.

Rarely, if ever, should you schedule more than four hours a day. And those four hours should include a generous break if possible. If you need more hours to accomplish everything you need to, consider running smaller meetings with fewer people, spreading a long meeting over several days, or sharing video recordings instead of bringing people together.

## 11. Find Role Models & Seek Advice

Paying attention to what you like and don't that others do in their meetings will help you grow. Asking for feedback from your attendees will further accelerate the process. 

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*Kate Zabriskie is the president of Business Training Works, Inc. (Businesstrainingworks.com), a Maryland-based talent development firm. She and her team help establish customer service strategies and train people to live up to what's promised.*

### Focus on What Matters Most

Expand your knowledge of these vital tips with articles such as these at [NonprofitWorld.org](https://www.nonprofitworld.org):

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

**Why Feedback Is the Key to Your Success** (Vol. 35, No. 3)

**Be a Better Leader by Being a Careful Listener** (Vol. 37, No. 1)

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

**Why Your Employees Are Losing Motivation – and What to Do about It** (Vol. 29, No. 4)

**How to Make Mistakes** (Vol. 30, No. 2)

**Better Delegation = Better Leadership** (Vol. 37, No. 3)



# Unlocking the Power of Soft Skills: The Missing Basics in Today's Workforce

Help your coworkers learn these essentials – and hone them yourself – with these tips.

**W**hat's missing in today's organizations? According to Bruce Tulgan, the problem – especially in workplaces that employ young people – is a lack of soft skills – the non-technical abilities that encompass self-awareness, problem-solving, and teamwork. Soft skills are less tangible and harder to define and measure than hard skills, but they're critical to organizational productivity, Tulgan observes in *Bridging the Soft Skills Gap* (wiley.com).

He organizes soft skills into three categories that capture the thousands of details of behaviors needed by today's workers:

- **professionalism:** self-evaluation, personal responsibility, a positive attitude, good work habits, people skills
- **critical thinking:** proactive learning, problem-solving, decision-making
- **followership:** teamwork, good citizenship, adaptability, respect, commitment, hard work, cooperation.

Tulgan (bruce@rainmakerthinking.com) convincingly explains why so many of today's workers lack these vital

“Just saying, “Improve your communication skills” isn't helpful.”

skills and suggests ways to help your coworkers master the basics. This advice includes:

**Build soft skills criteria** into every aspect of your staffing strategy and hiring process. For every position, create a job description that includes not just the hard skills for that role but also the key soft skills.

**Ask staff members to take a personality test** such as the Myers-Briggs Type Indicator or the Enneagram (available online). Understanding one's personality is a first step in self-knowledge – the underpinning of all the soft skills.

**Create an organizational culture that focuses** on soft skills. Make sure people know which strengths are crucial to your organization's success. Make those abilities the foundation of your culture. Do everything in your power to support and reward those high-priority behaviors.

**Explain to workers why soft skills** are important to their jobs. Let them brainstorm ways to incorporate the new proficiencies into their work.

**Break down each skill** into steps, techniques, and tactics that can be learned and practiced. For the “people skill” of

“Young people, especially, lack the soft skills.”

## “Help people turn new behaviors into habits.”

interpersonal communication, for instance, ask employees to list the key people with whom they need to interact during the next week. For each person on the list, have them write notes about when and how they'll get in touch, the reason for the meeting, what they'll try to learn, what questions they'll ask, and so on. Always suggest tasks that are as specific as possible. Just saying, "Improve your communication skills" isn't helpful.

**Help employees create goals** for turning the new behaviors into habits. Roleplay with them. Provide checklists to assure that they practice the new skills every day, over and over, until the new, positive habits are ingrained.

### Your Soft Skill Checklist

Someone proficient in soft skills is often said to have high EQ. (EQ is short for emotional intelligence, a term coined by Daniel Goleman in his book *Emotional Intelligence*.) Test your own EQ by answering Yes, No, or ST (Sometimes) to these questions.

- \_\_\_\_\_ Do you laugh easily at yourself?
- \_\_\_\_\_ Are you in tune with your feelings and instincts?
- \_\_\_\_\_ Do you bounce back from misfortune and use it as a learning opportunity?
- \_\_\_\_\_ Are you almost always taking a course, reading a book, or otherwise learning something new?
- \_\_\_\_\_ Is it a priority for you to give credit to others and build teamwork, cooperation, and partnerships?
- \_\_\_\_\_ Do you have a strong sense of who you are and what values are important to you?
- \_\_\_\_\_ Are you constantly looking for new things you can learn?
- \_\_\_\_\_ Do you handle stress well and stay calm during conflicts?
- \_\_\_\_\_ Are you careful to keep yourself out of a rut by gaining new views and trying new things?
- \_\_\_\_\_ Do you listen carefully to others and tune in to their feelings as well as their words?
- \_\_\_\_\_ Are you self-motivated and able to delay gratification?
- \_\_\_\_\_ Can you see the humor in difficult situations?
- \_\_\_\_\_ Are you honest, trustworthy, and responsible for your actions?
- \_\_\_\_\_ Do you encourage people of different generations, genders, and cultures to share their perspectives?

Turn each No or Sometimes into a Yes by reading articles such as these at [NonprofitWorld.org](http://NonprofitWorld.org):

**In Search of the Balanced Leader** (Vol. 16, No. 6)

**Making Better Mistakes** (Vol. 38, No. 4)

**Can We Call a Truce? Tips for Negotiating Workplace Conflicts** (Vol. 27, No. 6)

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

**Zen and the Art of Team Building** (Vol. 20, No. 1)

**Smart & Fast Are Not Enough: The Need for Better EQ** (Vol. 29, No. 1)

**Be a Better Leader by Being a Careful Listener** (Vol. 37, No. 1)

**Embrace Mindfulness as a Leadership Practice** (Vol. 36, No. 2)

**Intuition in Decision-Making** (Vol. 25, No. 4)

**Is It Time for a Time-Out? Take Stock of Your Life** (Vol. 31, No. 4)

**Cultural Competence: What Does It Mean for You?** (Vol. 26, No. 5)

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

**Six Ways to Get Out of a Rut** (Vol. 24, No. 4)

**Organizational Culture: It's in the Walk, Not Just the Talk** (Vol. 29, No. 6)

**What's Your Color?** (Vol. 34, No. 4)

**Tapping into the Next Generation: Pitfalls & Best Practices for Engaging Millennials** (Vol. 37, No. 2)

**To Be an Ingenious Leader, Take Charge of Your Learning** (Vol. 37, No. 3)



# New Ideas for a New Era

Here's how digital solutions can help you thrive as you move into an uncertain future.

**By Brian Lemond**

**T**he world has changed in fundamental ways, and pre-pandemic patterns and relationships may never return. The only way we can move forward is to accept that old ideas may no longer work and that innovation has never been more needed.

With organizations pressed for creative thinking, we at Brooklyn Digital Foundry ([brooklynfoundry.com](http://brooklynfoundry.com)) are having daily conversations with clients about the role technology can play in responding to these disruptions. We know the best solutions are tailored to each organization's specific needs, yet the general themes emerging from these strategy sessions have value across the sector.

The five concepts below will act as conversation starters with your team and partners. These concepts acknowledge a core truth – that people around the world have turned to digital tools and experiences to lessen isolation, bridge distance, and create the connections that define our humanity.

To address that shift, mission-driven organizations are increasingly prepared to take bold steps. There's a newfound openness to experimentation, both by organizations and the audiences they serve.

## 1. Start Conversations

Many organizations – especially those built around visitorship, collections, education, and other location-specific public experiences – are asking how to get material out to their community. This is a natural instinct. In most cases, we agree that distribution of core content should be the first order of business. But that alone won't differentiate you from peers competing for the same audiences and funding. Instead, think about digital experiences less as broadcast and more as dialogue. Create ways for audiences and communities to engage your team or, better still, each other. For example:

- **An activist organization might promote small-group discussions** between audience and staff, seeding new nodes in their network.
- **A research coalition might schedule virtual panel discussions** with program directors, experts, and funders, marrying livestreamed Q & A and social channel integration to advance visibility at the same time they invite audiences into knowledge-sharing and collaboration.
- **A theater company might host breakout sessions** with cast and audience following a virtual performance,

enhancing a fragmented performance by creating deeper, more memorable connections to the material, performance, and community.

These opportunities to build connection and community are powerful experiences for audiences. They're also potent ways to demonstrate your organization's relevance.

## 2. Be More Personal

For years, organizations have sought digital personalization – complex, algorithmic software solutions that shape and deliver content to meet the tastes and expectations of individual consumers. Today, we're suggesting something faster and easier: *personification*.

Imagine a museum hosting small-group virtual tours, streaming Q & A sessions with conservators, or launching daily Twitter takeovers by curators. Bringing the experience and personality of behind-the-scenes staff to the foreground changes the traditional relationship between audience and institution. It builds intimacy while responding to our recent and sudden loss of social cohesion.

## 3. Reach New Audiences

Building on the ideas of conversation and personification, you might re-examine long-held assumptions about audiences. As the tools used to share content and engage people change, so might the opportunity to reach more diverse communities.

For instance, with the pandemic altering the terrain for engagement, we've seen rapid acclimation of older audiences to digital tools. We're also seeing an increased appetite for digital experiences across all demographics.

Shaping initiatives to new constraints and responding to emergent market demand can spark new ideas. To inspire your team, listen to the challenges expressed by your audiences, and think about solutions for relationships in limbo.

For example, a public garden may no longer be able to invite visitors to their grounds but with minimal staff could launch a virtual garden school. This initiative could then be marketed to summer camps and schools scrambling to provide quality programming.

Tailoring your organization's content and expertise to the needs of the moment builds lasting connections with new audiences. In the example above, many children and parents engaged by the virtual school will take away a positive impression of the organization; the same is true of the new partnerships established with educators and counselors.

Everyone who has a great experience is more inclined to visit, refer, promote, and support your organization. That will do more than help you thrive now; it will make your organization healthier in the long run.

## 4. Build Alliances

At a moment of profound dislocation, cooperation between organizations and institutions has the power to create new spaces for connection and community. Partnering with peer institutions or organizations across different scales and sectors can use common interests and aligned values as threads that bind people together.

Collaboration between organizations can also provide essential support to other mission-driven entities. Even an organization considered a direct competitor a few short months ago might yield a positive alliance. By leveraging the unique capabilities of each partner, conversations deepen, content becomes richer, discrete audiences become shared communities, and all partners benefit.

Candidly assess what your organization brings to the table as well as your blind spots. Then explore new models for digital collaboration. That might be as simple as aligning peer institutions around a common hashtag or content theme to promote awareness. Or it could be a fundamentally new approach to programming.

Imagine a group of small colleges subsidizing a series of outdoor, live-streamed conversations between climate scientists and environmental organizations with open Q & A periods from prospective students. The colleges provide space and technical facilitation, showcase their campuses, and highlight important work on urgent challenges. In turn, the schools speak directly to engaged members of their future classes and build partnerships with organizations struggling to be heard over the daily news crises. By coordinating publicity across many schools, organizations, and participants, the signal cuts through the noise.

## 5. Take Smart Steps

For each of the examples cited above, it's easy to imagine a full spectrum of implementations, from simple, fast, and free to complex, slow, and costly. Our recommendation is to identify a series of initiatives and pursue each at multiple points on that arc.

Start with what can be done immediately and with little expense; at the same time, build the strategy and resource allocations necessary to execute more robust versions. Phasing outputs in this way delivers a host of benefits:

- **Early experiments** test market appetite with minimal cost.
- **Developed projects and programs** provide essential qualitative and quantitative data to shape subsequent offerings.

- **Mature platforms** build awareness and expand audience reach at scale while signaling leadership and providing markers for peers and partners to follow.

In many conversations we're having, organizations are feeling the pressure to avoid mistakes. Budgets are tighter, resources are spread more thinly, operational paradigms continue to adjust to evolving circumstances. Often, organizations are facing existential questions that can make conversations about building communities and engaging audiences seem like distant goals from better days.

But many mission-driven organizations already have the oxygen they need to thrive – the ability and desire to connect with others, to inform people, and to inspire action. The techniques above are guidelines to build lasting partnerships, support aligned organizations, and chart your own path through this period. They'll help you improve visibility, expand audience reach, entice media coverage, and strengthen existing relationships while establishing new ones. Whatever your challenges and strategies, preparing for an increasingly digital future will pay dividends. 

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*Brian Lemond is the co-founder and managing director of Brooklyn Digital Foundry ([brooklynfoundry.com](http://brooklynfoundry.com)), an organization that plans, designs, and builds technology-led solutions for complex challenges. The Foundry has been supporting mission-driven organizations with brand, digital, and content solutions for 20 years.*

## Collaboration, Innovation, and the Future

Take bold steps to put new ideas into action with these articles from NonprofitWorld.org:

**Looking for a Win-Win Partnership? Look to the University!** (Vol. 18, No. 4)

**The Strategic Alliance Journey: Forging Outrageously Successful Relationships** (Vol. 28, No. 3)

**If You're Not Growing, You're Dying** (Vol. 22, No. 5)

**Being Pro-Active Means Being Pro-Future** (Vol. 18, No. 5)

**What's Your Alliance IQ?** (Vol. 27, No. 5)

**Creating a Climate for Innovation** (Vol. 29, No. 4)

**Empower Your Employees to Be Mini-Marketers** (Vol. 25, No. 6)

**A Collaboration Checklist: Ten Questions for Success** (Vol. 24, No. 1)

**Outside the Comfort Zone** (Vol. 25, No. 3)

**Thinking Out of Pandora's Box** (Vol. 20, No. 2)

**The Power of Partnership** (Vol. 25, No. 3)

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

# To Make an Impact, Improve Your Non-Verbal Awareness

Your voice and body language can turn people off or on.  
To gain more support, turn these basics to best advantage.

*By Bob Phibbs*

**T**he more you understand what your body and voice tell others – often without your knowledge – the clearer you’ll realize the need to pay attention to those oft-neglected elements of communication. Unless you focus on them, they can get in the way of your message.

That’s especially true when you’re trying to convince people to donate money or support you in other ways. In such situations, your body and voice often communicate fear – and fear makes people look away. Fear can silence your own voice when it needs to be heard.

People can sense bad vibrations even when your words are positive. Indeed, much of your communication has nothing to do with the words you use. (Some researchers say that your actual words make up only 7% of communication; 55% is your body language, and 38% is your tone of voice.)

When you communicate virtually, as by videoconference or phone, you may be tempted to forget about your body language. But in virtual situations, when people have fewer clues to rely on, they’ll scrutinize you even more closely than in person.

During video meetings, for example, people may study your reactions when others are speaking, so you don’t want to be caught yawning, checking texts on your phone, or looking disinterested or distracted in any way. (See “Zoom Exhaustion Is Real: How to Find Balance & Stay Connected” on page 31 and “Connecting through the Camera & Keyboard” on page 16 to create positive virtual experiences.)

“Your body and voice tell people much more than your words do.”

## What’s the Energy Around You?

Think about a time you felt devalued by someone. Picture their voice and body language as they belittled you. Imagine you’re looking at that person right now as they yell insults at you. Now let your body react as you did then.

What was your body’s reaction? I’ll bet you cringed, averted your eyes, and slumped your shoulders. You might have turned away or even stepped back.

Now think what it would feel like to be asked for support by someone whose shoulders were slumped, who didn’t meet your eyes, whose arms were crossed. Would you feel engaged by them? Of course not!

Their body was telling you they weren’t being authentic. Their non-verbal cues made it hard for you to trust them.

Most people don’t realize how much they communicate through their voices and bodies, so the first thing to do is simply take notice. Do you cross your arms unconsciously? Do your shoulders slouch most of the time? Is your voice small and timid or overly loud and aggressive? Do you avoid looking into people’s eyes, or do you look at them with a defiant glare?

Those unconscious habits won’t bring supporters to you. In fact, those behaviors are communicating your unease.

## Understand These Wordless Cues

Even when talking on the phone, when people can’t see you, your posture affects how you feel and how your energy comes across. Whenever you talk to someone, try the following pointers to be sure you’re sending the right message:

**1. Lift your sternum** (that’s the flat bone at the front center of your chest). This allows more oxygen into the lungs. A good image to maintain is that of a string pulling your posture up from your sternum. This allows your shoulders to become more relaxed and your voice more confident when engaging people.

## “Nonverbal clues are what make people trust you – or not.”

**2. Lean forward** (but just a bit). Yes it's subtle, but it keeps you from leaning backward, which shows a negative attitude.

**3. Smile.** A smile is your best tool to gain support. When you don't smile, it's the quickest way to turn someone off. And you may be surprised to learn that people can “hear” your smile (or your frown) over the phone. Your voice will be brighter, more enthusiastic, and more persuasive when you're smiling.

**4. Meet their eyes.** We like people who look at us. Too much eye contact and it can feel threatening, but too little and you come off insincere. Yes, this is a balancing act to practice.

**5. Gesture.** Use an open hand or two fingers together as you gesture. It's perceived as more open and friendly than a closed hand.

**6. Open your arms** to show a welcoming attitude. Arms folded over your chest indicate you're unsympathetic, authoritative, and at some level, closing yourself off from the other person.

**7. Watch their body language.** An old-school tip says to mirror the other person's body language. For example, if they use their hands a lot, you do the same. If their arms are open, so are yours. To a certain extent, that's true. But if the person suddenly crosses their arms, you don't want to mirror that. Their body is telling you they're closed off. You need to maintain an open stance and find out what you said or did to displease the other person. Addressing it with something like, “Did I just say something to put you off?” is a good way to bring them back.

**8. Modulate your voice.** You communicate warmth, worry, indifference, frustration, empathy, or whatever emotions you're feeling with the tone of your voice and the pace, pitch, and volume of your speech.

Make sure you emphasize important words, let your voice rise and fall, and change your pitch back and forth from high to low rather than speaking in a monotone. A dull, spiritless voice makes people disconnect from your words.

Don't rush through what you have to say. Speak at a relaxed, easy pace, but keep energy and interest in your voice. Insert pauses between sentences, but don't hesitate too long, either.

Change the volume of your speech, too – talking more loudly to nail down a point and then more softly. Keep in mind that a loud voice isn't always the best way to gain attention. If you speak softly most of the time, you'll be more compelling when you amplify your voice now and then to underscore a point.

In short, find a balance in your tone, pitch, volume, inflection, and pace. Vary them to keep people's interest.

Take care not to let your voice get higher at the end of a sentence so that it sounds more like a question than a statement. Doing so suggests indecision, lack of confidence, and even incompetence. (It's a common habit, especially in young people these days, but it's worthwhile to break this habit as quickly as possible.)

Remember that your posture, breathing, and overall body language have a great impact, whether you're in sight of your listeners or not. For a more commanding voice, stand or sit up straight, and keep your shoulders and chest as still as possible. Each time you start a new sentence or thought, inhale silently and quickly, then exhale slowly just before you speak.

## Choose Your Demeanor

Examine your own behavior. In what situations do you lose your voice? At that moment, what does your body look like? When you're about to ask someone for their support, how is your body positioned? When do you notice your breath becoming shallow? When do you lean away from someone?

The more you can *choose* your body posture and voice, the more you'll find you can also choose your attitude. You might still be afraid at some level when asking for support. But when you use the tips in this article, you'll act as if you aren't afraid. That will let you place the fog of fear in the background. Then, the easier it will be to get your message across. 

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*Bob Phibbs is the CEO of The Retail Doctor (RetailDoc.com), a New York consultancy. As a speaker since 1994, his presentations are designed to provide practical information in a fun and memorable format.*

## Refine Your Communication Skills

Assure you're getting your message across with articles such as these at [NonprofitWorld.org](http://NonprofitWorld.org):

**Fear of Feelings: Dealing with Emotions in Public Speaking** (Vol. 17, No. 2)

**How to Fix Communication Breakdowns** (Vol. 29, No. 1)

**Avoid the L Word** (Vol. 37, No. 2)

**Cynicism Rx: Authentic Communication** (Vol. 24, No. 6)

**Be a Better Leader by Being a Careful Listener** (Vol. 37, No. 1)

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

**We Are Made for Story** (Vol. 37, No. 4)

**How Jargon Undermines Communication** (Vol. 27, No. 2)

# Boost Your Organization's Resilience

Use this approach to prepare for whatever the future brings.

*By Jill J. Johnson*

**A** time of stress and disruption is the perfect opportunity to put your “long game” into play. The “long game” is your resilience strategy. Here are ways to plan your next steps while harnessing your inner strength.

## Take an inventory.

Focus on what you have, not on what you've lost. You still have your skills and knowledge. These are valuable. Is there a way to use your talents that you haven't considered? If you're wise about how you frame it, this could be the new foundation for the long-term future.

## Cut costs.

If you have an eye on being resilient for the future, you will want to conserve cash. Review all credit cards for any automatic payments and ask if you really still need them. Don't just focus on the monthly charge. Convert those monthly charges to their equivalent cost for a full year. The annualized number is what you should consider. Can you pay more important bills if you let them go?

The same thing holds true for your cash expenses. Can you ask employees to shorten hours or take a modest short-term pay cut so you don't need to lay people off? Ask vendors to lower their costs. Review your phone bills to see if there are savings by switching carriers. The same goes for insurance and utility bills.

## Access resources.

State and national nonprofit associations can be valuable partners to you. The value they offer in access to information, peer networking, and education can optimize your resilience. Don't forget the great value of partnering with universities and colleges. Look for changes to government programs or new funding alternatives that become available to see if you now qualify. You might have more options available to you than you realize. But beware of falling prey to charlatans

who are offering to “solve” all your problems for a small (or not so small) fee. Vet them carefully.

## Strengthen connections.

Keep in touch with your supporters even more than usual – and even if they're not donating right now. Focus your energies on what you can do for them. Think about how communication you employ right now can play out over the long term.

## Use your network.

Explore the power of partnership and collaboration through the community you have built. You can often find a tribe of like-minded people online. Your nonprofit associations are also full of people in the same situation as you. Coming together to brainstorm ideas for new approaches and to share news about resources is a powerful way to focus your energies on recovering from a tough situation. Set up a regular call with your peers or allies. It might be each night at a designated time or on a weekly basis. Focus your conversations on problem-solving and forward thinking.

## Be realistic.

You hate to consider closing your organization. But, if things get too tough, you might have to shift to a temporary hiatus or scale your operations and employment back to a more modest level. This doesn't mean you're closed. You would just be focusing on a temporary, pragmatic solution. This could take away some of the financial pressure. Don't let your pride get in the way of taking advantage of a temporary opportunity to get some cash coming in your door. While this can be difficult, it may give you the breathing room you need.

## Focus your mindset.

Make the decision that you will survive whatever happens, through your own grit, determination, and effort. Find music, activities, and people that will support your positive mindset. Determine to keep focusing on solutions. Give yourself some grace. Be compassionate with yourself just as you would to a dear friend you care about. Find healthy ways to cope with stress and help your employees do the same. Take care of yourself and those around you physically, emotionally, and spiritually.

“Beware of falling prey to charlatans.”



## Remember the past as you look to the future.

Over the decades, nonprofit leaders have weathered recessions, natural disasters, terrorist events, and strategic failures. They made choices each day that were laser-focused on their short-term survival and their intention to achieve long-term success. They leveraged unexpected opportunities into cash flow, connections, and tactics to survive and thrive. You can do the same! 

*Jill J. Johnson is the president and founder of Johnson Consulting Services (jcs-usa.com). She is a highly accomplished speaker, an award-winning management consultant, and author of the best-selling book Compounding Your Confidence.*

## Weather Any Storm

Storms will come and go. The organizations and leaders who rebound are those with resilience and forethought. Here are more ways to put your resilience strategies into practice (NonprofitWorld.org):

**Restructuring Contracts in Stressful Times** (Vol. 28, No. 3)

**How to Cut Overhead Costs** (Vol. 30, No. 4)

**Counteract Stress to Make the Best Decisions** (Vol. 28, No. 1)

**Looking for a Win-Win Partnership? Look to the University!** (Vol. 18, No. 4)

**Operating Reserves: Not Just for Disaster Recovery** (Vol. 31, No. 2)

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

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

**Embrace Mindfulness as a Leadership Practice** (Vol. 36, No. 2)

**25 Ways to Cut Costs** (Vol. 26, No. 2)

**Dealing with Viruses & Other Disruptions** (Vol. 38, No. 2)

**Need a CPA at Little Or No Cost?** (Vol. 28, No. 2)

**Don't Go it Alone in a Crisis** (Vol. 37, No. 2)

**What's Your Alliance IQ?** (Vol. 27, No. 5)

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- **Reduced enrollment fees** from the Learning Institute for the Society's **Certificate of Excellence in Nonprofit Leadership and Management**
- **Free job postings** on our NonprofitCareers.org job site

For more information, visit: [NonprofitWorld.org](http://NonprofitWorld.org)



# Overcome People's Resistance with These Steps

Help people find the courage to change.

By Edward G. Brown

**A**re you ever frustrated by board members who refuse to raise funds, employees afraid to try new things, supervisors who back off from coaching others? The answer may be right there in your hands. When people lack a critical skill, they need to be trained in it. If they're afraid to do their job, they need to be taught, in this case, courage.

Courage is what's called a "soft skill" or "third-space skill" in a world that considers business and engineering first- and second-space skills. Courage is the most essential third-space skill in today's organizations.

Courage isn't the absence of fear, because fear is always with us. Rather, courage is the ability to overcome fear. Those who don't learn courage will be forever hobbled by the constraints of their fear.

How can courage be taught? There are six key ways:

**1. Remember that you can't fix it until you admit it.** Courage comes from the French word for "heart." What gives heart to people trapped by fear? Realizing they're not alone – that the brashest, boldest-appearing person they know carries doubts, too – sets them on a path to confronting their own fears.

“Take a small action within 48 hours of learning a skill.”

**2. Be sure people realize that courage is learnable.**

Just as there are steps to learning math, or engineering, or French, there are steps to learning courage. It comes in increments, but it comes.

**3. Start small.** People quail in the face of big risks but can be coaxed to take lesser risks. It's called the "off-Broadway principle." Stage your show where a failure won't hurt. Correct mistakes before going big.

**4. Have people take a small action** within 48 hours of learning a new skill so that they immediately build confidence and experience. Lag time creates space for fear to reassert itself.

**5. Welcome people's objections.** When was the last time you were being sold something, or told to do something, and you immediately responded with "Yessir!" That's not how people work. We question, we clarify, we offer concerns,



“Lag time creates space for fear to reassert itself.”

we negotiate. Those may sound like no's but they're really just steps on the way to yes. Be ready to confront people's doubts and remove their resistance with gentle reassurance.

**6. Begin by changing the behavior.** Fears are often revealed through nervous behaviors. Shaky voice and hands. Rushed words. Monotone. Shrinking posture. Don't let that happen to people in your organization. Instead, feed them confidence in the form of communication skills: "Here's the tone you want, and the tempo – practice using them. Here's what your hands should be doing, and your eyes, and your arms. Here are words to use for this occasion, and others for that. Where's the smile? Here's how to listen. How do you show that you're sincere?" Change the physical and the mental will follow. (See "To Make an Impact, Improve Your Non-Verbal Awareness" on page 22 for small but important tweaks you can make to people's communication skills.)

Success favors the brave. If people are letting fear hold them back, there's only one solution: Teach them courage so that they can let go of their trepidation and leap forward to reach their full potential. 

*Edward G. Brown is the author of The Time Bandit Solution: Recovering Stolen Time You Never Knew You Had and co-founder of Cohen Brown Management Group, a leader in consulting and training in the area of culture change. For more information, visit [timebanditsolution.com](http://timebanditsolution.com) and [cohenbrown.com](http://cohenbrown.com) and connect on Twitter, @EdwardGBrown.*



## Move from Training to Action

Provide training in the skill of courage, and you'll create an organization of intrepid people, eager to take the risks that will lead to growth and success. Start with these articles at [NonprofitWorld.org](http://NonprofitWorld.org):

**Take Your Training into Your Hands** (Vol. 29, No. 6)

**Fear of Fundraising** (Vol. 20, No. 5)

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

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

**The Risk of Not Risking** (Vol. 35, No. 2)

**Getting Comfortable with the F Word: Fundraising & the Nonprofit Board Member** (Vol. 20, No. 4)

**How to Present Training Workshops that Educate and Inspire** (Vol. 29, No. 4)

## Coming Up in Nonprofit World



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- Three Expensive & Common Nonprofit Conflicts
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And much more ...



# Livestreaming for Good: A Nonprofit Guide

It's easier than you think to broadcast an event or production video to large or small audiences.

*By Cassandra Steele*

Livestreaming is a great way for nonprofits to engage their audiences and share content. It offers real-time engagement opportunities and a live audience without gathering in person.

Livestreaming for your nonprofit may seem daunting, but it's easier than you think. This guide will help you get started.

## Choose Your Channels

When it comes to livestreaming online, there are multiple options. But how do you know which one is right for your nonprofit livestreams? Here's a rundown of the most popular platforms that offer livestreaming.

**YouTube Live:** The popular video-sharing platform offers you the ability to not only upload pre-recorded videos on your channel but also to create live video with YouTube

Live. All you have to do to go live on YouTube is to hit the create button and then "Go Live." Your channel subscribers will receive a notification.

**Facebook Live:** With Facebook Live you can reach out to your Facebook followers in a whole new way. Your nonprofit probably has a Facebook page already with some followers. Going live on Facebook is quick and easy to do from your Facebook account.

**Instagram Live:** As Instagram is owned by Facebook, Instagram Live isn't much different than going live on Facebook. However, there are some key differences: When using Instagram, you can go live only on mobile, and Instagram Live videos are always shot vertical.

Choosing which channel is right for your nonprofit livestream depends on your audience. You'll want to choose a channel where your target audience is active. Your followers are notified when you go live, so using the channel where you have the strongest following is an advantage.

No matter which channel you choose, make sure to promote your nonprofit's livestream on all channels.

“You don't need fancy equipment to livestream.”

## Understand Tech Requirements

You may think you need a fancy camera and audio equipment to livestream for your nonprofit, but that isn't the case at all. You can effectively livestream with a newer model smartphone or – if you're using a platform like YouTube that allows livestreaming from a computer – a good webcam.

## Pick a Topic

Now that you know where you can livestream for your nonprofit and the technical requirements, it's time to decide what you're going to livestream about. There's a pretty easy guideline you can follow here: If it's related to your mission, your audience probably wants to hear about it. So make sure that your nonprofit livestream content is mission-centric and engaging.

## Engage Your Audience

An engaged audience is key to a successful livestream for your nonprofit. Make sure you're engaging before, during, and after your live stream video.

### Before:

Promote the date and time of your livestream.

Ask people to send in their questions.

### During:

Have a teammate moderate the chat, gather questions, and engage with viewers.

### After:

Save the recording to post on social media so people who missed it can watch it later.

## Consider These Tips

While livestreaming is easy to do, there are a few things you should keep in mind for a great live stream.

- **Use natural lighting** if possible. If natural light isn't an option, use LED lights. Make sure that the light from windows isn't causing any glare or strange shadows.
- **Be mindful** of what is in the background.
- **Do a soundcheck** to make sure there's no echo or background noise.
- **Use a tripod** to hold the device. No one likes a shaky video.

In summary, a great nonprofit livestream is made of quality video and mission-centric, engaging content. You're all set to broadcast engaging content for your nonprofit over livestream. 

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*Cassandra Steele is an online fundraising and marketing professional. She blogs at Sumac (sumac.com), striving to provide the best online tools and services so you don't have to worry about technology and can focus on your mission.*

“Promote your livestream on all channels.”



## More Ways to Engage Your Audiences

For other tech solutions to connect with potential supporters, see these articles at NonprofitWorld.org:

[Accelerating Fundraising through Social Media](#) (Vol. 28, No. 3)

[Rest Your Weary Fingers: Voice Activation Is Coming to a CRM Near You](#) (Vol. 26, No. 1)

[The Top Five Digital Tools You Should Be Using Right Now](#) (Vol. 34, No. 2)

[Using E-Mail & the Web to Acquire & Cultivate Donors](#) (Vol. 21, No. 1)

[Two Surprising Ways to Broaden Your Reach Online](#) (Vol. 32, No. 4)

[Wow People with Your Digital Material](#) (Vol. 34, No. 2)

[How Mobile Marketing Can Work for You](#) (Vol. 32, No. 4)

[Top Ways to Gain Support Using Pinterest](#) (Vol. 33, No. 2)

[Create a Donation Page that Rocks](#) (Vol. 33, No. 1)

[Engage Donors with Social Media](#) (Vol. 33, No. 3)

[Benefits & Risks for Nonprofit Leaders Using LinkedIn](#) (Vol. 31, No. 2)

[Ignite Passion by Connecting Online](#) (Vol. 34, No. 4)

[Integrate Social Media into Your Website](#) (Vol. 35, No. 1)

## Gain Freedom from Technology

We might tumble out of bed on Monday morning and pour ourselves a cup of ambition, but are we all still working 9-5, as Dolly Parton sang 40 years ago?

You might assume a 9-5 workday is still the norm, but on reflection, aren't most of us now on the job 24 hours a day? The humble smartphone has got us bringing our work home in our pockets.

We're always contactable, whether it's via calls, e-mails, or mobile chat apps. The idea that we must answer calls at midnight has snuck up on us, and, it's contributing to the rise of work-based burnout.

The team at Condeco Software ([condecosoftware.com](http://condecosoftware.com)), a global leader in workspace management technology, has analyzed the trends and, along with finding that a 9-5 job is becoming a thing of the past, has outlined ways to gain smartphone harmony and freedom. Here are their findings:

**The productivity lie.** Statistics show that 50% of Americans check e-mail after they're tucked in bed, and 44% keep in touch with their workplaces while on vacation. Not exactly relaxing. Why are we so frightened of not being contactable?

The problem lies in two areas – one, that we, as a society, have come to believe in the myth of presenteeism. Whoever gets to the office first, stays latest, and now, answers the group e-mail the quickest (even at 5:45 p.m. on a Saturday) is considered the hardest worker. Most of us know this isn't the case, but the illusion pervades, because we've been conditioned to view being at our organizations' beck and call as the be-all and end-all of hard work.

Second, our devices are becoming, in many ways, an extension of ourselves. It's too tempting to pick up our smartphone when we hear a notification or just to double-check our e-mails. Many experts have written on the dangers of becoming too attached to our smartphones, from disrupted sleep patterns to a loss of social skills. Like most things in our modern lives, balance is key.

**How to achieve smartphone harmony.** Many countries have recognized the impact of 24/7 contact with work. France is ahead of the game globally, with government legislation allowing French workers the "right to disconnect" and French companies turning off their e-mail servers outside of working hours.

While it may take time to catch up to France, it makes sense to take responsibility for your work-life balance and seize your own personal "right to disconnect" as much as you can. What can you do to carve out time for yourself and to make your working life that little bit easier?

**Your disconnection challenge.** Tomorrow morning when you yawn and stretch and try to come to life, vow to avoid being part of the 68% of professionals who check their work e-mails before 8:00 a.m. and the 60% who are connected via their devices for 13.5 hours a day.

Turn away from your devices and disconnect as often as you can. Set a timer to remind you to check your e-mail twice a day rather than 20 times. Turn off your phone at least two hours before bedtime. Not only will time away from screens clear your mind and give you a good night's sleep, but it will also boost your productivity levels during the day. 

## How Are Charities Surviving the Pandemic?

New survey results from CAF America ([cafamerica.org](http://cafamerica.org)), a leader in international grantmaking, reveal that 92.4% of 414 global and local charitable organizations are still in operation despite the COVID-19 pandemic, although 91% say they've been negatively impacted. Findings show that organizations are adapting to our new "normal" with revised programming and fundraising efforts to continue providing services in response to the rapidly increasing needs of vulnerable communities:

- **More than 54% are providing new services and programs** to respond directly to COVID-19-related needs, including door-to-door distributions of household and essential items for families, virtual therapy sessions, and remote learning for students.
- **52.3% have limited their services** and programs.
- **Only 28.4% have not adjusted** their programs.

The 7.5% of organizations that have ceased operations indicated the following reasons for closing down:

- **64.5% are unable to provide services** and programs virtually.
- **30.6% are volunteer-based** and therefore had to suspend operations due to COVID-19 restrictions.
- **22.5% cannot pay salaries and bills** due to lack of funds, which is an indicating factor that organizations are fiscally responsible and working hard to raise funds.
- **16.1% don't have access to the necessary technology** and infrastructure needed to continue remote operations.

More than half of the organizations have launched new fundraising activities during the past two months to offset the COVID-19 impact, with varying success:

- **Nearly three-quarters of organizations** met less than 75% of their fundraising target, while 12% didn't raise any funds.
- **Only 16.6%** met 100% of their fundraising target.

However, organizations noted that funders are offering flexibility to continue financial support:

- **46.5% of funders are offering grant extensions**, allowing more time to implement current projects and postponing reporting requirements.
- **39.4% are providing need-based funding** for urgent needs.
- **39.2% have changed the grant purpose** to redirect funds to other or new projects.

One third of respondents are confident that they can sustain operations for as long as it's needed. Though this indicates resiliency, more than half report an urgent need for funds to cover operational costs, such as infrastructure, technology, salaries, and bills, and 32% aren't sure how long they can persevere under current conditions. 

## Zoom Exhaustion Is Real: How to Find Balance & Stay Connected

Do your Zoom meetings connect you with others yet leave you feeling disconnected? Glad to see people's faces but fatigued afterwards?

If so, you're not alone, and there's good reason for these contradictory feelings, as Steven Hickman of the Center for Mindful Self-Compassion ([centerformsc.org](http://centerformsc.org)) tells us. There's a different quality to our attention when we're online. We're hyper-focused on the few available visual cues that we normally gather from a full range of available body language. Here are ways to take advantage of this useful medium while saving your sanity.

**Take a few moments before clicking "Start"** to settle and ground your attention. Take some deep breaths, feel your body on the chair, and let yourself arrive fully in the moment.

**Take time to truly greet** whoever is in the Zoom room. Offer your full attention to each face that appears (if the group isn't too big). Let each person make an impression on you, and take in the feeling of being in the presence of another.

**Choose speaker view** rather than gallery view so that the person who is speaking has your attention and the others are peripheral. This is more like sitting around a conference table where you're aware of everyone but focused on whoever is speaking.

**Resist the urge to multitask.** A videoconference is tiring enough without putting additional effort into something else at the same time.

**Don't focus too intensely.** Instead, rest your attention lightly on what (and who) is before you. Periodically ease up your focus, soften your gaze, and let yourself see without scrutinizing.

**Take measured breaks** between video meetings. Try never to have such meetings back to back. Take care of your precious attention and energy. After a meeting, treat yourself to a refreshing pause before diving in again. 

—from [Mindful.org](http://Mindful.org)

## Asking for Funds in Uncertain Times

We're seeing a new outpouring of gifts, prompted by a powerful new approach, which Gail Perry ([gailperry.com](http://gailperry.com)) describes as the "Three-Step Fundraising Ask." This formula, tailored for these challenging times, works for both phone and digital communications. Of course, the phone is more powerful because you and your donor can have a direct conversation. But it works for digital appeals too.

**1. Open with a warm, personal connection** to the reader or listener. On the phone open with this: "Ms. Donor, this is Mary Smith from xxx organization, and we're calling to say hello and to thank you for partnering with us. We so appreciate your support. How are you doing?"

When asking online: "Thank you so much for your support of xxx organization. We hope you're doing OK in these turbulent times. All of us want to let you know how much we appreciate and value your partnership . . ."

**What's Gone?** The formalities. The acronyms. The grandiose bragging about your organization's successes.

**What's New?** The personal touch. The heart-felt comment. The warm, friendly energy of one person connecting to another.

**2. Share detailed information on what's happening** at your organization and the problem you need money to solve. For example: "The land trust is unable to save an important swamp." "The students don't have a place to live." "People are hungry."

**What's Gone?** The general, nonspecific ask to support the mission, programs, or the "work." The vague, bland words like "underserved."

**What's New?** Specific, transparent information about why you're asking for money. This is the time to be completely explicit about the situation. Don't mince words.

**3. Move on to a permission-based, gentle ask** that is an "invitation." By now, your donor is emotionally engaged and worried about the situation. You've evoked an emotion – and we all know that giving is an emotional act. On the phone, the donor may say, "How can I help?" If not, then you can ask: "Would you like to know how you could help?" If the answer is yes, you can move right to an ask.

For a digital format: "We really need the help of our supporters now – and if you're able, we would welcome your contribution to help fund xxx (talk about specifics that need to happen right now)."

This is a gentle, personal way to approach a donor. For more smart fundraising strategies, visit [Fired-Up Fundraising \(gailperry.com\)](http://Fired-Up Fundraising (gailperry.com)). 

## Who Should Lead in Times of Crisis?

You may believe the best thing to do in a chaotic time is to stick with the leaders you have. But a new study suggests the opposite. Research by MIT Sloan finds that changing the individuals in charge based on the nature of the issue leads to better collective intelligence and smarter decisions.

Leaders need input from different people during times of change, the study's authors explain. You can call them your "shadow cabinet" if you like. "By listening to the right group of people, you can end up smarter than the smartest person in the group," they say.

The study reinforces the idea that groups can achieve a higher level of intelligence and reach better decisions than individuals alone. The key is recognizing that the group may need to change based on the problem. Managers need to move away from a static hierarchy to systems with more ability to change in response to feedback, the study's authors conclude. Dynamic networks, boosted by feedback, lead to better results than even the best-performing individuals. Learn more at [mitsloan.mit.edu](http://mitsloan.mit.edu). 

## A Playbook for Winning

The lessons of political campaigns can help you develop the skills needed in today's changing, challenging environment. That's the basis of *The Leadership Campaign* (careerpress.com), written by political consultants Scott Miller and David Morey. Through this lens, leadership is seen as constantly motivating followers to your goals through a perpetual series of campaigns.

So who in our sector should read this book? Any organization that advocates (and more should) and leaders in need of a quick motivational fix can learn from this book, as long as they remember that winning a campaign isn't a panacea. Leaders must consider how campaigns can *contribute* to the vision of the organization, not control the organization – or its leaders. This book is only the beginning of any change effort, and it certainly represents only a small facet of leadership. After a campaign, whether in business, government, or social change, “winners” must learn different skills – those of coalition building – in order to progress and meet further success.

Still, this book is full of helpful advice. For example, Miller and Morey segment audiences into various levels of support or opposition and describe how to direct attention to each. They provide excellent tips on commitment and communication, especially framing and holding the frame. The very concept of using campaigns for motivational purposes itself is useful. Other nuggets include:

**Be an insurgent, not an incumbent.** Don't do the predictable. Create change and disruption in the markets you care about. Be a change-leader, not a bigness leader.

**Skate to where the puck will be.** Hockey legend Wayne Gretzky attributed his success to this principle: Don't follow the puck; instead, anticipate where it's heading. It's wise advice: You want to lead your organization to where the market is going, not where it is.

**Always play offense, not defense.** Use change to gain aggressive control of the dialogue.

**Preach to the choir.** Identify your loyalists, and put them to work for you. Their viral communications will reinforce your own messaging.

**Define who you are.** If you don't clearly define yourself, others will do it for you, and you may not like the way they do it. Tell people what you believe – not what you've done in the past but what your values are and where they're leading you. And use real English, not buzzwords. For instance:

- Instead of “core competency,” say “what we do better than anyone.”
- In place of “our associates,” say “the people who work here.”
- Rather than “scalable,” say “capable of growth and therefore worth doing.”
- In lieu of “buy-in,” simply say “agreement.”

**Never say “No comment”** – and never refuse to comment. It's like shouting, “You got me!” Always tell the truth – and do so in the form of a compelling story.

**Celebrate every small win.** And remember, recognition is just as important as reward. 

– reviewed by Terrence Fernsler

## Are You Ready for a Big Donation?

A crucial barrier to receiving huge gifts is a lack of “shovel-ready” projects, according to Bridgespan (bridgespan.org, knowledge@bridgespan.org). Funders want to donate to nonprofits that are prepared to turn donations into enduring change. If you want to receive a momentous gift (what Bridgespan calls “big-bet” gifts in its article “How to Position Your Nonprofit Organization for a Big Bet”), these are the key elements you must have in place – and the questions you must be able to answer:

**1. An Important Problem:** First of all, you need a compelling statement of a problem that's facing a specific, underserved population.

**Questions You Need to Answer:** What is the cost of inaction? Why now? How many are affected?

**2. A 5-10-Year Goal:** You need a clear, concrete goal that lies between your long-term vision and your short-term goals. Make sure this goal is ambitious, measurable, and tied to impact.

**Questions You Need to Answer:** What specific results will your goal achieve? Why do key stakeholders care about this goal?

**3. A Credible Path:** You must have a plan to assure that you'll meet your 5-10-year goal.

**Questions You Need to Answer:** How will you achieve your 5-10-year goal? What evidence suggests that your plan will work? What inputs will be required? What partnerships will be needed?

**4. An Explanation of Why Philanthropy Is Necessary:** Be able to explain why philanthropic resources are the right medium to reach your goal.

**Questions You Need to Answer:** Why is philanthropy the missing ingredient? If funding weren't an issue, what would be the next constraint on reaching your goal?

**5. A Strong Leader & Team:** Your leader and team need a deep knowledge of the challenges involved. It's especially useful to have a track record of success in addressing these challenges.

**Questions You Need to Answer:** Why is your leadership team qualified to execute your plan? Why should the donor trust your team to succeed? 

## The Art of Luck

Some people seem to have all the luck. But good fortune isn't as random as you might think. Luck is a form of creativity, writes Pagan Kennedy in *Inventology* (Houghton Mifflin Harcourt Publishing Company, hmhco.com). Some ways you can “get lucky”:

**Before initiating a plan, time-travel into the future** to predict potential problems. Ask your team to imagine that your plan failed and write down every reason they can think of for the failure. Studies have shown that this kind of “pre-mortem” reduces the damn-the-torpedoes attitude often assumed by those who are over-invested in a project.

**When you make a mistake, replay it** in your mind. Think of all the possible ways you can avoid the error in the future.

Consider how your biases and assumptions may have played into your mishap, and come up with ways to do better. Lucky people have a mindset of continuous improvement.

**Instead of relying on conventional wisdom, seek ideas** from as many diverse people as possible. Ask outsiders for their input. Welcome criticism, and take it to heart.

**When tackling a problem, focus** all your attention on it for a while. Then do something that requires little mental effort – take a walk or a shower – so your mind has time to roam and make connections.

**Consider presenting your ideas on crowdfunding sites** like Kickstarter or Indiegogo. Though we tend to think of crowdfunding as a way to raise money, it's most valuable as a tool for reading the desires of an audience. You have a chance to learn from people's suggestions and criticisms right from the beginning – and to kill a doomed project if necessary. It's a way to learn from your mistakes *before* you make them.

**Pay close attention to everything** around you. Lucky people are especially observant. Their ability to scan their surroundings makes it easier for them to notice useful clues in their environment and take advantage of unexpected opportunities.

**Embrace the idea** of serendipity – the knack of finding things not sought for. Research shows that simply being open to happy surprises affects the way you perceive the world, making lucky breaks more likely.

**Nurture your imagination.** It's the magic power that helps lucky people make enormous breakthroughs. 

## Lead with Emotional Intelligence

In his books *Focus* and *Primal Leadership*, Daniel Goleman describes the importance of emotional intelligence (EQ) in leadership. Some of his tips:

**Practice mindfulness.** Teach it to everyone in your organization. Bring in a speaker on the subject, or enroll employees in mindfulness classes. Mindfulness is, Goleman contends, a shortcut to flow, that state in which you're so engrossed in what you're doing that you lose track of time. To gain that highly desirable state of being, simply be mindful – focus all your attention on the one thing you're doing at this moment; you will naturally dissolve into flow. It's in this condition that you'll be most productive.

**When leading teams, listen carefully** to what's going on in the group. Monitor the emotional tone, and help team members recognize any underlying dissonance. Only when a team confronts its emotional reality will it feel moved to change.

**Rest your mind in natural settings.** Spend regular quiet time in nature. Just sitting by a mural of a nature scene – especially one with water in it – calms and focuses the brain.

**Widen your network.** Your range of attention increases as you up the number of people through which you gain information. Even casual acquaintances can be key sources of the guidance you need to operate in today's complex world. 

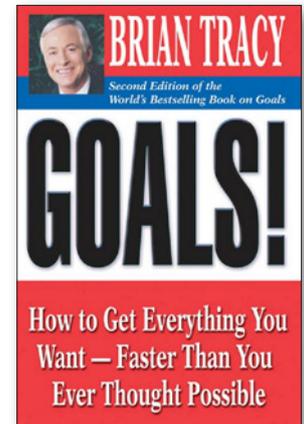
## The Best that You Can Be

Setting goals can unlock your potential and give you direction over your life, as Brian Tracy explains in *Goals! How to Get Everything You Want – Faster Than You Ever Thought Possible* (Berrett-Koehler Publishers, bkconnection.com). Unsuccessful people, Tracy admonishes, spend most of their time thinking about what they don't want. They talk about their problems and who's to blame. Successful people think about what they want and how to get it.

Before you can attain your goals, you need to clarify your values and beliefs. Envision how you want to be, reflect on each step necessary to get there, then relentlessly pursue those steps. Setting times for achieving goals helps measure progress.

Sound familiar? Organizations that go through a strategic planning process will recognize Tracy's goal-setting steps. His suggestions can work for organizations as well as individuals. Many strategic plans gather dust because stakeholders don't envision their goals on a daily basis. Constantly thinking about your goal and behaving as if you've already achieved it is the key to attaining it. Most organizations and the individuals within them can use motivation when it comes to creating plans, managing time, daily visioning, persisting, and learning from shortcomings, and Tracy aims to motivate. 

—reviewed by Terrence Fernsler



## Make Trustworthiness a Habit

"We are what we repeatedly do," Will Durant once said. And trustworthiness can become a habit, John Blakey says in *The Trusted Executive* (Kogan Page Publishers, koganpage.com). Doing so involves a number of steps:

**Be careful when making promises.** It's better to say, "No, sorry, I can't," than to agree to do something you're not sure you'll deliver.

**Create a system for executing tasks.** Have a to-do list. If you delegate a task, add follow-up to your list to be sure the task is done on time and to your specifications.

**Practice having difficult conversations.** If someone around you breaks a promise or is slow to fulfill a commitment, you need to have a talk to assure it doesn't happen again.

**Exceed expectations.** Go beyond your basic promise to deliver more than people expect.

**Choose to coach.** Once you've made trustworthiness a habit, instill that same habit in those around you. Role-model the skills needed, and empower others by believing in them and their abilities. 

## Confronting Stress & Burnout in the Nonprofit Sector

A new report on the health of nonprofit staff (the Wellness Equity Report) describes findings gleaned from treatment of stressed-out nonprofit workers who requested physical and mental health benefits. This Washington, D.C., group was 82% female, 65% people of color, and 54% lower-income.

### Here are the report's five findings:

1. Participants judged themselves, overall, as having poor individual health.
2. Off-site individual benefits were great, but frustrating to access.
3. Of the individual benefits, the phone-based benefits were most accessible and popular.
4. On-site group benefits were unexpectedly appreciated (even with low rates of use).
5. Fostering a culture of wellness takes time and engagement by organizational leadership.

The first three findings aren't that surprising. Of course nonprofit staff are in poor health, can't get out to enjoy studio classes, and therefore must rely on phone-based services.

What was surprising was how effective it was to bring wellness experts into the workplace. In the corporate world, this type of wellness has grown into a seven-billion-dollar industry. But in the nonprofit sector, these wellness benefits are rare.

### Here are the benefits most requested by the participants:

1. Mindfulness or meditation support
2. Financial health coaching, training, and investment advice
3. Workplace team health (assessing learning styles, healthier team events, group-building)
4. Right-brain therapy (tickets for visual arts, theater, musical events)
5. Counseling/therapy (relationships, stress, anxiety, depression, eating, substance abuse)
6. Nutrition counseling.

The report, by Nonprofit Wellness ([nonprofitwellness.org](http://nonprofitwellness.org), [susan@nonprofitwellness.org](mailto:susan@nonprofitwellness.org)), states that "wellness equity" stands for this simple concept: "Those who suffer the most stress deserve the most wellness support." The nonprofit world has long absorbed the stress of changing the world, and some staff absorb a lot more than others, the report's authors say. Now, they add, it's time for the nonprofit world to absorb the world's wellness solutions as well. 

## Giving Shows Growth, Climbing to \$449.64 billion in 2019

The past three years are the three highest years on record for charitable giving, providing an important baseline and context for these uncertain times.

Giving rose 4.2% in 2019, reaching the highest dollar total ever – \$449.64 billion – according to *Giving USA 2020: The Annual Report on Philanthropy for the Year 2019* ([givingusa.org](http://givingusa.org)). Adjusted for inflation, 2019 giving reached the second-highest level on record, just slightly below the all-time-high dollar amount achieved in 2017.

The growth in giving was driven by an increase in giving by individuals, which remains by far the biggest source of giving. Highlights:

**Giving by individuals** totaled an estimated \$309.66 billion, rising 4.7% in 2019 (an increase of 2.8%, adjusted for inflation). Giving by individuals achieved the second-highest total dollar amount on record, adjusted for inflation, and was less than 70% of total giving for only the second time ever.

**Giving by foundations** increased 2.5% to an estimated \$75.69 billion in 2019 (a flat growth rate of 0.7%, adjusted for inflation), reaching its highest-ever dollar amount. Giving by foundations has grown in nine of the last 10 years, and represented 17% of total giving for the second year in a row, the largest share on record.

**Giving by bequest** was an estimated \$43.21 billion in 2019 and was essentially flat with a growth rate of 0.2% from 2018 (a decline of 1.6%, adjusted for inflation). Giving by bequest often fluctuates substantially from year to year.

**Giving by corporations** is estimated to have increased by 13.4% in 2019, totaling \$21.09 billion (an increase of 11.4%, adjusted for inflation). This significant growth is indicative of this type of giving, which is highly responsive to changes in corporate pre-tax profits and GDP, and its year-over-year trend lines tend to be more turbulent as a result.

Nearly all types of nonprofits saw an increase in 2019 giving, says Laura MacDonald, Vice-Chair of Giving USA Foundation. "With the growth in giving from donor-advised funds, planned giving programs, and the evolution to online giving platforms and giving days, there are more varied opportunities than there were 10 years ago for nonprofits to engage with current and prospective donors." 

## Beyond the Briefs

To explore issues raised in these briefs in more detail, check out these articles ([NonprofitWorld.org](http://NonprofitWorld.org)):

**Embrace Mindfulness as a Leadership Practice** (Vol. 36, No. 2)

**Smart & Fast Are Not Enough: The Need for Better EQ** (Vol. 29, No. 1)

**How to Ask When (You Believe) It's Too Soon to Ask** (Vol. 36, No. 4)

**What Kind of Team Leader Are You?** (Vol. 32, No. 5)

**A Path to Stronger Programs, Greater Engagement, and Less Burnout?** (Vol. 36, No. 1)

**Turning the Direct Ask into Gold** (Vol. 30, No. 1)

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

**How to Add an Emotional Hook to Your Fundraising Letters: What to Do and What Not to Do** (Vol. 37, No. 1)

**Coach! The Skill Every Leader Needs** (Vol. 37, No. 1)

**Creating a Culture of Productivity** (Vol. 36, No. 2)

**Better Delegation = Better Leadership** (Vol. 37, No. 3)

**Are You Equipped to Lead in a World of Great Complexity?** (Vol. 37, No. 1)

**How to Make Mistakes** (Vol. 30, No. 2)

**The Word You Hear Most Often in Fundraising** (Vol. 28, No. 4)